

Sustainability & Wine In Ireland:

IRELAND'S FIRST SUSTAINABILITY
IN WINE REPORT



Commissioned by Give Wine a Future
Written by Aoife Carrigy
Research conducted and analysed by
Aoife Carrigy and Judith Boyle

CONTENTS

I. SUSTAINABILITY & WINE IN IRELAND: EXECUTIVE SUMMARY 4

II. INTRODUCTION 7

Why commission a sustainability in wine report?

- Independently commissioned for integrity
 - About Give Wine a Future (GWAF)
 - The inspiration for this report
 - Secondary research referenced as contextual framework
-

III. METHODOLOGY OVERVIEW 12

IV. SUSTAINABILITY SURVEY 1: WINE IMPORTERS 13

Importers at a Glance

Defining 'sustainable wine': what does it mean to importers?

- Key terms of definition
- Further insights
- Focus on: Associated wine supply chain areas

Awareness of and engagement with sustainability

- Focus on: Regenerative Viticulture
- Focus on: Emissions and carbon footprint

Commercial value of sustainability in wine

Attitudes to alternative packaging

Challenges and opportunities for improving sustainability

- Focus on: Consumer & Stakeholder Education
 - Focus on: Cross-Industry Collaboration
-

V. SUSTAINABILITY SURVEY 2: WINE CONSUMERS 29

Consumers at a Glance

Defining 'sustainable wine': what does it mean to consumers?

- Key terms of definition
- Further insights

Awareness of and engagement with sustainability

Commercial value of sustainability in wine

Enticements to choosing sustainable wines, including communications and price

- Focus on: Price sensitivity

Attitudes to alternative packaging

- Focus on: Environmental impact of glass and correlation with quality wine
-

VI. SUSTAINABILITY SURVEY 3: WINE TRADE 43

Wine trade at a glance

Defining 'sustainable wine': what does it mean to wine trade?

- Key terms of definition
- Further insights

Commercial value of sustainability in wine

- Positive reasons for listing sustainable wines
- Barriers for listing sustainable wines
- Further insights



Attitudes to alternative packaging

Awareness of and engagement with sustainability, including internally

Challenges and opportunities for improving sustainability

- Focus on: Collaboration and outlook
- Further insights

VII. SUSTAINABILITY SURVEY 4: WINE BUYERS

59

Wine buyers at a glance

Defining 'sustainable wine': what does it mean to wine buyers?

- Key terms of definition
- Further insights

Awareness of and engagement with sustainability, including internal practices

- Focus on: Carbon footprint of wines sourced

Commercial value of sustainability in wine

- Further insights: How sustainability credentials and accreditations influence purchasing

Attitudes to alternative packaging

Challenges and opportunities for improving sustainability

- Focus on: Collaboration

VIII. SUSTAINABILITY & WINE IN IRELAND: CROSS SURVEY ANALYSIS

70

Defining 'sustainable wine': a comparative analysis

- Key terms across all groups: at a glance
- Key themes and comparative findings
- Group-by-group differences: Recap at a glance

Comparative attitudes to and engagement with sustainability in wine

- Comparative engagement levels
- Comparative attitudes to sustainability certification and accreditation
- Comparative attitudes to and knowledge of regenerative viticulture
- Comparative attitudes to alternative packaging
- Comparative attitudes to carbon emissions

Comparative challenges, barriers and opportunities

- Communication/message gap
- Education and knowledge sharing
- Training and tastings
- Consumer knowledge gaps
- Price sensitivity and commercial value of sustainability
- Tentative openness to industry collaboration

Other challenges, barriers and opportunities

IX. METHODOLOGY: FURTHER DETAILS

84

Who was surveyed?

Limitations and scope of surveys and report

- Engagement and completion rates
- Potential inbuilt biases to consider

X. SUSTAINABILITY & WINE IN IRELAND: KEY FINDINGS AT A GLANCE

87

SUSTAINABILITY & WINE IN IRELAND: EXECUTIVE SUMMARY

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

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 practise 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; identify gaps across consumers, trade and media

- **Buyers** recognise consumer education needed; 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 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.

Report written by: Aoife Carrigy

Research by: Aoife Carrigy and Judith Boyle

Commissioned by: Give Wine a Future



SUSTAINABILITY & WINE IN IRELAND: IRELAND'S FIRST SUSTAINABILITY IN WINE REPORT



Why commission a sustainability in wine report?

Ireland's wine sector and market is unique in many respects: historically, socially, culturally, fiscally, logistically, geographically. We have notably different wine duty rates and health-related policies to our neighbours in the UK, Europe and beyond.

AS AN ISLAND, OUR WINE SECTOR ALSO HAS SOME UNIQUE SUSTAINABILITY CHALLENGES.

As an island, our wine sector also has some unique sustainability challenges. Apart from a small handful of domestic vineyards and winemakers, we import all of our wine onto these shores. Therefore, tackling emissions from packaging and transportation arguably matters more than in other countries with a local wine supply.

We have recently seen the wine sector work together to face a shared challenge, when the Irish Association of Wine Suppliers (IAWS) was established to respond to proposed labelling laws which would impact Irish wine trade and importers in unique ways not shared by other drinks sectors in Ireland.

We have also seen in recent years international collaborative efforts by organisations such as the cross-industry Sustainable Wine Roundtable (SWR) and the International Wineries for Climate Action (IWCA). These collaborations were formed in acknowledgement of the strength of collective action.

COLLECTIVE ACTION CAN HAVE GREATER IMPACT THAN WHAT CAN BE ACHIEVED BY INDIVIDUAL COMPANIES

Ireland's wine sector similarly has the potential to come together to proactively tackle questions of sustainability in wine in Ireland. Collective action can have greater impact than what can be achieved by individual companies, especially if it is specific to

Ireland's unique challenges. However the first step must be to gather baseline data on sustainability in the Irish wine trade in order to know what those challenges are before embarking on whatever the next phase might be.

Although sustainability reports exist, there is no data on Ireland's unique position regarding sustainability in wine. This presents an opportunity to develop a uniquely Irish model of wine sustainability. As an island nation, there is potential to make impactful headlines with industry-wide sustainability initiatives, as **"Ireland becomes the first country in the world to ..."**. Those initiatives might be an Irish wine industry accord on bottle weight; or a common industry sustainability standard or toolkit; or retail partnerships or consumer awareness campaigns; or something else again.

This report aims to provide insights and kickstart inclusive conversations that could guide what those might look like, with the objective of developing sustainability initiatives that the whole industry can support.

Independently commissioned for integrity

In 2025, Aoife Carrigy was commissioned by Give Wine a Future to compile this report on **Sustainability & Wine in Ireland**. The author was engaged as an independent voice to ensure the integrity of the primary research and resulting report. Through anonymous online surveys, this research assesses the current sustainability landscape in four key cohorts: wine importers and distributors; wine buyers (multiple retailers); on-/off-trade; wine consumers.

See overleaf for details of the methodology, scope and limitations of the report.

About Give Wine a Future (GWAFF)

Give Wine a Future is an initiative established by Findlater & Co. in 2021, born of the realisation that there is an urgent need for Ireland's wine sector to take action and lead by example on climate change. Its initial activities started with a series of seminars with local and international speakers focused on shining a light on sustainability and climate-related challenges in wine today.

There have been increasingly devastating climate-related events in Europe in recent years, including wildfires, extensive flooding, heat-waves and drought. The world is facing a tipping point, and without a commitment to climate action from across industry and society at large, this crisis will become a catastrophe.

CLIMATE ACTION MEANS A COMMITMENT TO A MODEL OF SUSTAINABLE BUSINESS, AND FOR WINE IT GOES BEYOND WHAT HAPPENS IN THE VINEYARD.

Climate action means a commitment to a model of sustainable business, and for wine it goes beyond what happens in the vineyard. Indeed the biggest contributors to carbon footprint for wine producers is everything outside of the vineyard – water management, energy use, packaging and transport [4].

We know that big businesses have the power to drive change. **The aim of GWAFF is to educate and inform the wine trade, to help them to make informed choices and educate the consumer in turn** – and ideally to work collectively with other wine importers and distributors towards that common goal. By working together, as individuals and as corporate entities, it is possible to bring about real and lasting change and to help mitigate against the worst effects of climate change.

The inspiration for this report

In 2024, wine writer Aoife Carrigy curated and chaired a seminar for Give Wine a Future entitled 'Common Grounds for Sustainable Growth'. The event featured a keynote contribution from Mireia Torres Maczassek, Director of Knowledge and Innovation at Familia Torres, alongside four local Irish change-makers sharing their valuable experiences as growers, producers, chefs, buyers, business owners and directors, policy makers and public engagers. One of those local speakers was Aisling Rogerson, business owner and entrepreneur behind The Fumbally café, food and wine retail and events space. Rogerson spoke on the day about the learnings of co-commissioning an independent report written by Tom O'Dea on '**Environmental and Ethical Decision Making in Irish Food Business**' (2019). It was commissioned by The Fumbally with the support of 28 other like-minded Irish food businesses and launched at their then-annual EAT:ITH series of workshops, talks and events surrounding food. It can be read both in full and in summary at www.eat-ith.com/report.

The report details and analyses the significance of certain choices available to food businesses in terms of their impact on people and environment, with the aim of helping businesses navigate what can be very complex and sometimes counterintuitive messaging of food choices.

For example, one key finding was that "(t)here are significant differences in the greenhouse gas (GHG) intensity of various plant production methods relating to seasonal and geographical appropriateness, whereas transport distance or 'food miles' are generally a relatively poor indicator of total emissions"[5].

At the report launch, a rapporteur captured some of the reaction to these findings, such as the workshop participant member who expressed surprise: "You're saying that a cucumber or a courgette grown in a heated greenhouse in Ireland has twice the amount [of emissions], including all of the travel, as an avocado coming from South America?"[6].



Give Wine a Future

4. www.iwcawine.org/ghg-emissions

5. p3, O'Dea, Tom. 2019. 'Environmental and Ethical Decision Making in Irish Food Business: Summary', <https://thefumbally.ie/research/>

6. p13, *ibid*.



Secondary research referenced as a contextual framework

Any deep dive into questions of sustainability in wine similarly throws up plenty of counterintuitive surprises. That it is less what happens in the vineyard and primarily what happens beyond it that contributes to wine production's carbon footprint. [7] That how far a wine travels is less significant in terms of emissions than how it has travelled [8] and how heavy it is [9].

Besides the aforementioned report commissioned by The Fumbally, there are several other research findings that are referenced in this report as a framework to help the author inform and contextualise the primary research of the central surveys.

Food Miles Story (2025, NZW)

New Zealand Winegrowers (NZW) is the national organisation for the country's grape and wine sector. Their recently updated report entitled 'Food miles: A small part of the sustainability story for NZ Wine' [10] references several studies that show how the popular concept of 'food miles' (i.e. that the further a food or drink travels from source to market, the greater its GHG emissions) is complicated by several factors, including

“THE VASTLY DIFFERENT GHG EMISSIONS RESULTING FROM DIFFERENT FORMS OF TRANSPORT”.

They argue that wine from New Zealand is typically ocean freighted to international markets which produces significantly lower emissions than transport by air, road, or rail [11].

They reference a U.S. study by **MIT academics** [12] which found that a bottle of Californian wine sent to New York had almost twice the carbon footprint (x 1.8) of a bottle of wine imported to New York from France, due to the Californian wine being transported by primarily trucks.

The report findings shows that, based on emissions output from moving goods one mile,

trucks generate **six times the emissions of rail**, and



x6

10 times the emissions of container ships, and that



x10

long-haul **air freight** generates **47 times** as much emissions per ton-mile **as ocean freight**.



x47

The take-away message is that

“DISTANCE DOES NOT SIMPLY EQUAL A HIGHER CARBON FOOTPRINT”.

7. www.iwcawine.org/ghg-emissions

8. Simchi-Levi, David. 2013. Operations Rules: Delivering Customer Value through Flexible Operations. The MIT Press.

9. <https://sustainablewine.co.uk/wp-content/uploads/2023/09/SWR-Report-Reducing-Wine-Bottle-Weight-2023.pdf>

10. www.nzwine.com/en/sustainability/food-miles

11. p5, Food Miles Story 2025,

www.nzwine.com/en/sustainability/food-miles

12. Simchi-Levi, David. 2013. Operations Rules: Delivering Customer Value through Flexible Operations. The MIT Press.

Reducing Wine Bottle Weight (2023, SWR)

The **Sustainable Wine Roundtable** (SWR) report on **Reducing Wine Bottle Weight (2023)** outlines the findings of an action research project undertaken between October 2022 and February 2023 [13]. This led to the related Bottle Weight Accord campaign launched in November 2023, with the aim of reducing the carbon footprint of wine packaging.

The report highlights a common industry perception that consumers associate heavy bottles with better quality wine, and would be reluctant to buy lighter bottles. However they point out there is weak evidence to support this.

This position is supported by this report's findings of perceptions about bottle weight amongst Irish wine consumers.

