



# BEYOND THE SUNDOWNER

DRIVING DISTINCTION IN THE FUTURE OF SPRITZ





**The Spritz category is on a vibrant growth journey, evolving beyond Italy's traditional aperitif hours to reach new occasions and audiences.**

**Where things go next is genuinely exciting.**

Heritage houses are reinventing with new flavours and formats, while bold newcomers redefine what an aperitivo can be. But, as competition intensifies, understanding the forces driving consumption is key to seeing how this movement can keep expanding, and where brands should focus to grow.

**3rd**

**Most popular  
bar call, globally**

Source: Bacardi Cocktail Report 2025

**41%**

**Rank Spritz #1 for  
socialising, globally**

Source: Bacardi Cocktail Report 2025

**26%**

**CAGR in canned alcoholic  
drinks across Europe**

Until 2030, driven by RTD cocktails.  
Source: Grand View Research

**3-4 PM**

**Surging in popularity  
for on-trade drinking**

At a leading UK pub chain  
Source: IWSR



# ROOTS & SHOOTS

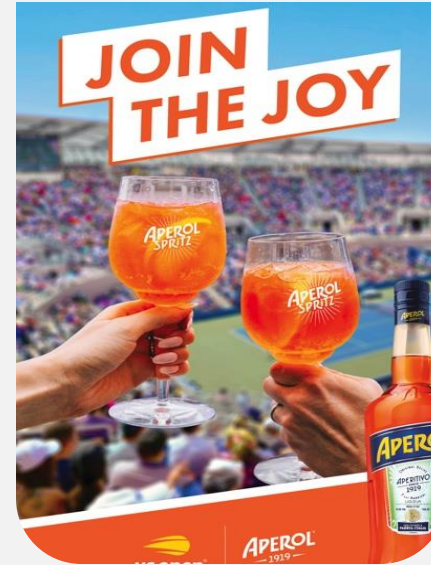
From local tradition to global lifestyle phenomenon – Spritz's 100+ year journey.

Local mediterranean roots, regionality and traditions



20<sup>th</sup> century pioneers of social beverage, iconic designs, and slower tempo occasions

The orange hegemony: Rise of Aperol and its extroverted positioning



Sparkling the revival of heritage brands and legacy-inspired new players



# TODAY, APERITIVO INSPIRED DRINKS HAVE EXPLODED AND THE COMPETITIVE SET IS EVOLVING, FAST.

From adaptogens and premium RTD's to the reinvention of traditional liqueurs into spritz form, players old and new are scrambling to capitalize on the Spritz boom.

## Nootropics



**TRIP** – mega growth sparkling CBD drink tapping into spritz' need states.

## Premium challengers



**MOTH** – top quality cocktails in a can, democratising premium bar drinks.

## Adjacent liquids



**JUBEL** – radler style beer that stretches across occasions into aperitivo moments.

## Low ABV



**Botivo** – bringing slow craft and premium botanicals into the non-alc. aperitivo space and delivering on taste.

## Liquid reinvention



**Cointreau** – reframing a traditional cocktail liqueur into an RTD spritz format.

## Format innovation



**Aperol** – entering the RTD market with their classic aperitivo.





# BUT THE MARKET IS GETTING CROWDED.

DRIVING DISTINCTION IN THE FUTURE OF APERITIVO WILL REQUIRE DEDICATED FOCUS, TO STAND OUT IN SPRITZ’ ‘SEA OF SAMENESS’.



## POTENTIAL RISKS AND CHALLENGES:

### ME-TOO CODES

Aperitivo brands risk becoming formulaic in both product innovation and visual language, endlessly chasing the golden-hour glow that made Aperol iconic.

**HOW IT SHOWS:** Recurring brand colours and semiotic codes across the vast majority of Aperitivo brands.

### THE NEW CRAFT?

The craft beer boom promised authenticity and innovation but ended up alienating its own audience. Once standing for identity and independence, it became synonymous with endless limited editions and technical jargon. The joy drained out, and so did the drinkers.

