Sustainability & Wine In Ireland:

EXECUTIVE SUMMARY

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IRELAND'S FIRST REPORT ON SUSTAINABILITY IN WINE

About This Research

In 2025, Give Wine a Future commissioned Ireland's first independent assessment of sustainability in wine. Through anonymous surveys of 233 respondents across four key cohorts – wine consumers (174), wine trade (22), importers (31), and multiple retail buyers (6) – this research provides baseline data on sustainability attitudes, understanding and practices across Ireland's unique wine sector.

As an island nation importing virtually all wine consumed, Ireland faces distinct sustainability challenges around packaging and transportation emissions. This report identifies where collective action could deliver meaningful impact.

The report draws on:

- New primary research surveys across four cohorts (wine consumers, importers, trade and buyers for multiple retailers in Ireland) and cross-cohort analysis to identify alignments and disconnects across the value chains.
- Secondary research providing international examples of existing collaborative campaigns for climate action in wine (SWR, IWCA), as well as reference points for understanding the carbon footprint of a wine's value chain.

What We Found

1. Sustainability Matters – But Understanding Varies Widely

Across all groups, 'sustainable wine' is generally defined as being produced with environmentally friendly practices (ideally with sustainable certification, organic farming practices and low-emissions production and packaging) and under fair labour practices. However, understanding differs dramatically between wine professionals (high consensus, minimal uncertainty – although opinion is divided about 'natural', additive-free wine or no added sulphur) and consumers (considerable confusion, particularly around regenerative viticulture and biodynamic practices).

Wine importers show the highest engagement: 100% agree regenerative farming is central to sustainability. Buyers view sustainability as a core business value, though formal strategies remain developing. Trade partners want to 'do the right thing' but cite limited resources and perceived lack of consumer demand. Consumers express interest (64% consider sustainability to some degree when making a purchase).

For consumers, sustainability certification and accreditation has a value of reassurance if not a strong purchasing influence. There is a high understanding of official accreditation amongst importers and buyers but less weight accorded to it, however 'organic' credentials in particular are perceived by trade as important to consumers.

2. The Communication Gap Is Costing Opportunities

Even where sustainability is central to business values, communication with consumers rarely extends beyond bottle labels. Most buyers (60%) don't communicate about sustainability beyond existing labelling. Trade relies primarily on menus and staff recommendations, with digital platforms significantly underused.

Yet businesses that do actively communicate report positive consumer feedback. Consumers want clear, simple, immediately accessible information and respond well to staff guidance. The infrastructure exists; coordinated content is what's missing.

3. Lightweight Bottles: The Immediate Win

The research reveals a rare alignment: an actionable opportunity with existing infrastructure, professional support and latent consumer demand.

- **Infrastructure exists:** 66% of importers and 80% of buyers already stock lightweight bottles
- **Consumer preference:** 54% would already choose lightweight bottles as their first alternative format preference
- **The awareness gap:** 67% of consumers say knowing a lighter bottle benefits the environment would make them more likely to choose it – yet current awareness is virtually non-existent
- **The impact:** Packaging accounts for 29% of wine-related GHG emissions (the single largest contributor) and case goods transport to distributors and consumers another 17%, with bottle weight a primary driver

Two-thirds of consumers don't believe heavy bottles correlate with quality wine. The outdated perception of 'heavy = premium' lacks evidence but persists. An industry-wide focus on lightweight bottles could deliver measurable environmental impact with minimal disruption.

4. We're Talking About the Wrong 15%

Sustainability conversations focus heavily on vineyard and winery operations (Scope 1 & 2: 15% of emissions) – the romantic, easily communicated part of the wine story [1]. Meanwhile, Scope 3 emissions (packaging, transportation, outsourced elements: 85% of emissions) receive far less attention despite accounting for the majority of environmental impact [2].

Common misconceptions persist around 'food miles'. Secondary research shows transportation mode matters far more than distance: trucks generate 10× the emissions of container ships; air freight generates 47× the emissions of ocean freight per tonne-mile [3]. Yet professionals show mixed understanding, and consumers rarely consider this nuance.

1. www.iwcawine.org/ghg-emissions
2. ibid.
3. p5, Food Miles Story 2025, www.nzwine.com/en/sustainability/food-miles

Both importers and buyers report feeling well-informed about carbon footprint efforts but acknowledge actual supplier data is often missing – a gap between perception and verification that risks perpetuating assumptions.

5. Price Isn't the Barrier – Understanding Value Is

Three-quarters of consumers are willing to pay €1–5 extra for certified sustainable wine. Price and promotions are incentives in purchases but not barriers to choosing sustainable options. When asked what would encourage sustainable wine choices, consumers ranked 'same price as non-sustainable' as the lowest factor – they care more about guaranteed taste and recommendations.

The real barrier is understanding the value proposition. Personal benefits drive behaviour: consumers care more about guaranteed wine enjoyment than distant environmental impacts. The personal benefit of choosing sustainability could be framed as absence of pain (one less thing to feel bad about) rather than promise of distant gain.

For wine professionals, cost pressures exist – particularly around the expense of formal certification for smaller producers who often already practice sustainable methods through traditional, family-owned approaches.

6. Education Is the Cornerstone for Everything Else

Every cohort identifies knowledge gaps as a primary barrier and education as the most welcome support:

- **Consumers** need clearer understanding of regenerative viticulture, biodynamic practices, carbon emissions realities, bottle weight impact and quality associations
- **Trade** welcome detailed information from importers, clearer packaging guidance, staff training, consumer-friendly materials; and cite lack of consumer understanding as major barrier
- **Importers** rank 'knowledge and education' as most important support; and identify gaps across consumers, trade and media
- **Buyers** recognise consumer education needed; and welcome certification guidance and carbon measurement tools

Education addresses consumer confidence, staff training, myth-busting, value proposition understanding and supply chain realities. It's the foundation upon which all other sustainability initiatives must be built.

7. Collaboration: Tentative Appetite With Clear Conditions

There is widespread openness to cross-industry collaboration across all professional cohorts, but it remains tentative and conditional:

- **Importers:** Mostly open but stress need for transparency, inclusivity, neutral facilitation, practical focus and respect for limited resources (time, people, money)
- **Buyers:** Open to collaboration with clear agendas and measurable goals, provided there is alignment with internal business values
- **Trade:** 90% open to collaboration; high desire for knowledge sharing, tasting events, co-promotion

Consistent requirements emerge: **inclusivity** (all sectors and business sizes), **transparency** (clear goals, neutral facilitation), **practicality** (measurable actions, not just discussion), **trust** (currently lacking between competitors), **resource respect** (significant constraints exist) and **alignment** (must fit existing strategies).

Previous collaborations have been limited and trust between competitors is perceived as low. However, specific collaboration areas generate genuine interest: knowledge sharing and education, trade and consumer tastings, industry accord on bottle weight, shared sustainability toolkit, staff training programmes and certification guidance.

The Opportunity

Ireland's unique position as an island nation importing virtually all the wine it consumes creates specific sustainability challenges – but also creates an opportunity to develop uniquely Irish approaches, potentially positioning the sector as an international leader.
The infrastructure for meaningful change exists. Suppliers already stock lightweight bottles. Businesses already implement sustainable sourcing. Consumers already express willingness to pay for value they understand. What's missing is coordination, communication, and confidence.

The question is not whether Ireland's wine sector should take collective action on sustainability, but what form that action should take and who should lead it. This report provides the baseline data and identifies clear opportunities. The next step is conversation: inclusive, honest, and focused on practical action that balances commercial success with environmental responsibility.

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For full report and detailed findings scan the QR code