GHG Hotspot Map (2023, IWCA)

The International Wineries for Climate Action (IWCA) was established in 2019 as a collaborative working group of wineries focused on a science-based approach to reducing carbon emissions across the wine industry. In 2023 and again in 2025 they published a **Greenhouse Gas Emissions Hotspot Map** [14] to provide a proportional breakdown by category in the wine value chain of emissions, based on Scope 1, 2 and 3 emissions from their member wineries as reported in their externally audited GHG inventory data.

The IWCA uses the internationally accepted Scope 1, 2 and 3 greenhouse gas categorisation as the basis for its winery emissions inventories. These three scopes were developed under the GHG Protocol by the World Resources Institute and World Business Council for Sustainable Development [15].

The IWCA annual report 2024 states: "By far the largest proportion of winery emissions fall under Scope 3 – those that are not directly under companies' control. Tackling this issue requires innovation and collaboration right across the value chain of the global wine industry." [16]

Scope 1 refers to "direct emissions from activities under a company's control" [17]. In the case of wine, this includes fuel use for company business across the winery, vineyard and logistics (5.2%), vineyard soil emissions and fertiliser emissions from nitrogen application (2.9%), onsite waste such as methane from wastewater treatment (1.6%), and emissions from refrigerant gases (1.1%), combining to a total of 11.3% for Scope 1.

Scope 2 refers to "indirect emissions from purchased or acquired electricity, steam, heat and cooling" [18]. In the case of wine, this means electricity purchased from the local utility grid (3.7%), and includes a mix of location-based and market-based emissions including those related to refrigeration.

Scope 3 refers to "indirect emissions derived from the company's activity: that is, any emissions not under the direct responsibility of the firm that are spread across the company's value chain" [19]. In the case of wine, the IWCA's GHG Hotspot Map shows that 85% of GHG emissions in the wine value chain come from Scope 3. A full 52% of total GHG emissions relate to the packaging and transportation of the wine. These breakdown as:

- packaging such as wine bottles, wine bag in box, corks, capsules, screwcaps, labels, stickers, etc (29.2%),
- other packaging such as partitions, separators, carton, tissue paper, slip sheets, etc. (4.1%), purchased bottling material and wine barrel transport (1.4%) and
- case goods transport to distributors and consumers (17%).

The remaining 33% is made up of:

- purchased grapes from external grower partners and purchased wine, bulk wine, or distillate (17.1%),
- employee commute (1.6%),

- business travel by car, plane, train, etc. (1%),
- disposal of the product, if not recycled (1.5%)
- upstream stationary and mobile fuel emissions not accounted for in another category (1%)
- offsite solid waste and recycling including its transport (1%), and
- other Scope 3 accountable categories that, representing less than 1% of total emissions, have not been labelled (combining to 4.8%).

The IWCA developed guidance and winery-specific GHG calculator tools to allow member wineries to measure and compare both direct and indirect emissions across their value chain. These are aligned with both the GHG Protocol and ISO-14064 verification standards, and are third-party audited. They then shared the combined results of their members' audited inventories to show where GHG hotspots exist in an average winery, providing them with a robust foundation for collective climate action and their net-zero strategy.

It is interesting to compare the figures provided in earlier infographics with their latest data and to note that the total of GHG emissions relating to the packaging and transportation of the wine had grown from 40% in 2023 to 52% in 2024. This change may result from the growth in number of IWCA winery members but also from the collective effort by companies and employees to reduce the emissions they have control over.

13. <https://sustainablewine.co.uk/wp-content/uploads/2023/09/SWR-Report-Reducing-Wine-Bottle-Weight-2023.pdf>

14. www.iwcawine.org/ghg-emissions

15. www.iwcawine.org/standards

16. www.iwcawine.org/annual-reports, p16, 4th Annual Report 2024

17. www.iwcawine.org/ghg-emissions

18. *ibid.*

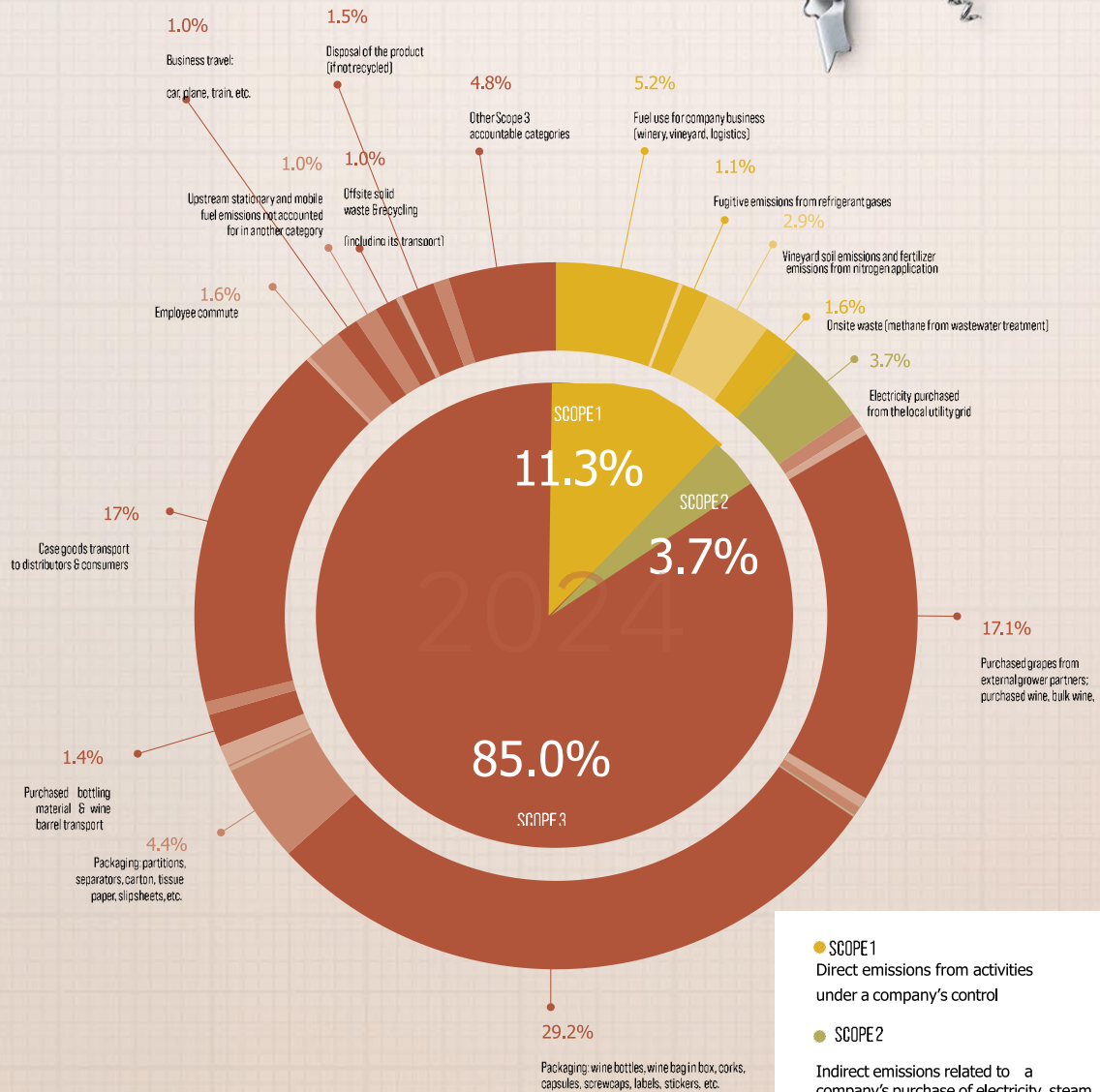
19. *ibid.*



2025

IWCA AVERAGE WINERY EMISSIONS 2024

We crunched the Scope 1, 2 and 3 numbers across the IWCA membership to understand the sources of emissions from throughout the entire wine value chain.



Activities representing less than 1% of total emissions have not been labeled.

See all emissions categories that must be accounted for by IWCA Members' inventories [here](#). Scope 2 data include a mix of location-based and market-based emissions.

- SCOPE 1
Direct emissions from activities under a company's control
- SCOPE 2
Indirect emissions related to a company's purchase of electricity, steam, heat, or cooling
- SCOPE 3
Indirect emissions derived from the company's activity across its value chain

METHODOLOGY OVERVIEW

The intention of this report is to provide insights into sustainability in wine in Ireland, including attitudes to it, knowledge of it and engagement with it.

The aim is that the report would provide fresh and objective understandings upon which to base a conversation within the Irish wine sector about mutually beneficial ways in which various stakeholders could work together to further shared sustainability goals. As such, the report frames these insights in the broader context of collaborative organisations already working towards shared sustainability goals within the wine sector internationally, and the author has sought to raise questions, draw connections and suggest possible calls to action that might potentially follow post-publication.

The introduction to the report outlines several relevant pieces of **secondary research** published by International Wineries for Climate Action (IWCA), Sustainable Wine Roundtable (SWR) and New Zealand Winegrowers (NZW).

Following this contextual introduction, the main focus of the report is on **primary research** conducted in August and September 2025 to gain those insights regarding sustainability in wine in Ireland from three distinct perspectives by conducting parallel surveys of three distinct cohorts.

These three cohorts were identified as:



While designing the surveys, a fourth cohort with another distinct perspective was also identified:



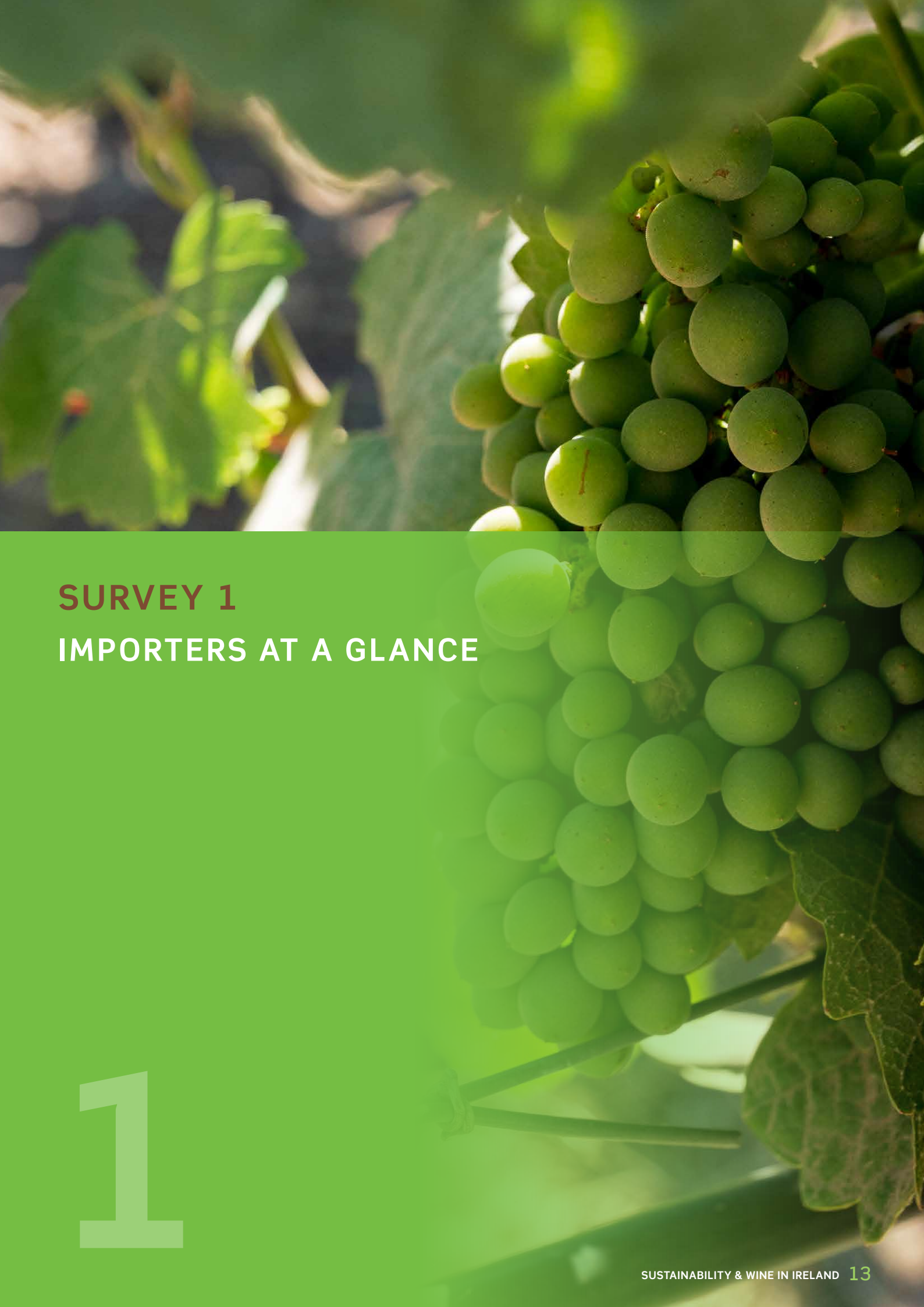
The resulting four surveys were designed on behalf of the GWAFF initiative by the author Aoife Carrigy with the valuable help of **Judith Boyle, Beverages Lecturer at Technological University Dublin**. Boyle was engaged to share her experience and expertise in conducting primary research through online surveys and the related quantitative research analysis necessary to make best use of the insights available.