**HOW IT SHOWS:** -10.9% Drop in volume for craft beers in the last two years.

### SOCIAL FRAGMENTING

The codes of social drinking are morphing towards an ecosystem of individual experiences and self-identity choices, rather than the one-size-fits-all approach that once pushed aperitivo brands forward.

**HOW IT SHOWS:** A third of 18–24-Year-olds in the UK are drinking less than they did a year ago, and 39% of UK drinkers moderate.



SO, WHAT DOES THIS MEAN

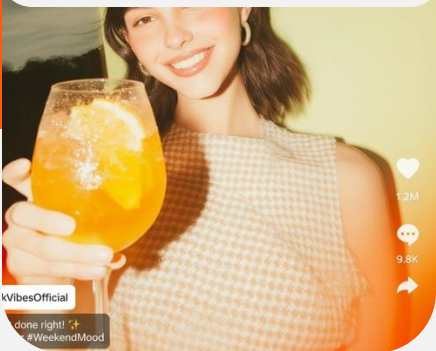
**FOR BRANDS?**



# TO UNDERSTAND WHERE TO PLAY, LET'S UNPACK THE KEY CONSUMER DRIVERS RESHAPING **SPRITZ BEVERAGES**

## Global Culture

Globalisation of trends, borderless homogeneity, culture of remix



**Exploration** is surging in popularity as an alcohol need-state.

## Discerning Mindset

Discernment and intentionality as marker of status and identity



**57%** consumers **extensively research products** or services, highlighting rising intentionality.

## Comforting Familiarity

Need for what's enduring and real, familiarity, local anchor



**58%** global consumers experience **daily stress**, and look to brands for **comfort**.

## Effortless Quality

Convenience, hack culture, or ultra-accessibility



**66.5%** global consumers want a **simpler life**. 42% spend money to **save time**.

## Modern Release

New hedonism, Functionality, Solo / home occasions, Self-optimisation



**10% CAGR** in global **adaptogen** market, until 2030.



# IMPLICATIONS FOR THE FUTURE OF SPRITZ

Taking learnings from the consumer drivers to transform the future of Spritz category

What **cultural** tension does your brand resolve - or what aspiration does it fulfil?

*Consider...*

*Adopting new codes of aesthetics, music and fashion?*

*Challenging conventions and breaking norms?*

*The role of unconventional ambassadors?*

How can you create **new rituals** or **micro-occasions** that extend beyond Apéro hour?

*Consider...*

*Exploring formats and serves?*

*What new occasions you could permissibly stretch into?*

*Thinking of solo moments rather than extroverted golden hour?*

How do you see the **need states** Spritz addresses evolving in the future?