The surveys sought to harness the voice of various sectors of the Irish wine community to see what sustainability means to them, giving us inter-relating data that could be compared across all surveys. We used a **combination of non-optional quantitative questions** (for example, yes or no answers, or rating terms or phrases etc) and **optional, open-text, qualitative questions** (for example, inviting further optional thoughts, insights or reasonings behind the previous question).

Each survey was conducted online, with **anonymity** assured through the use of Typeform as an independent platform. Questions that might identify respondents or compromise competitiveness were avoided, as was the collecting or tracking of emails – instead redirecting respondents on completion of the survey to Findlater & Co website where they could sign up to an optional mailing list.

Circulation of the report was by email and LinkedIn in the case of importers, buyers and trade, and an online presentation was made to members of the Irish Association of Wine Suppliers (IAWS) to encourage engagement. For consumers, the survey was circulated on Instagram by Findlater & Co and several wine influencer collaborators. Consumers were incentivised to partake with two chances to win a case of wine.

SEE METHODOLOGY FURTHER DETAILS (p.84–86)



SURVEY 1
IMPORTERS AT A GLANCE

1

IMPORTERS AT A GLANCE

Broad Understanding of Sustainability

Importers define sustainable wine across environmental, social and operational dimensions – but sustainability certification and accreditation rate low in relevance (around 12.5%), as many importers value on-the-ground practices over formal accreditation.

Consensus on Core Sustainability Concepts

There's full or near-full agreement on regenerative farming, environmentally friendly production and carbon-neutral/low-emissions approaches as central to sustainability. Natural or vegan wine, added sulphur and the impact of air miles are more divisive.

Gap Between Awareness and Practical Data Access

While most both value and feel informed about efforts to lower carbon footprints, actual supplier data is often missing.

Balancing Sustainability with Commercial Realities

Sustainability influences purchasing decisions (one third say sustainability always influences their import choices; over half say it often or sometimes does) but is balanced against quality, value/cost and traditional market expectations.

Alternative Packaging: Interest vs. Market Demand

Openness to alternative formats exists (two thirds stock lightweight glass; one third stock bag-in-box; one quarter stock cans) but consumer acceptance and quality concerns limit progress.

Education as a Cornerstone for Progress

Importers identify knowledge gaps – across consumers, trade stakeholders and media – as a barrier to wider sustainability adoption. Education is consistently highlighted as essential to advancing sustainability adoption and supporting tangible, practical action within the Irish wine sector.

Tentative Openness to Cross-Industry Collaboration

Most importers are tentatively open to working together with peers, competitors and partners towards practical collaborative actions within the Irish wine sector, but stress the need for transparency, inclusiveness and neutral facilitation, and express concerns about adding extra strain on low resources (people, time, financial).

SUSTAINABILITY SURVEY 1: WINE IMPORTERS



The Irish Wine Importers' Sustainability Survey was designed to understand their general awareness and understanding of sustainability practices and credentials, and the degree to which sustainability is integrated into Irish wine importers' day-to-day decisions and planning (including what drives purchasing decisions, issues of packaging, transport and emissions, and internal sustainability efforts).

Key sections of the survey included:

- Company Profile
- Awareness of Sustainability in Wine
- Understanding of Sustainability Practices and Credentials
- Transport, Packaging and Emissions
- Industry Collaboration and Future Plans

The objective for this survey was to gain insight into levels of engagement amongst importers with sustainability issues, and to ascertain challenges and opportunities, plus levels of appetite for cross-industry collaboration.

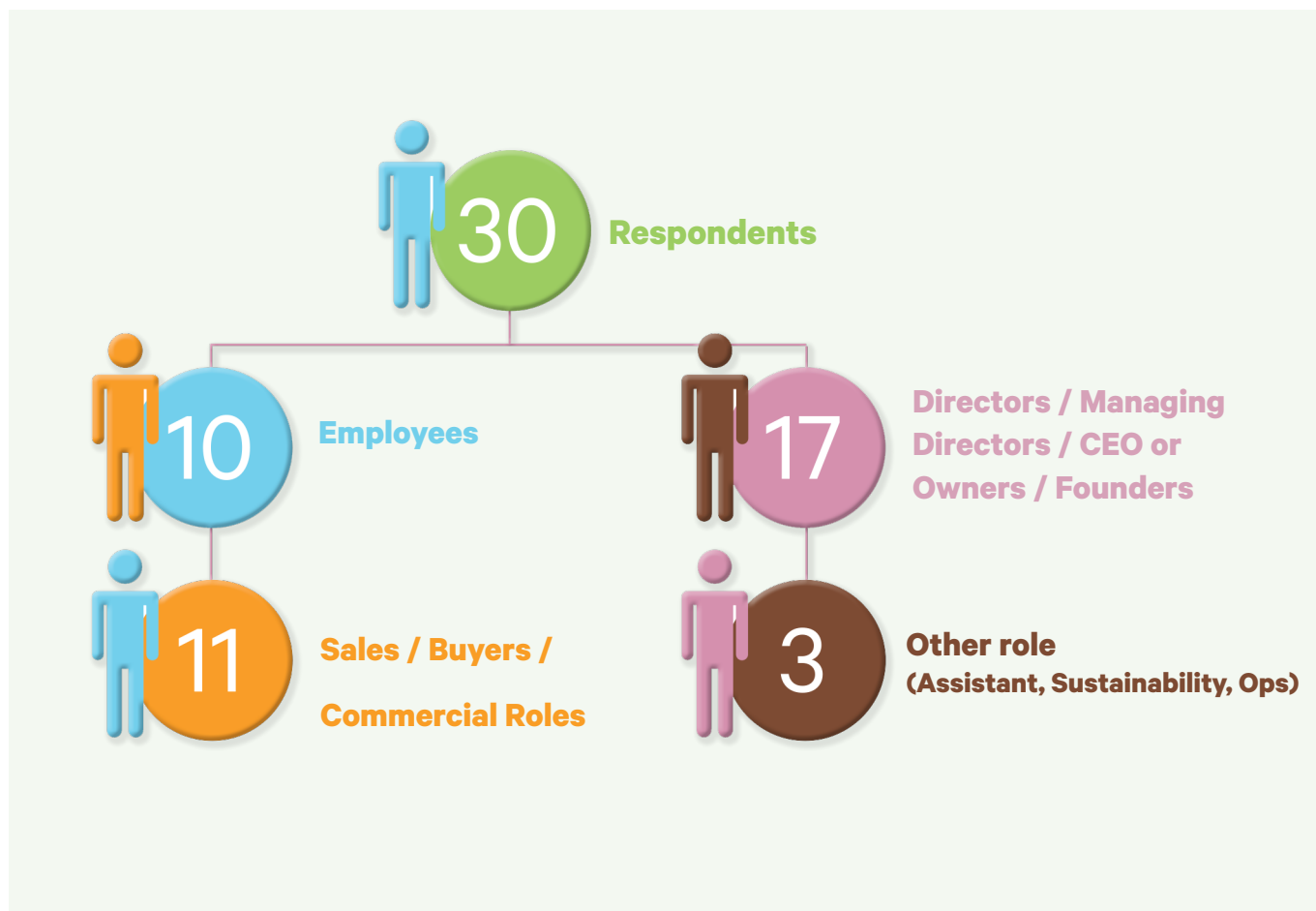
Key themes of findings include:

- Defining 'sustainable wine' and associated areas of the wine supply chain
- Levels of awareness and engagement in sustainability of wine
- Value of sustainability commitment and certification in driving sales and purchasing decisions
- Attitudes to alternative packaging
- Challenges, barriers and opportunities for improving sustainability

Who did we talk to?

Approximately 30 importers took part in the survey. Most respondents were either key decision makers or in commercial roles, and most represented small businesses of less than 10 employees.

(See Methodology chapters for more details.)



1

DEFINING 'SUSTAINABLE WINE': WHAT DOES IT MEAN TO IMPORTERS?

The survey questioned respondents on their understanding of 'sustainable wine'; this question was asked in the same format for each cohort across the four surveys so that we could easily compare answers. In the case of importers, we also asked related questions about the most closely associated areas of the wine supply chain.

What did we ask?



How do importers **best define their company's understanding of 'sustainable wine'**? Respondents were given a number of terms with the option to agree with strongly or moderately, disagree with or indicate uncertainty.

And which areas of the wine supply chain do importers associate most with sustainability?

What did we learn?



There was relatively high agreement amongst the importers with very strong support overall for most of the suggested terms. This shows both alignment in their thinking and a recognition of the breadth in meaning covered by an understanding of 'sustainability' in wine terms.

Key terms of definition

The **key terms** that importers identified as central to their company's understanding of 'sustainable wine', listed here in order of strong agreement and with high overall agreement, were:

- **regenerative farming** (82% strongly agree + 18% moderately agree = **100% agree**)
- **environmentally friendly** production (79% + 18% = **97% agree**)
- **socially responsible** labour practices (79% + 15% = **94% agree**)
- **carbon neutral or low-emissions production** (65% + 29% = **94% agree**)
- **organic** farming (62% + 35% = **97% agree**)
- **energy efficient** or low-emissions **packaging** (62% + 35% = **97% agree**)
- **biodynamic** farming practices (47% + 50% = **97% agree**)

All other terms had some level of disagreement or uncertainty, most notably:

- **certified/accredited** as sustainable, 76% overall agree + **24% disagree**, 0% don't know
- **low air miles**, 70% agree + **20% disagree**, 9% dk
- **natural** or additive-free, 62% agree, **35% disagree**, 3% dk
- **vegan**, 53% agree, **38% disagree**, 9% dk
- **no added sulphur**, 41% agree, **50% disagree**, 9% dk



There was full consensus for the role of regenerative farming amongst all importers, which is notable, and almost no disagreement or uncertainty regarding environmentally friendly production, organic or biodynamic farming practices and carbon neutral or low-emissions production (all contained within IWCA's definition of Scope 1 in terms of GHG emissions), and also energy efficient or low-emissions packaging (Scope 3).

Socially responsible labour practices had minimal levels of disagreement or uncertainty (3% each).

Disagreement was highest around natural wines and additives including sulphur and fining agents (vegan), which were the most divisive, but also relatively high around the need for accreditation and the impact of air miles.

In general, there was very little uncertainty – this is a confident cohort – with the exception of the impact of air miles, vegan wines and added sulphur.

Importers' responses to the definition of sustainable wine	Highly Agree	Moderately Agree	Overall agreement	Disagree	'don't know'
Regenerative farming practices	82.4%	17.7%	100.0%	0.0%	0.0%
Socially responsible labour practices	79.4%	14.7%	94.1%	2.9%	2.9%
Environmentally friendly production	79.4%	17.7%	97.1%	0.0%	2.9%
Carbon-neutral or low-emissions production	64.7%	29.4%	94.1%	5.9%	0.0%
Energy-efficient or low-emissions packaging	61.8%	35.3%	97.1%	2.9%	0.0%
Organic farming practices	61.8%	35.3%	97.1%	2.9%	0.0%
Biodynamic farming practices	47.1%	50.0%	97.1%	2.9%	0.0%
Certified / accredited as sustainable	35.3%	41.2%	76.5%	23.5%	0.0%
Low air-miles	29.4%	41.2%	70.6%	20.6%	8.8%
Natural or additive-free wine	20.6%	41.2%	61.8%	35.3%	2.9%
Vegan	17.7%	35.3%	52.9%	38.2%	8.8%
No added sulphur	5.9%	35.3%	41.2%	50.0%	8.8%

Further insights

When invited to suggest further elements that they would include in a definition of their company's understanding of 'sustainable wine', the following themes arose:

These statements reflect that Irish wine importers have a **broad, multidimensional understanding of sustainability**, focusing not only on viticultural practices or consumer-facing certification but also on emissions, logistics, packaging, education, community, business practices and longevity.

THEME	MEANING/SIGNIFICANCE
Whole-of-supply-chain thinking	Sustainability isn't isolated to vineyards; every touchpoint matters.
Circular and refill systems	Innovations like tap wine and recycling systems help reduce packaging waste.
Local/regional sourcing	Reducing transport emissions by selecting local suppliers.
Consumer engagement	Education and transparency are central to empowering sustainable choices.
Community responsibility	Social sustainability encompasses the involvement of local people and their traditions.
Business travel & logistics	Companies are reviewing internal practices to reduce their own emissions, including local delivery practices, commutes and international travel.
Financial sustainability	The future of wine businesses hinges on striking a balance between profits and sustainable practices.
Media ethics and education	Accurate media representation is seen as vital in shaping consumer understanding.

Worth noting

Many of these relate to out-of-sight back-end practices and highlight the manifold efforts needed to make systemic changes that would likely go unnoticed (and therefore unappreciated) by consumers or even trade. Real sustainability goes far beyond selling points on a label, as well far beyond the vineyard itself, and may invite the questioning and potential restructuring of well-established business practices such as regular air travel for the sourcing and selling of wine, amongst others.



And so?

Related considerations for businesses, either individually or collectively:

- How much of their sustainability efforts are driven by customer demand and perceived ‘payoff’ in terms of sales?
- How much by a desire to ‘do the right thing’ whether to meet informal company values or formal Corporate Social Responsibility targets?
- How much is the need to evolve and adapt for their business to survive and hopefully thrive?

It might be useful to consider where these drivers potentially overlap and also where they contradict each other. What would it look like to respond proactively rather than reactively regarding these various elements of sustainability in wine? How might that be in the future business?

Focus on: Associated wine supply chain areas

When asked which areas of the wine supply chain they associate most with sustainability, respondents rated these in the following order. **The author has included some individual ‘worth noting’ observations for each.*

1. Vineyard practices are most closely associated with sustainability by importers (85% rate them as of core relevance).

**This is perhaps unsurprising: these practices are not only central to the wine’s immediate environmental impact but also to the wine story, and are easily communicated through imagery and storytelling regarding biodiversity, cover crops, irrigation, inputs etc.*

2. Winery operations are also closely associated (63% rate them as of core relevance).

**These are more technical and therefore harder to communicate, but also prime for storytelling in terms of practices such as energy efficiency. It is also the site of some divided opinions regarding contested factors such as safe or acceptable levels of sulphites.*

3. Climate impact/emissions are rated of core relevance by 59%.

**This is somewhat of a cover-all that applies across the other place-based areas, but it’s notable that respondents didn’t give this their top rating.*

4. Packaging is rated core relevance by 53%.

**While not romantic, this is one area that all respondents have potential agency over. This is especially significant given that wine packaging is a winery’s single biggest contributor of GHG emissions related to the production, sale and consumption of wine (at 29% of all emissions, [ref IWCA GHG Hotspots Map] – or 52% if you include associated transportation).*

5. Labour rights and social equity are rated of core relevance by 47%.

**This relatively low rating perhaps reflects how little these social responsibility elements are discussed and communicated as part of a wine’s story, with the exception of specific geo-contexts requiring redress (such as South Africa, where Wine and Agricultural Ethical Trade Association accreditation was developed to assure the consumer of social equity).*

6. Transport/logistics are rated of core relevance by 44%.

**Again, this is one of a winery’s main contributors to GHG emissions (case goods transport to distributors and consumers accounts for 17% emissions, employee commute 1.6%, business travel including air travel 1%), yet is rated fairly low here – perhaps because they are seen as standard elements that apply to the importation of all wines.*

7. Certifications and accreditations are rated of core relevance by just 12.5%.

**It’s notable that these are the elements of the supply chain that importers associate least with sustainability, in contrast with consumers and buyers. This also had the highest number of ‘not relevant’ ratings from respondents, at 9%.*

Worth noting

The overall trend of these ratings reflects the greater emphasis placed by respondents in their definition of sustainability on Scope 1 versus Scope 2 or 3 in terms of carbon emissions.

Further insights

When importers were invited to comment further and identify other areas of the wine supply chain that they associate with sustainability, three main themes came out of the comments.

Theme 1: Environmental Sustainability Across the Supply Chain

In parallel with the understanding of sustainability reflected above, respondents' comments do highlight sustainability efforts that span farming, production, transportation, packaging and recycling. Some of these companies are working to reduce their own emissions through local sourcing, optimising travel and delivery logistics, and implementing circular recycling systems.

"Sustainability touches every stage of the supply chain..."

"Sourcing wines from neighbouring European growers helps to cut down on transport emissions."

"We are focused on reducing our impact, both by reducing travel... [and] using new tools to optimise deliveries."

Theme 2: Consumer Education, Transparency & Communication

A recurring theme is the importance of educating customers and providing transparency about sustainability practices. There is also an explicit call for the media to communicate responsibly so that consumers clearly understand the efforts being made (and an implied need perhaps for education of media, along with other stakeholders in the Irish wine sector).

"Consumer education & transparency."

"Media responsibility – journalists to ensure they are accurately reflecting... so that the consumer is well informed."

Community & Social Responsibility

Beyond environmental impact, responses highlight the role of businesses in engaging with their own local communities and promoting broader social responsibility. This includes supporting community initiatives and considering financial sustainability.

"Community engagement."

"Financial sustainability."

Worth noting

Regarding the observation that sourcing wines from neighbouring European growers helps to cut down on transport emissions, this is a common understanding but one that is challenged or at least complicated by existing research regarding food miles (see introduction). It's notable that the impact of air miles is one of the highest areas of disagreement amongst importers, and that consumers say that country of origin is not a strong driving factor when considering their wine purchases.

Irish wine industry representatives listen to the panel of experts discuss the relevance of sustainability credentials at the launch of the Sustainability & Wine in Ireland report, 03 March 2026



2

AWARENESS OF AND ENGAGEMENT WITH SUSTAINABILITY



Various questions probed importers' awareness of and engagement with sustainability. Importers show strong awareness of and strategic commitment to sustainability but face gaps in certification familiarity, staff training, and access to reliable carbon emissions data.

What did we ask?



Do importers know and care about sustainability, and to what extent?

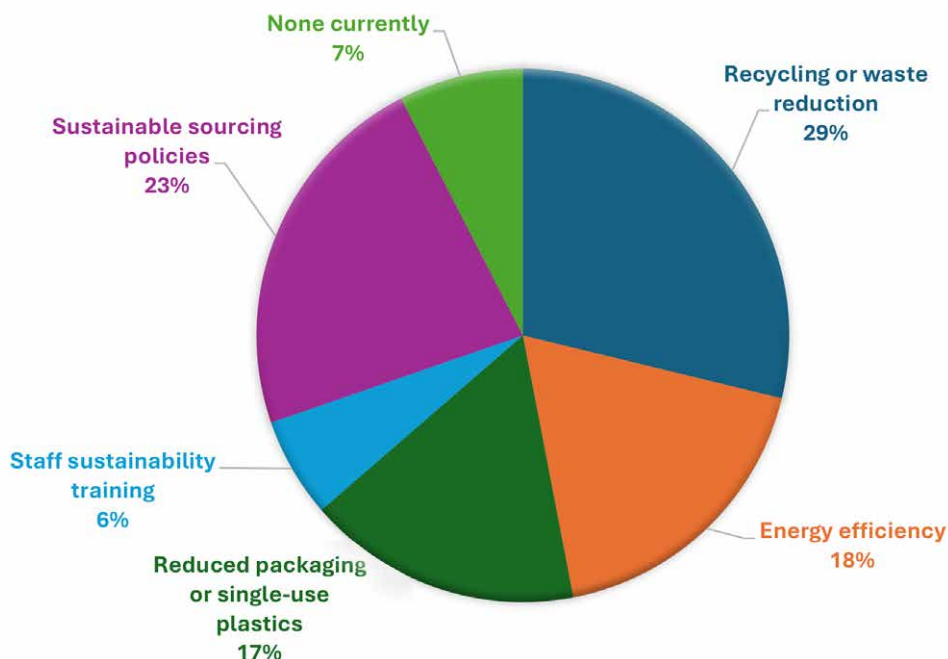
Respondents were questioned on their company's overall awareness of sustainability issues in the wine industry, familiarity with certification schemes and internal sustainability-related initiatives. Respondents were also asked specifically about regenerative viticulture, which was included unanimously in importers' definition of sustainable wine, and on emissions and carbon footprint.

What did we learn?



- A majority of respondents (81%) rate their company's overall **awareness of sustainability issues** as high or very high.
- Organic, biodynamic, fair-trade and regenerative viticulture are the most **familiar certification schemes** amongst respondents and their colleagues, with significantly lower familiarity with schemes such as LIVE, LEED and bee-friendly certifications.
- All respondents report sustainability as a factor in their overall **company strategy**, with almost half rating it as an important consideration, and almost one third as a core value.
- Most report some **internal sustainability-related initiatives** with only 16% having none within their businesses. Common to many businesses were: recycling waste reduction (61%); sustainable sourcing policies (48.5%); and energy efficiency (39%). Staff sustainability training was low at 13%.

SUSTAINABILITY-RELATED INITIATIVES WITHIN IMPORTERS' BUSINESSES





Further insights

When invited to comment further, other internal practices identified include:

Sustainable Logistics & Distribution: Initiatives to reduce carbon footprint through logistics are noted, such as using bicycles for deliveries. These approaches directly address emissions while reinforcing sustainability values.

Renewable Energy Adoption: Respondents mention shifting towards renewable energy sources to power operations, with solar-powered warehouses as an example. This reduces dependency on fossil fuels and aligns with broader carbon-reduction goals.

Recycling & Circular Systems: Closed-loop recycling initiatives, such as reusing and recycling packaging (e.g., keykegs), are implemented to reduce waste and promote circularity within the supply chain.

Related questions

Other related questions focus specifically on Regenerative Viticulture, and Emissions and carbon footprint.

Focus on: Regenerative Viticulture

There is an overall desire by importers to encourage and support regenerative practices. Over half report it as something their partners already practise and promote. Only one fifth deem it irrelevant to their listing decisions, with over **40% seeing it as a positive influencing factor in selecting or listing a winery**, and the same number agreeing that it should be encouraged through discussions with suppliers, wineries and trade partners.

However **25% of respondents said it was confusing to customers** and 20% felt they themselves 'don't know' enough about (but are keen to learn more), highlighting the need for education in the practice.

Focus on: Emissions and carbon footprint

The majority of respondents (nearly three quarters) feel that **as a business, they are well informed** regarding the carbon footprint associated with the wines they import. Almost as many proactively consider transportation modes (e.g. sea vs. air vs. road) as a sustainability factor when choosing wines to import.

A similar number (c. 60%) feel that **their wine suppliers are also well informed** regarding the carbon footprint associated with the wines they sell, although most disagreed with the statement that "[o]ur wine suppliers provide us data regarding the carbon footprint associated with the wines they sell us".

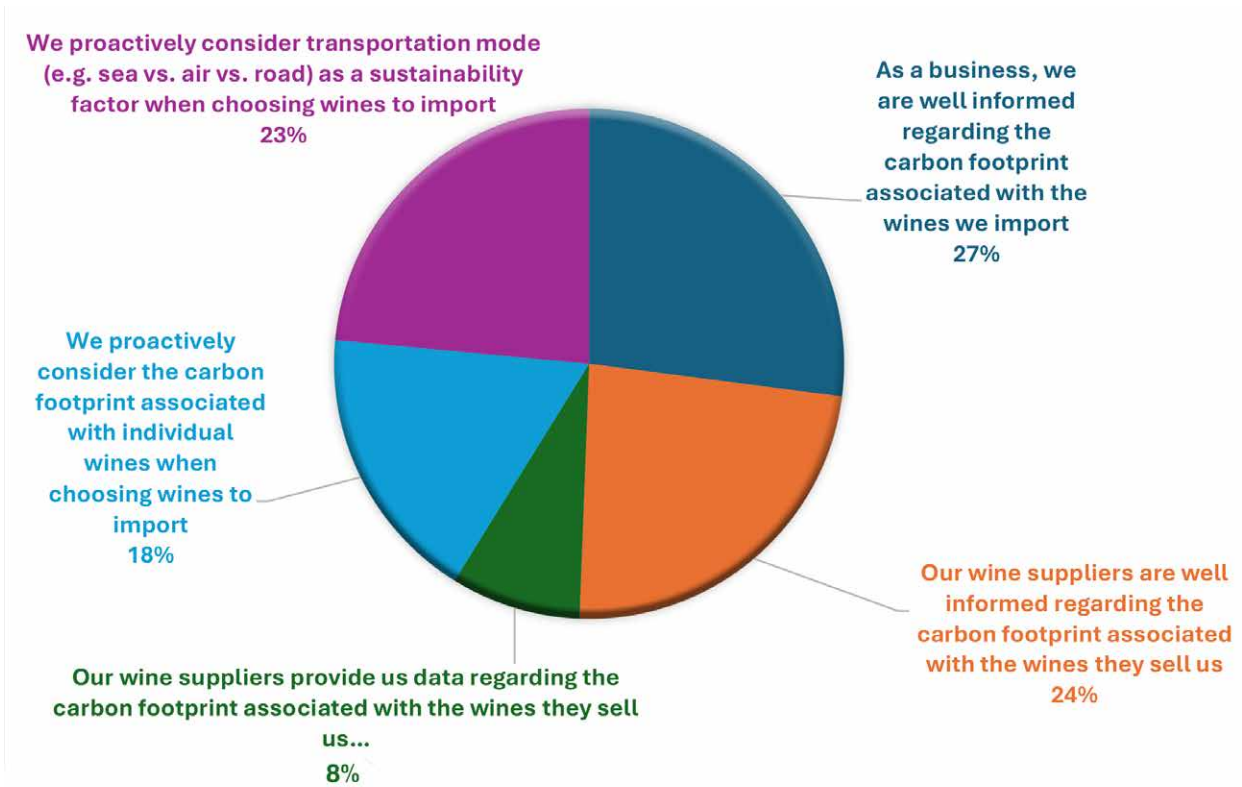


Worth noting

This gap in verifiable data (see previous page) is arguably linked to the burdensome cost of measurement and certification to smaller producers in particular, as highlighted elsewhere in relation to the prohibitive costs associated with sustainability accreditation for smaller producers.