*Consider...*

*Introducing mid-strength versions?*

*Exploring clean energy and restorative ingredients?*

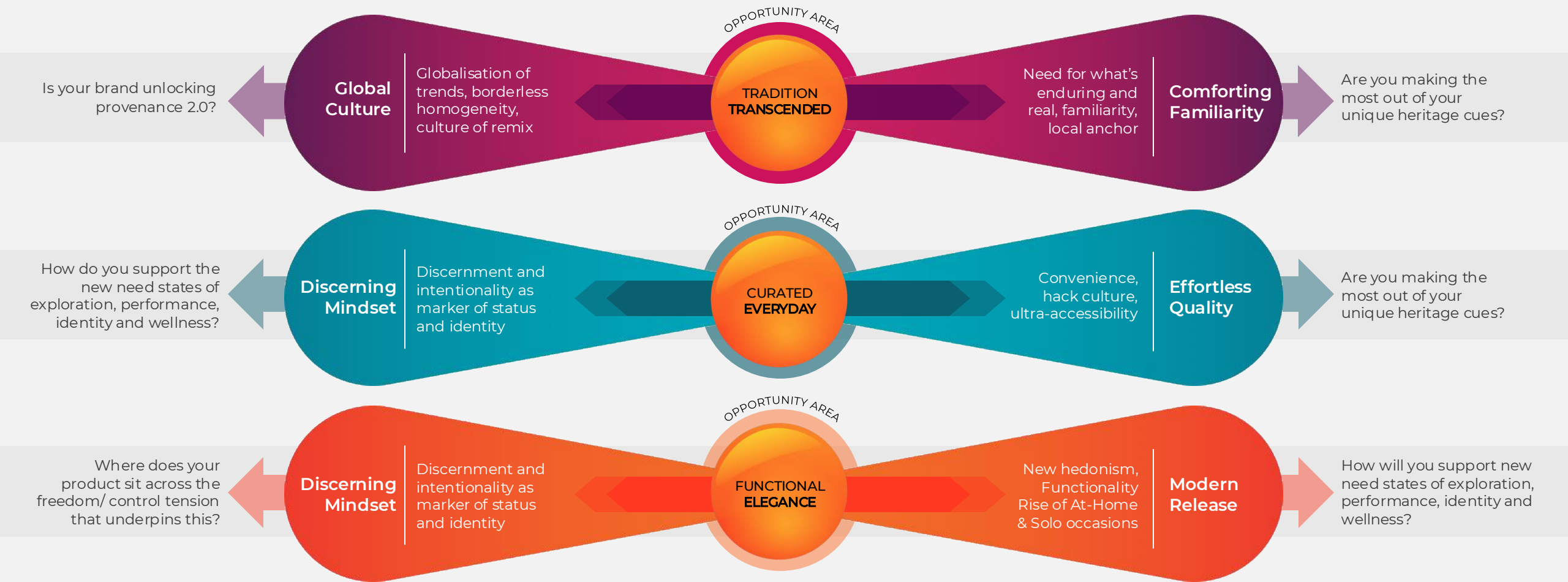
*Reframing your competitive set to include functional drinks?*





# TRANSLATING TENSIONS INTO THREE POSSIBLE FUTURES

By exploring the tension points between the consumer drivers, we can identify opportunity areas for spritz brands.







OPPORTUNITY AREA 1

# TRADITION TRANSCENDED





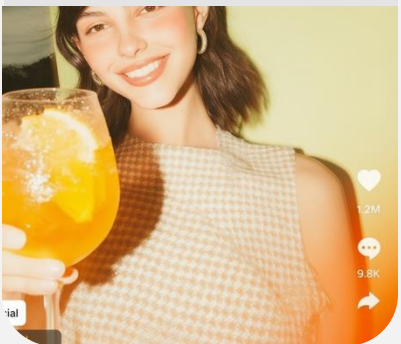
# TRADITION TRANSCENDED

Imagine an aperitivo that translates heritage into contemporary currency. This is about being familiar yet progressive; the effortless fusion of timeless regional cues into the global now, with a sensibility that resonates with increasingly discerning tastes.

## Core drivers

Foundations of the opportunity area

GLOBAL  
CULTURE



COMFORTING  
FAMILIARITY



## Future unlock

How we see it evolving

DISCERNING  
MINDSET

Adding a deeper level of craft and sensibility to the provenance, process and/or ingredients for legacy houses

## THOUGHT STARTERS FOR SPRITZ BRANDS:

What heritage cues could be revived or reframed to build new equities?

How could craft and provenance stories be enriched and elevated?

What progressive ambassadors could bring your brand to new audiences?

## Market manifestations

### CULTURE



#### Nowstalgia

A progressive generation that looks back Gen Z's fixation with the past.

68%

of Gen Z's feel nostalgia towards an era before their birth.

### ADJACENCIES



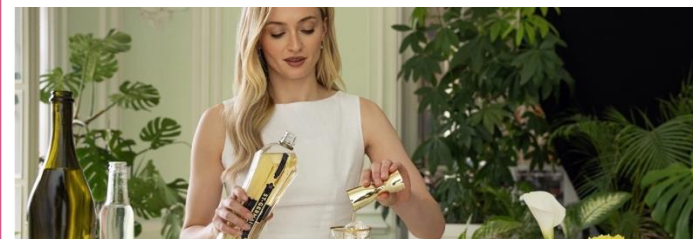
#### Laphroaig x Willem Defoe

Giving sensorial heritage and provenance an unconventional spin.