However it also raises questions about the potential fallibility of decisions and attitudes that are not data-based, and the risk of common misperceptions such as those around the carbon footprint of 'food miles' being perpetuated.

PROPORTIONAL SUPPORT FROM IMPORTERS FOR STATEMENTS REGARDING CARBON FOOTPRINT



3

COMMERCIAL VALUE OF SUSTAINABILITY IN WINE

Sustainability increasingly influences purchasing decisions for importers and their customers, although with contrasting emphasis given to accreditation, and shaped by enduring priorities of quality, value and market demand.

What did we ask?



Do sustainability practices and accreditation **influence purchasing decisions** of importers and do their sustainability commitments **drive sales**?

Further insights

When invited to comment further on this influence, certain themes emerged.

Theme 1: Certifications vs. Broader Sustainable Practices

Many respondents value organic, biodynamic or sustainable certifications (e.g. Demeter, HVE, SNQIP, etc.) as evidence of commitment.

However, there is a strong view that **certification is not the only measure of sustainability**. Several respondents emphasise that actual farming and winemaking **practices**, such as low chemical use, biodiversity and resource responsibility, **matter more than labels**. Certifications are often described as ‘helpful for consumers’ but not the deciding factor.

Respondents also highlighted that **sustainability certifications and environmental impact reporting can be prohibitively expensive for small producers**. This barrier makes it harder for them to demonstrate their commitment despite sustainable practices.

“Certifications are a plus, but not a requirement. We trust the farmers we work with.”

Theme 2: Supplier Engagement, Selection & Delisting

Engagement with suppliers on sustainability is a recurring theme. Respondents describe regular conversations with producers about vineyard management, packaging, energy use and environmental responsibility.

Many highlight sustainability as a growing factor in supplier selection, with some delisting or declining to work with producers who don’t align with their sustainability values.

What did we learn?



Importers feel that their sustainability commitment is a consideration for their customers, but to varying degrees.

One third judge it a **key purchasing consideration of increasing importance** (with a small minority reporting that all their suppliers have sustainability-related certification), while almost half judge it somewhat influential as one of various considerations.

One third report that sustainability credentials always influence their own decisions to import a wine, while over half say it often or sometimes plays an influence.

Still, **commercial factors** (quality, price, heritage, consumer demand) remain **equally or more important** in decision-making.

“We actively encourage suppliers to share their sustainability practices and certifications.”

Theme 3: Quality, Scale and the Tension Between Sustainability & Business Realities

Several comments emphasise the need to balance wine quality with sustainability. Respondents often explicitly associate sustainable practices with high-quality wines, but also emphasise that **sustainability is not the primary purchasing criterion** - taste, heritage, value and reputation remain the leading factors.

Scale is also flagged as a challenge: larger monoculture vineyards and industrialised production are viewed by some respondents as threats to sustainability, both environmentally (chemical use and biodiversity loss) and socially (labour rights). Small and family-owned producers are viewed as more naturally aligned with sustainability.

“While sustainability has become a core factor... it is not the only factor, quality and value remain key in the decision tree.”

One further theme arises elsewhere in responses, notably when asked for final comments at the conclusion of the survey:

Theme 4: Balancing Cost, Pricing & Commercial Pressures

Respondents repeatedly highlight the tension between sustainability and cost pressures. Interventions would be welcome to address affordability, pricing structures and duty/tax impacts so that sustainable options remain commercially viable.

“The rate of duty is a massive imposition... this has got to be something to look at for inward tourism and sustainability of the on-trade.”

4 ATTITUDES TO ALTERNATIVE PACKAGING



Importers show cautious openness to alternative packaging as one sustainability solution – widely adopting lightweight glass and selectively trialling other formats – but uptake is limited by consumer demand and acceptance, quality concerns and technical limitations, cost and entrenched industry practices around presentation and tradition.

What did we ask?



What are importers' attitudes to alternative packaging and their stocking practices?

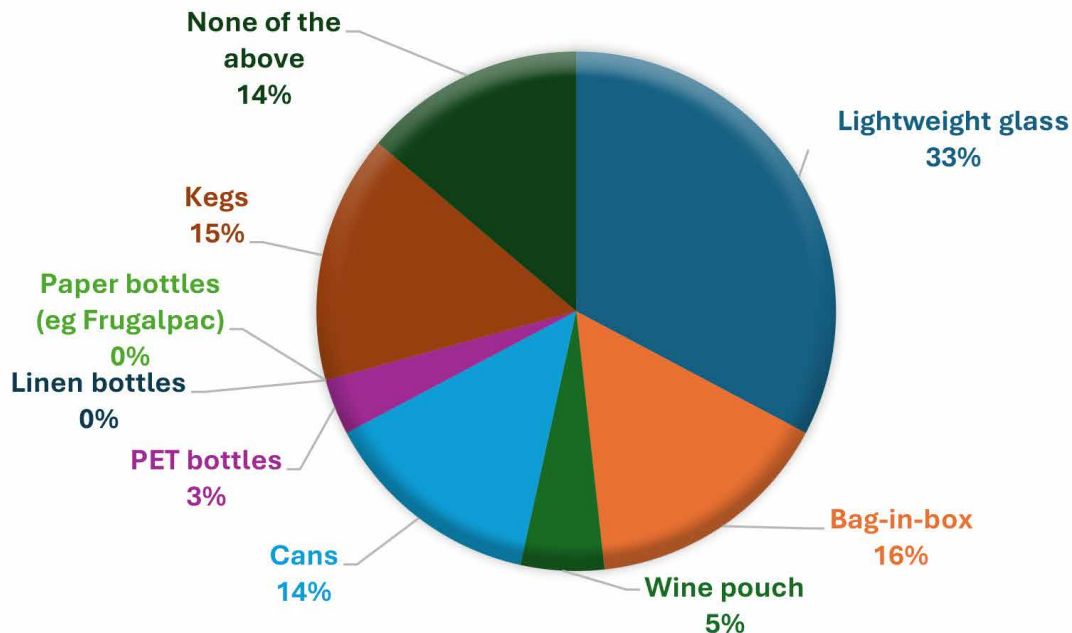
What did we learn?



Two in three importers stock light-weight glass bottles, followed in popularity by bag-in-box and kegs (one in three) and cans (one in four). Wine pouches and PET bottles were only stocked by a small handful and paper (e.g. Frugalpac) and linen bottles by none.

A quarter of respondents stock none of the alternative packagings listed.

ALTERNATIVE PACKAGING FORMATS THAT IMPORTERS STOCK



Further insights

When further observations were invited, the following themes emerged:

THEME 1: Openness & Interest in Alternative Packaging

Many respondents are already adopting or open to exploring alternative packaging (cans, bag-in-box, pouches, aluminium bottles, kegs). They see it as part of a sustainable offering and are interested in future innovations.

“We would consider shipping in kegs if the system was available to use by other suppliers.”

“We will be introducing aluminium bottles... in 2026.”

THEME 2: Market Demand & Consumer Acceptance

Comments note that **low consumer demand** is a barrier to adoption of alternative packaging – especially for fine wine, where tradition and perception play a strong role. Education of consumers is seen as critical for broader adoption.

“Alternative packaging types are not too popular in the market...”

THEME 3: Quality, Suitability, Cost & Technology Limitations

Respondents emphasise that alternative packaging must **protect wine quality and be technically suitable**. Some note that current technology is still catching up, especially for fine wine and in terms

of storage needs and durability, and that cost is an issue. Packaging is considered viable only if it preserves quality and delivers clear sustainability benefits.

“We would consider it – the majority of our suppliers don’t offer an alternative to glass; bag in box isn’t popular and orders usually arrive damaged.”

One more related insight arises in the final comments from respondents at the conclusion of the survey:

THEME 3: Industry Practices & Packaging Awareness

Respondents pointed to **over-packaging** “just for presentation” as a commercial practice that conflicts with sustainability principles. Interventions could focus on encouraging more conscious decisions in production, packaging and distribution.

“I hope the industry can strike a better balance, where commercial success goes hand-in-hand with environmental responsibility.”

5

CHALLENGES AND OPPORTUNITIES FOR IMPROVING SUSTAINABILITY



From importers' perspective, improving sustainability hinges on education, affordability and trust, with importers open to collaborative, practically focused industry action – provided it is inclusive, transparent and mindful of time and cost constraints.

What did we ask?



What challenges, barriers and opportunities were identified by importers regarding improving sustainability, and are they open to cross-industry collaboration?

What did we learn?



Some key themes emerged throughout the survey responses and in respondents' concluding comments.

Education is critical to both trade stakeholders and consumers to increase adoption of sustainable practices and choices.

Cost and pricing pressures are a major barrier; interventions could focus on affordability and tax/duty considerations.

Consumer awareness campaigns could target problematic industry practices like over-packaging or volume-focused sales.

Focus on: Consumer & Stakeholder Education

A major theme is the need to **educate** consumers, importers, suppliers and trade stakeholders about sustainability – its **meaning, benefits** and associated costs. Comments highlight confusion among consumers and a general lack of awareness in the trade. Education is seen as a key intervention to align commercial practices with sustainable choices.

“There is a definite lack of knowledge in what sustainability actually means – your idea to create a working group to educate stakeholders is important.”

Further insights

This theme of education also arose when importers were **asked what supports or tools would help** importers become more sustainable.

‘Knowledge and education’ was ranked the most important and welcome.

“Clear tools for helping consumers to understand the sustainability of wines from vineyard to glass.”

This was followed by a moderate welcome for support regarding **certification guidance, carbon measurement tools** and **supplier engagement help**, with the lowest demand being for **packaging innovation** and **policy or regulation clarity**.

“A more facilitating/dynamic approach to large format wine packaging in terms of duty and excise.”

Focus on: Cross-Industry Collaboration

While the majority have not previously collaborated with other importers, producers or retailers on sustainability initiatives, all but one either are open to future collaboration with others in the wine trade, including with competitors, to advance sustainability within the Irish wine sector – albeit half of those tentatively and with some conditions.

Worth noting

Packaging innovations are low on importers' agenda for improving sustainability. This can be interpreted in a number of ways – that they feel that the available packaging options are sufficient and that packaging is not a major problem for the wine sector; or that they feel that the available packaging options are sufficient but the challenge is their uptake and usage.

Further insights

When invited to comment further on **what would be needed to make future collaboration possible**, certain themes emerged:

THEME 1: Collaboration & Forums for Discussion

Many respondents emphasised the need for group meetings, open forums or think tanks to foster dialogue and practical problem-solving. Neutral facilitation and inclusivity were highlighted as important to ensure fairness and avoid dominance by a single company.

“Perhaps a think tank – this needs to be inclusive and not just ‘naturalistas’.”

“I believe in a collaborative approach led by a neutral chair, rather than having a single company dictate the direction.”

THEME 2: Transparency, Trust & Clear Communication

Respondents stressed the importance of open communication and information-sharing. They highlighted the importance of **transparency from suppliers** (e.g., vineyard and winery practices, packaging, carbon footprint) as well as **trust between competitors**, which is currently perceived as lacking. Without trust, respondents warn that collaboration risks being seen as self-serving.

“There is very little trust between competitors... there would need to be a very clear goal and transparent motives for companies to work together.”

“A communication channel (Slack, video calls, private LinkedIn/WhatsApp group, email/newsletter) + clear group structure/purpose/goals.”

A panel of experts discuss how best to communicate with consumers on sustainability at the Sustainability & Wine in Ireland report launch, 03 March 2026

THEME 3: Practical Focus (Packaging, Logistics & Data)

Several responses emphasised that interventions should focus on **practical, measurable sustainability improvements** — such as lighter bottles, recyclable packaging, direct shipping models, logistics coordination and data traceability (including carbon footprint and transport impact). Respondents want **actions, not talk**.

“A group forum working at logistics, not PR, level.”

Beyond these common themes, some respondents noted additional barriers and opportunities.

THEME 4: Resources, Time & Cost

Some respondents noted limited capacity to engage, citing time pressures, size of team or the need to balance sustainability with financial constraints. They are open to interventions, but only if the costs (time and financial) are manageable.

“A sustainability benefit but not at a huge cost.”

“We are always open but capacity is limited.”

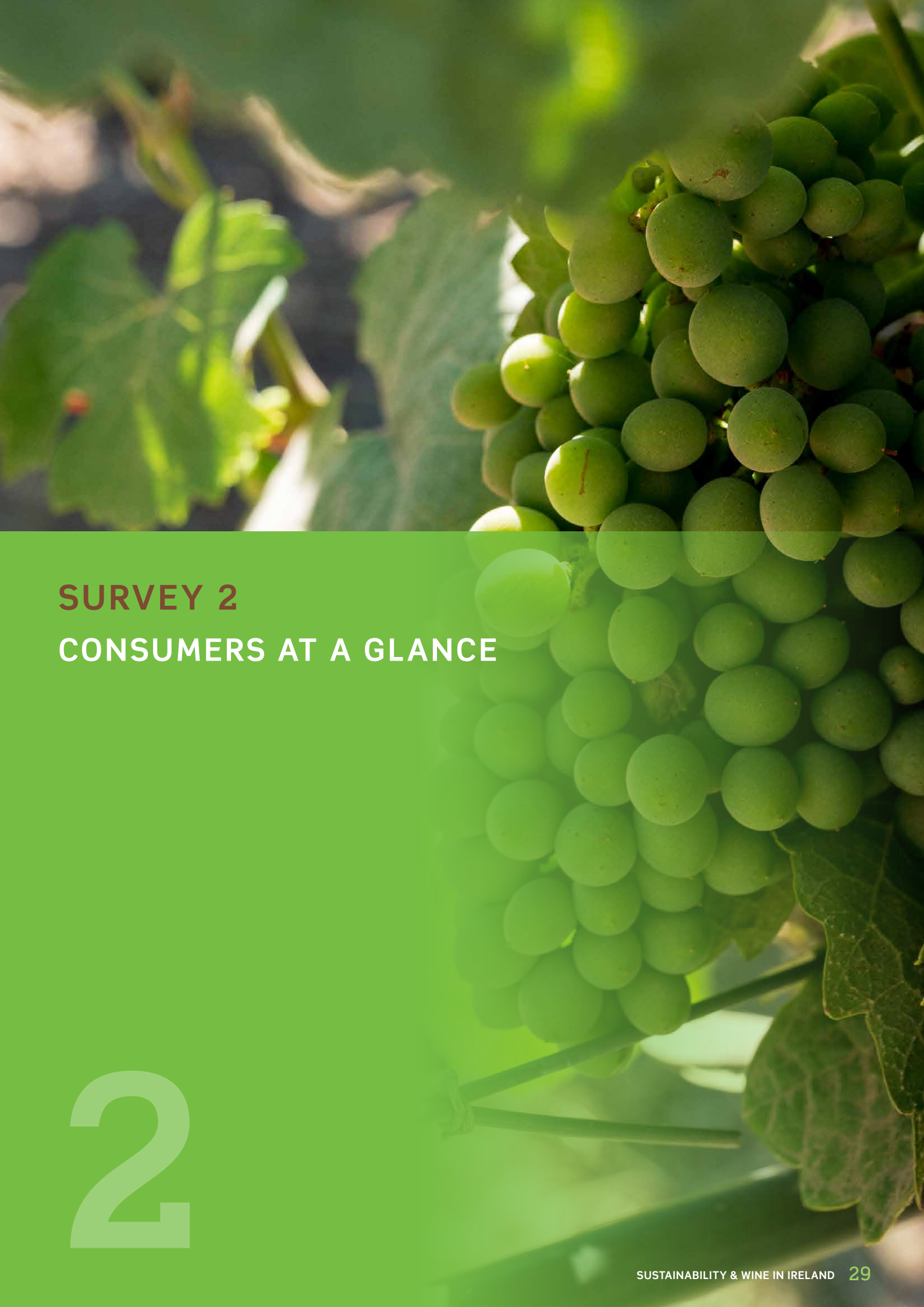
THEME 5: Broader Industry Collaboration & Leadership

Some suggested drawing on existing cross-industry efforts (like lobbying groups) or having interventions led by industry associations (e.g. Vintner Association) or neutral bodies. This reflects a desire for collective action that extends beyond individual companies.

“It may be possible to use the team that lobbied on the Health Labels to work on cross-industry sustainability initiatives.”

Charlie Vass of Vinca Wines talks about alternatives to glass at the launch of the Sustainability & Wine in Ireland report, 03 March 2026





SURVEY 2

CONSUMERS AT A GLANCE

2

CONSUMERS AT A GLANCE

Uneven understanding of 'sustainable wine'

Consumers understand the idea of sustainability, although their definitions are varied and uncertain. Organic and environmentally-friendly production are the most recognised terms, followed by social responsibility; 'vegan' credentials rate especially low in consumers' understanding of sustainability.

Sustainability matters, but moderately

Two in three consumers do consider sustainability (to some degree) when buying wine but not as a primary driver of purchases. They make sustainable choices when the budget allows, or for special occasions rather than as part of their daily choices.

Commercial value of sustainability

Sustainability labelling and certification influences wine purchases less than familiarity, novelty and value, and only 15% of respondents say certifications/logos would make them more likely to buy a wine. Consumers care more about enjoying their wine than any potential positive impacts on the environment or personal health.

Price sensitivity is nuanced

Consumers (~65%) believe sustainable wines cost more, but three in four are willing to pay extra, although amounts vary widely. Consumers are willing to pay more to feel like they're getting value. Price and promotions are incentives in purchases but not a barrier to choosing sustainable: understanding the value of those choices is a greater barrier.

Packaging awareness is low but lightweight bottles appeal

Few consumers actively consider packaging sustainability. Glass bottle weight is unknown as sustainability issue – and is an opportunity for an easy win, with over two-thirds saying that knowing a lighter bottle benefits the environment would make them more likely to choose it. Other alternative packaging have an appeal of convenience, including volume, portability and disposability; personal benefit is key.

Personal benefits drive behaviour

Personal benefits influence purchasing decisions (making life easier / enjoyment); the personal benefit for consumers of choosing sustainability could be the absence of pain (one less thing to feel bad about).

Effective sustainability communication needs simplicity

Consumers want clearer, simpler sustainability information and prefer visible, easily accessed and understood formats. The commercial value of sustainability is less as a driver of sales than a feel-good bonus and quality assurance. Outdated myths linger but could be flipped into new messages: for example, from 'heavy bottle correlates to quality wine' to 'lighter weight bottles reflects other sustainability-related commitments through the wine production and supply chain', aka 'lighter bottle correlates to quality wine'.

SUSTAINABILITY SURVEY 2: WINE CONSUMERS



The Irish Wine Consumer Sustainability Survey was designed to understand wine consumers' awareness, perceptions and behaviours related to sustainability in wine.

Key sections included:

- Consumer demographic and wine buying habits
- Awareness and understanding of sustainability in wine
- Effect of communications around sustainability in wine
- Attitudes to alternative packaging

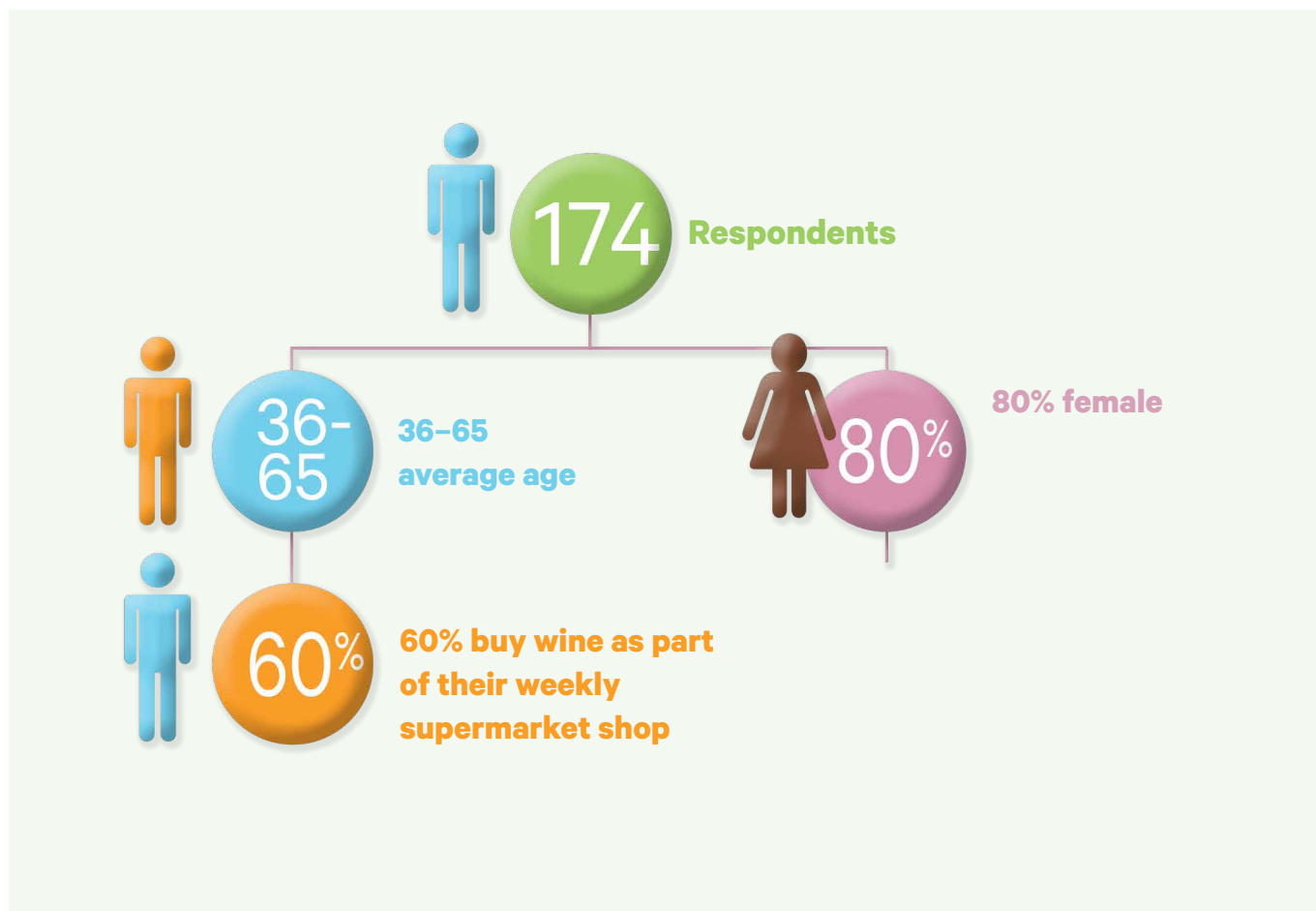
The objective for this survey was to gain insight into consumer wine buying habits and levels of knowledge and interest in terms of sustainability in wine, and to provide a sample survey of Irish consumers that could be compared with perceptions from wine importers, buyers and trade as well as with other consumer research from other markets, and could inform collaborative efforts to improve sustainability in wine.

Key themes of findings include:

- Defining 'sustainable wine'
- Levels of awareness of / engagement with sustainability of wine
- Commercial value of sustainability in wine
- Enticements to choose sustainable wines, including effective communications / price sensitivity
- Attitudes to alternative packaging

Who did we talk to?

174 respondents completed all questions. These consumers were predominantly women aged between 36–65 years old who buy wine weekly, mostly in supermarkets or sometimes in independent retailers, with a mixed degree of brand loyalty and open-mindedness to reflect this. (See Methodology chapters for more details.)



1

DEFINING 'SUSTAINABLE WINE': WHAT DOES IT MEAN TO CONSUMERS?

The survey questioned respondents on their understanding of 'sustainable wine', which proved **uneven in general though with a conservative confidence**. This question was asked in the same format for each cohort across the four surveys so that we could easily compare answers.

What did we ask?



How do consumers **best define their understanding of 'sustainable wine'**? Respondents were given a number of terms with the option to agree with strongly or moderately, disagree with or indicate uncertainty.

What did we learn?



There was **high disagreement** amongst consumers with **very divided support** overall for most of the suggested terms, indicating varied and uneven levels of understanding and knowledge about wine and related issues of sustainability.

Overall respondents were more likely to 'agree moderately' (38% average) than 'agree strongly' (18%), but more like to 'disagree' (28%) than to say they 'don't know' (16%). This suggests a conservative confidence in their knowledge.

Key terms of definition

More than half of consumers surveyed identified the following key terms, listed here in order of strong agreement and highlighted in green above, when asked what 'sustainable wine' means to them:

- **organic farming** (30.60% strongly agree + 43.17% moderately agree = c. **74% agree**)
- **certified/accredited as sustainable** (28.42% + 39.34% = c. **68% agree**)
- **socially responsible** labour practices (27.32%+37.16%= c. **64.5% agree**)
- **natural** or additive-free (24.59%+33.88%= c. **58.5% agree**)
- no added **sulphur** (20.77% + 32.79% = c. **53.5% agree**)
- **environmentally friendly** production (19.67% + 52.46% = c. **72% agree**)
- **carbon neutral** or low-emissions **production** (17.59%+45.90%= c. **63.5% agree**)
- **energy efficient** or low-emissions **packaging** (14.75%+48.09%= c. **63% agree**)
- **low air miles** (16.39%+37.16%= c. **53.5% agree**)

There are **high levels of disagreement and uncertainty** regarding the following terms, which less than half of consumers would include in their definition of sustainable wine:

- **regenerative farming** (11.48% + 32.24% = c.44% **agree**) + **28.5% disagree** + 28% 'don't know'
- **biodynamic/Demeter** (14.21% + 34.43% = c.48.5%) + **26.23% disagree** + 25.14% 'don't know'
- ***no/low sugar** (7.10% + 31.15% = 38.25%) + **43.17% disagree** + 18.58% 'don't know'
- **vegan** (4.92% + 27.32% = 32%) + **47.54% disagree** + 20.22% 'don't know'



Worth noting

*Note that we included 'no/low sugar' in the consumer survey as a red herring to act as a comparative barometer – it had reassuringly high levels of disagreement (43%) although not as high as vegan (47.5%), which itself had higher levels of disagreement amongst consumer compared to importers (38%).