5M+

Views on Instagram alone, indicating virality and relevance.

### CATEGORY



#### Saint Germain x Sophie Turner

Fun, stylish, independent, and perfectly imperfect – the updated ideal of tradition.

+1,121%

Search volume for Hugo Spritz.



OPPORTUNITY AREA 2

# CURATED EVERYDAY



# CURATED EVERYDAY

Imagine a world where Aperitivo truly breaks free of the on-trade Aperitivo hour and becomes an effortlessly accessible yet elevated daily option. Your small moment of daily luxury, like a quality espresso, fine glass of wine, or crisp white t-shirt, done just right.

## Core drivers

Foundations of the opportunity area

DISCERNING  
MINDSET



EFFORTLESS  
QUALITY



## Future unlock

How we see it evolving

MODERN  
RELEASE

Breaking of social occasions into a self-oriented and considered everyday. Rise of daytime drinking.

## THOUGHT STARTERS FOR SPRITZ BRANDS:

How could format and pack be explored to build daily rituals?

What sensorial cues could indicate a subtle type of premium?

What iconic collabs could be explored to build design-led credibility?

CULTURE



## Everyday Curation

The contentification of the everyday experience

1.5Bn

Global social media users consider themselves content creators.

ADJACENCIES



## The Plain Edit

Rise of sophisticated basics and quiet luxury.

50%

Growth in global accessible luxury market by 2035.

CATEGORY



## Moth Premium Cocktails

ATL "the cocktail in a little black can" signals a move from niche to mainstream.

#1

Premium Cocktail brand in the UK.



A close-up photograph of a woman with short, dark, curly hair, smiling and holding a martini glass filled with a reddish-orange drink. She is leaning her head towards the glass, smelling the drink. The background is softly blurred, showing other people in a social setting. The overall lighting is warm and golden, creating a sophisticated and elegant atmosphere.

OPPORTUNITY AREA 3

# FUNCTIONAL ELEGANCE





# FUNCTIONAL ELEGANCE

Imagine an aperitivo that is elevated and activated, yet instead of stealing tomorrow’s happiness, this is about higher moments of release that benefit mind, brain and body.

## Core drivers

Foundations of the opportunity area

HYPER  
OPTIMISATION



MODERN  
RELEASE



## Future unlock

How we see it evolving

DISCERNING  
MINDSET

Bringing ritual and storytelling to functional spritz.

### THOUGHT STARTERS FOR SPRITZ BRANDS:

How could a proposition tap into desires for holistic wellness?

How can sensorial codes be borrowed from the wellness space?

What active ingredients could be explored to create a drink with a health-focused release?

CULTURE



**Self-Discipline = Status**  
Control, clarity and discipline as new social currency

**+1,328%**  
Search for “Great Lock In” self discipline trends in September 2025.

ADJACENCIES



**A mood in a can**  
Selling a vibe rather than a product.

**88%**  
Share of UK CBD drinks. Trip is the category.

CATEGORY



**Kin Euphorics Spritz**  
Adaptogen aperitivo, bringing luxury to function.

**15%**  
Of UK consumers now consume adaptogenic or herbal drinks regularly.



# WHAT DOES THE CATEGORY'S FUTURE MEAN FOR YOUR BRAND OR PORTFOLIO?

We can run a free 1.5hr work session **to unpack opportunity areas** and apply them to your brand or portfolio. Opening the dialogue on big topics, such as:

- How do you defend against agile insurgent brands?
- How do you compete against the new frontiers of functional beverage?
- What hidden assets are currently under-leveraged?

## OPPORTUNITY AREA DISCUSSION



1 HOUR  
SESSION



ONLINE



FREE OF  
CHARGE







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# THANK YOU