Consumers' responses to the definition of sustainable wine	Strongly Agree	Moderately Agree	Overall agreement	Disagree	'don't know'
Organic	30.6%	43.2%	73.8%	19.7%	6.6%
Certified / accredited as sustainable	28.4%	39.3%	67.8%	18.6%	13.7%
Socially responsible labour practices	27.3%	37.2%	64.5%	22.4%	13.1%
Natural or additive-free wine	24.6%	33.9%	58.5%	27.3%	14.2%
No added sulphur	20.8%	32.8%	53.6%	31.2%	15.3%
Environmentally friendly production	19.7%	52.5%	72.1%	18.0%	9.8%
Carbon-neutral or low-emission production	17.5%	45.9%	63.4%	24.0%	12.6%
Low air miles	16.4%	37.2%	53.6%	29.0%	17.5%
Energy-efficient or low-emission packaging	14.8%	48.1%	62.8%	24.0%	13.1%
Biodynamic/Demeter	14.2%	34.4%	48.6%	26.2%	25.1%
Regenerative viticulture	11.5%	32.2%	43.7%	28.4%	27.9%
No/low sugar	7.1%	31.2%	38.3%	43.2%	18.6%
Vegan	4.9%	27.3%	32.2%	47.5%	20.2%





Further insights

Beyond the first-glance general patterns of strong agreement and disagreement, there are a few interesting points to consider.

- The top three elements with **most overall agreement** relate to sustainable (organic and environmentally friendly) and/or certified production practices, all of which sit within IWCA's Scope 1.
- **Socially responsible** labour practices saw strong support, rating fourth in overall agreement and with a high rating for strong agreement, at 27%.
- **Cellar-related** individual additives such as sulphur and non-vegan fining agents were **relatively low** in general agreement, yet the terms '**natural** or additive-free' had relatively high overall agreement (58.5%). The gap between these perhaps signal a general appetite for additive-free food and drinks but a lack of understanding of the technical processes of wine-making.
- There is **highest uncertainty** around biodynamic practices and regenerative viticulture, the sustainability impact of air-miles and vegan wines, and whether no/low sugar wines have any part in this conversation.

Worth noting

Potential areas for education include

- regenerative viticulture, especially given the high support amongst importers for its place in a definition of sustainability, and
- the complex relationship between the carbon emissions impact of air-miles vs sea-miles vs land-miles, and its relationship with bottle weight.

There could also be an opportunity to draw out stories of social equity and the inherent expense of responsibly made wine, given the stated interest in supporting socially responsible labour practices.

2

LEVELS OF AWARENESS OF AND ENGAGEMENT WITH SUSTAINABILITY



Most consumers (at least like to think that they) care about sustainability in wine, although price plays a part.

What did we ask?



When buying wine, how important is sustainability to consumers?

And have they ever intentionally bought a wine because of its sustainable labelling (organic, biodynamic, etc)?

What did we learn?



Almost a third of respondents (32%) say that they have never thought about sustainability when buying wine, and a very small number (4%) say that it was of no importance to them. That leaves nearly **two thirds (64%) who see sustainability as important to them to some degree when buying wine**, which seems a strong number to work with. However a large proportion of those (a full **half of all respondents) qualify it as 'slightly' or 'moderately' important.**

Over half of respondents (54%) say they have intentionally bought wine for its sustainability labelling (organic, biodynamic, etc), compared to 40% who haven't and 6% unsure. However most qualify that by saying they would do so **when budget allows (58%), or for a special occasion or gift (30%)**, rather than at every purchase (11%), indicating a **price sensitivity** amongst consumers and suggesting a **perception that sustainable wines cost more.**

Worth noting

The strong perception across all industry respondents was that consumers need more education or are not interested; however the above findings suggest that a large sector of them are interested – or at least like to consider themselves interested.

And so?

Even taking into account the phenomenon of 'social desirability bias' (whereby respondents in a survey say what they'd like to think they do rather than what they really do), that desire to be someone who considers sustainability in their wine choices is something that is there to be tapped into and appealed to – and is perhaps the hook for educating people further.

3 COMMERCIAL VALUE OF SUSTAINABILITY IN WINE

Sustainability credentials on the label have a **moderate influence** on wine purchases but **less than other factors like familiarity, novelty and value**. An enjoyable wine experience is of greater concern for consumers than any potential positive impacts on the environment or personal health.

What did we ask?

To what degree do sustainability values, practices and accreditation influence purchasing decisions of consumers and where do they fit in with other driving factors and influences on their wine purchases?



What did we learn?

Sustainability on the label **does not feature highly** when placed within a broader context of various driving factors and influences on their wine purchases – despite seeing earlier that the consumers at least like to think that they care about sustainability. Factors such as familiarity, novelty and price play greater roles in purchases.



For example, when given a choice of selecting three from several statements that characterise how they buy wine, one of the respondents' lowest choices was 'I look for certifications or specific values (e.g., vegan, organic, etc.)' at just 12%. Instead they prefer to buy

- **what they know and trust** ('I usually stick to familiar brands or styles', 41%), or
- **at a good price** ('I often buy based on price or promotions', 36%), while still staying
- **open to something new and interesting** ('I like trying new wines and reading labels', 53%).

Sustainability **certifications or logos** have a moderate influence on purchases. They are ineffective for one in four (25%), who either say that seeing a sustainability certification or logo on a label wouldn't influence them or that they don't read labels that closely. However 60% say it might influence them, but depending either on the certification (one third of that 60%) or on the wine (two thirds). Only a small minority (15% of all respondents) say that certifications or logos relating to sustainability on the label would make them more likely to buy that wine.

In a separate question, **guaranteeing the enjoyment of the wine** itself rates higher than either the certification or impacts of sustainability.

Asked what would encourage them to choose a sustainable wine:

- the top factor is **taste**, indicating that it's important for consumers that sustainability does not compromise taste or quality, and also that correlating sustainability with quality could be a high influencing driver of sustainable wine sales.
- Next in influence is a **recommendation** from a friend or expert, indicating the importance of word of mouth, social media and traditional journalism, but also the influence of customer-facing staff (sommeliers, waiters, bar staff) and retail experts (whether supermarkets buyers and quotes from related experts in a multiple retail setting, or recommendations from sales assistants or wine merchants themselves in an independent retailer).
- Clear **labelling** or **certification** ranks third followed by positive impacts on the environment and health.
- Price (or specifically 'Same price as non-sustainable wine') was rated the lowest, before 'Nothing would influence me'.

When asked to identify what sustainability terms, if any, they would **look for when reading a wine label** to choose a wine, their responses very closely mirrored their previous definition of

sustainability, with general support for organic farming, sustainable certification/accreditation, socially responsible labour practices, natural or additive-free, no added sulphur, environmentally friendly production, carbon neutral or low-emissions production, energy efficient or low-emissions packaging and low air miles, in that order. It's notable that carbon emissions and air miles are low on their agenda, both here and in their general definition / understanding of sustainability.

Finally, while a wine's country of origin is sometimes a purchasing influence for sustainability reasons, most haven't thought about it. When asked if a wine's country of origin would influence their purchase for sustainability reasons, most respondents strongly agreed with one of the two 'no' responses: 'No, I really haven't thought about it' (43%) and 'No, I am more interested in how it was produced than where' (33%) with significantly fewer choosing 'Sometimes, but for different reasons depending on the country' and a minority choosing 'Yes, I always try to buy as local as possible in food and beverage choices'.

This reinforces the above implication that **consumers are not thinking about emissions-related implications of transportation,**

- which can be seen as both a barrier (not on their radar so they don't care) and an opportunity (no preconceived ideas to turn on their heads).



The Sustainability & Wine in Ireland report shows that consumers place a high value on organic certification

Worth noting

The low rating for positive impacts on both the environment and health reflect that these are longer-term benefits that don't tend to drive sustainable choices with the same impact as immediate benefits such as knowing you're buying an enjoyable wine. This is supported by two key research insights from *Beyond Brands: Why People are Key to Sustainability*, a 2023 Ogilvy report on consumer behaviours and barriers to change.

That first insight is that 'selfish sustainability' framing works. Consumers are more likely to act when they see personal benefit alongside broader environmental benefit, or 'near' vs 'far' benefit. Highlighting what's in it for them, today, is important in influencing choices.

The second insight is the related point that consumers perceived trade-offs (such as in price, taste, complexity) when making sustainable choices. Many consumers assume that sustainable products cost more, are less effective (or in this case, less flavourful), or are harder to find.

And so?

Are there ways of helping consumers turn outdated thinking on its head? For example, rather than associating sustainability with a compromise or penalty in terms of lower quality or higher cost, can they be encouraged to correlate sustainability with higher quality or better value as drivers of sustainable wine sales?

4

ENTICEMENTS TO CHOOSING SUSTAINABLE WINES, INCLUDING COMMUNICATIONS AND PRICE

More information about sustainability is welcome to consumers if it's easily visible and easy to understand. Price alone is not a very strong enticement to choose sustainable wines, though a sense of value is.

What did we ask?



Would it be helpful to consumers to have more information about sustainability practices on the wine label? What is the most effective way for a wine brand to communicate its sustainability to them? And does price matter?

What did we learn?



Most consumers (93%) agree it would be helpful to them to have more information on the wine label about sustainability practices but half of them qualify that an easily understood explanation is important. Those surveyed rated the below choices in the following order as being the most effective way for a wine brand to communicate its sustainability to them:

- labels or stickers on the bottle (which makes sense given we are mostly surveying supermarket shoppers),
- shelf tags or in-store signage,
- QR codes, or
- websites or social media.

Information that is immediately accessible is preferable to requiring the consumer to seek it out.

Worth noting

The age profile of our respondents is worth remembering: at mostly over 36 years of age we're looking at Millennials, Gen X and Boomers rather than Gen Z, and an online engagement might resonate more with a younger generation.

Focus on: Price sensitivity

A majority of these consumers (65%) believe that sustainable wines tend to cost more, although nearly a quarter (24%) said they weren't sure.

There is a divide regarding whether they would pay more for the social good of buying sustainable wine.

Nearly **three in four are willing to pay extra** for a certified sustainable wine option, whether up to 50c (just 3%), €1 (12%), €2 (32%), €5 (29%) or more (7%).

A significant minority (17%) would accept no price increase.

Worth noting

Approximately **one third of respondents are price sensitive**, if we frame that as being either unwilling (or unable) to pay anything extra for a sustainable wine, or no more than an extra €1 on a bottle. Nearly one third would be willing to pay between €1–€2 extra, and another third upwards of €2.

However it's worth remembering that we have seen some **nuance around price sensitivity** in consumers' answers elsewhere. For example, having the same price as a non-sustainable wine factored the lowest in terms of encouraging consumers to choose a sustainable wine (they were more concerned about what the wine would taste like). And while consumers often bought based on price or promotion, guaranteeing an enjoyable wine experience was more important.



And so?

While affordability can be a barrier, and a good price can be an incentive to buy a particular wine, **price alone is not a very strong enticement** to choose sustainable wines. A sense of **value** is a greater driver than bottom line price, and appealing to the consumer's quest for an **enjoyable wine experience** is key.

Perhaps the strong sell then is one in which the appeal of choosing a sustainable wine is supplementary and complementary to the appeal of choosing an enjoyable wine; it's a **feel-good bonus** rather than the main attraction. And perhaps it's worth considering that the **true value of clear and simple messaging** and labelling around sustainability goes beyond whether or not it drives sales themselves, but is also **tied into improving the overall positive experience** of the wine with associated behaviours such as repeat sales.

5 ATTITUDES TO ALTERNATIVE PACKAGING

Questions around the sustainability of packaging are not **high on the minds** of the consumer, although they are most **open towards lightweight bottles**, especially when a positive impact on the environment was known to them.

Other alternative packaging such as **bag-in-box, pouches and cans** have appeal but mostly within specific contexts of personal convenience, including volume, portability and disposability.

What did we ask?



- What are consumers' attitudes to alternative packaging?
- Do they consider the environmental impact of a wine's packaging?
- Which alternative packaging formats are they likely to opt for, when and why?
- Do they associate heavier bottles with better quality wine, and would knowing a lighter bottle was better for the environment make them more likely to choose it?

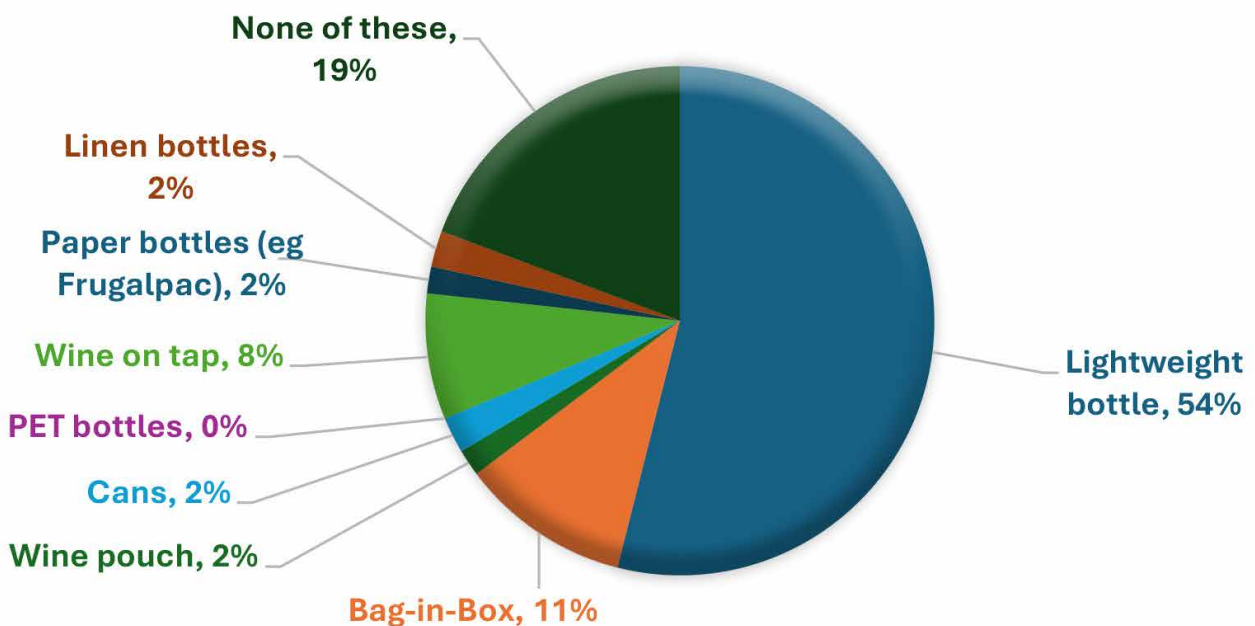
What did we learn?



Packaging is not very high on the mind of the consumer. A **majority** of 29% of respondents **rarely consider the environmental impact** of a wine's packaging, while 28% sometimes do. The question has never occurred to almost a quarter of respondents (24%) while less than 20% say that they often or always consider it.

If they were to purchase wine in any alternative packaging format, **lightweight bottles** would be the **most popular** (similar to industry respondents), followed in descending order by bag-in-box, wine pouch and cans. PET bottles, wine on tap, paper bottles or linen bottles were lowest in ranking.

CONSUMERS' RANKED NUMBER 1 ALTERNATIVE PACKAGING CHOICE





Focus on: Environmental impact of glass and correlation with quality wine

International research from SWR's Bottle Weight Accord points to a common industry perception that consumers associate heavy bottles with better quality wine, and would be reluctant to buy lighter bottles. However SWR points out there is weak evidence to support this. (See introduction for more details.)

Our survey asked Irish consumers: 'Does a heavier bottle typically mean a better quality wine?' This was one of the only times we asked consumers an open text answer, in order to give us some more nuanced, qualitative answers.

So what did they tell us?

Over **two thirds** of respondents **do not believe that bottle weight** directly **correlates with better wine** quality, with 106 out of 178 respondents answering a straightforward no.

A small minority (about 1 in 8) have never thought about it. A similar small minority said yes, heavy bottle weight correlates with better wine quality – but a third of those were tentative ('yes in general', or 'traditionally yes'). Others were unsure ('not typically', 'not always').

The more nuanced answers however suggest a perception of bottle weight that is influenced by tradition or aesthetics, linking bottle weight to tradition, quality of presentation, or specific cases of classic wine styles.

Certain themes emerged:

Some of the answers do acknowledge a **lingering positive association** between heavier bottles and perceived quality.

"I have heard it mentioned before but it's not my experience"

"Not necessarily but I would imagine that if the producer is not scrimping on bottle quality, then the wine will be superior too"

This arises even among those who explicitly deny any direct correlation.

"I know it doesn't, but it feels like it!"

"No but it's still more satisfying to pour from"

Some see heavy bottles as clearly unsustainable.

"Used to, but now it indicates a lazy producer and lazy retailers who are not asking them to change from this unsustainable practice"

Others have full faith in the sustainability of recycled glass.

"Heavier is only needed for sparkling wines. But glass is infinitely recyclable"

Worth noting

A strong majority (59%) say **that knowing a lighter bottle was better for the environment would make them more likely to choose it, with a third (36%)** less sure but saying it might do so.

And so?

There is room for education here to address these lingering associations and outdated misconceptions, and to enlighten consumers about the complexity of recycling glass as a high-inputs process with high GHG emissions, and also regarding the direct association of the transportation of heavier bottles with GHG emissions.

One approach might be to **frame it as a positive action** that is being taken by wine producers, importers and trade and that can be **easily supported by consumer choice**.

Perhaps it is time for a new message?

There is an opportunity here to turn on its head the assumption that

“if the producer is not scrimping on bottle quality, then the wine will be superior too”

and instead encourage consumers to think

“if the producer is showing a commitment to sustainability through their proactive choices on bottle weight, then that reflects other quality-related decisions being made through the wine production and supply chain”.

Further insights

Looking beyond bottles and glass, there are certain kinds of **occasions** when alternative (non-glass) packaging has a strong appeal, and key themes emerged behind these.

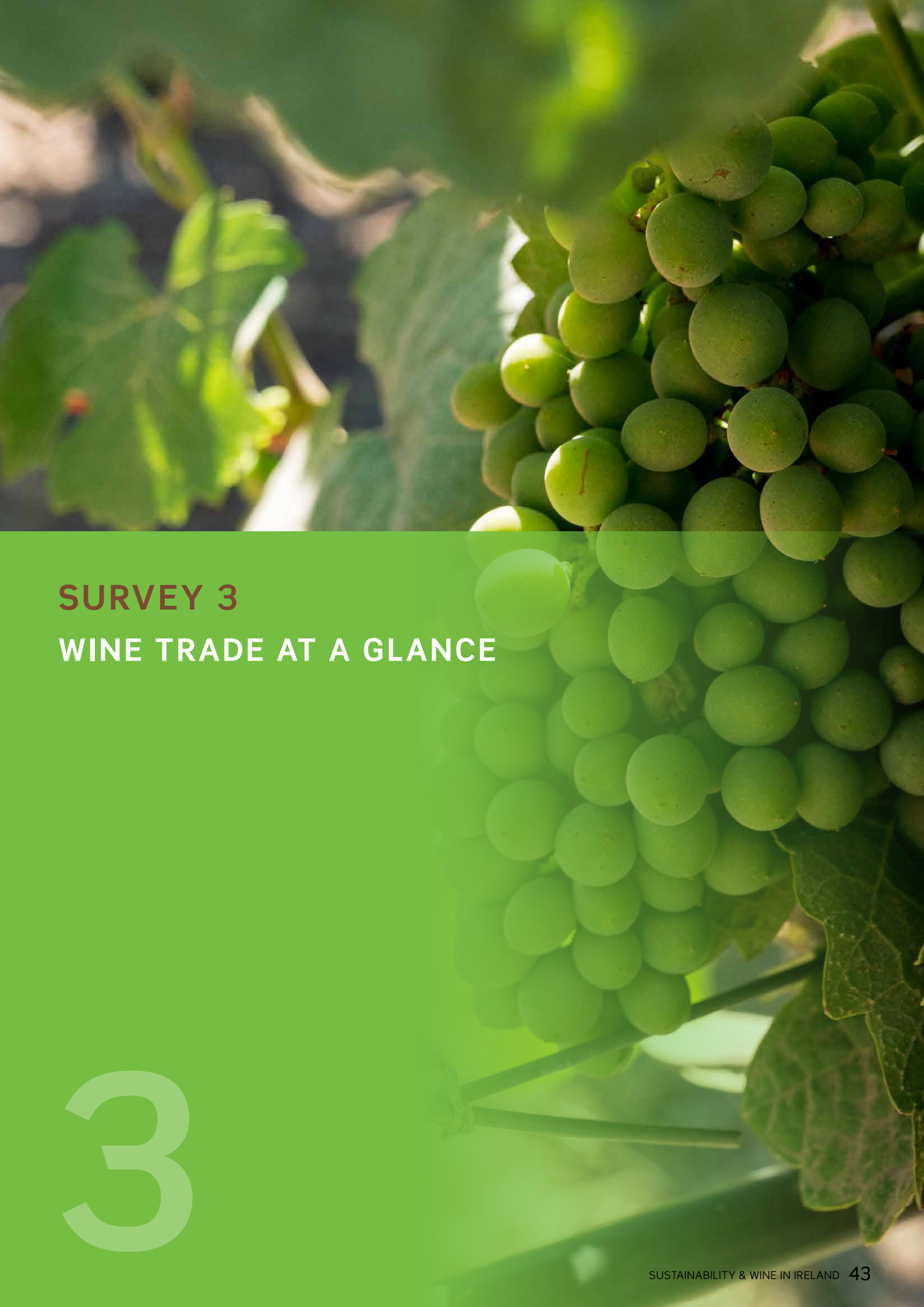
Volume & convenience are dominant drivers: alternative packaging is preferred when serving multiple people or travelling.

Special occasions (holidays, birthdays, Christmas) encourage bulk purchases, often in bag-in-box formats, due to volume needs and ease of sharing.

Outdoor settings (picnics, festivals, camping, beach) make portability and disposability highly valued.

Gifting is selective: eco-conscious or novelty factors increase the likelihood of alternative packaging, but presentation matters – and glass is still preferred for more formal gifts.

Availability matters: many participants only buy alternative packaging when it's easily accessible to them or if it's of sufficient quality.



SURVEY 3

WINE TRADE AT A GLANCE

3

WINE TRADE AT A GLANCE

General consensus on sustainability concepts

There is **little disagreement** on *social responsibility, environmentally friendly production, organic farming, certification/accreditation* as being central to sustainability – or indeed around *regenerative farming, carbon neutral or low-emissions production and energy-efficient/low-emissions packaging*, although there is **some uncertainty** around the last three.

Purchasing decision drivers

While *sustainability* is a consideration in purchasing decisions (75%), these are primarily shaped by *information clarity, trust in producers, and sourcing logistics*. Individual preference and business practicality outweighs sustainability for many.

Attitudes to certification and accreditation are divided

Some see certification and accreditation as *essential accountability*, while others prefer to rely on *personal judgment and knowledge of practices*. Sustainability is i.e. Sustainability is seen as not important for consumers - only 'organic' drives sales.

Ambivalence about alternative packaging

There is a **resistance** to alternative packaging and a high level of **disengagement** regarding the *sustainability impact of glass bottles*. This reflects a wider pattern of sustainability being seen as having to **compromise** e.g. on *price, quality, tradition or aesthetics*. Trade doesn't see customers ask for alternative packaging.

Guiding sustainable choices

Trade state **lack of consumer demand** for sustainable options – yet customers respond well to *professional guidance, information and education and a well-considered selection* of sustainable wine. *Digital platforms* (social media, newsletters, online) are **underused** as a platform, to educate customers and staff alike.

Staff training

While most of these companies do educate or encourage awareness amongst employees regarding sustainability in wine, in an unstructured way, there is an **opportunity** for *staff training around sustainability and sustainable sourcing practices* – perhaps through collaborating with other businesses on best practice.

Barriers and opportunities

Cost is seen as the highest **barrier** to sustainability. However *education/guidance/training* resonates most with trade in terms of welcomed supports or collaborations. A call for trade and consumer *tastings* highlights a parallel **opportunity** for raising consumer awareness while educating trade. On-trade and independent retailers could be key to messaging and direct communication with consumers.

SUSTAINABILITY SURVEY 3: WINE TRADE



The Irish Wine Trade Sustainability Survey was designed to understand the general awareness and understanding of sustainability practices and credentials across a broad sample of on- and off-premises wine trade partners, and the degree to which sustainability is integrated into stocking decisions, communications with consumers and their own internal sustainability efforts.

Key sections included:

- Company Profile
- Sustainability Awareness & Stocking Decisions
- Packaging & Logistics
- Consumer Demand & Perception
- Internal Sustainability Awareness, Practices & Challenges
- Outlook & Collaboration

The objective for this survey was to gain insight into levels of engagement amongst trade with sustainability issues, and to ascertain challenges and opportunities, plus levels of appetite for cross-industry collaboration.

Key themes of findings include:

- Defining 'sustainable wine'
- Commercial value of sustainability in wine as drivers of what they stock/list and what they sell

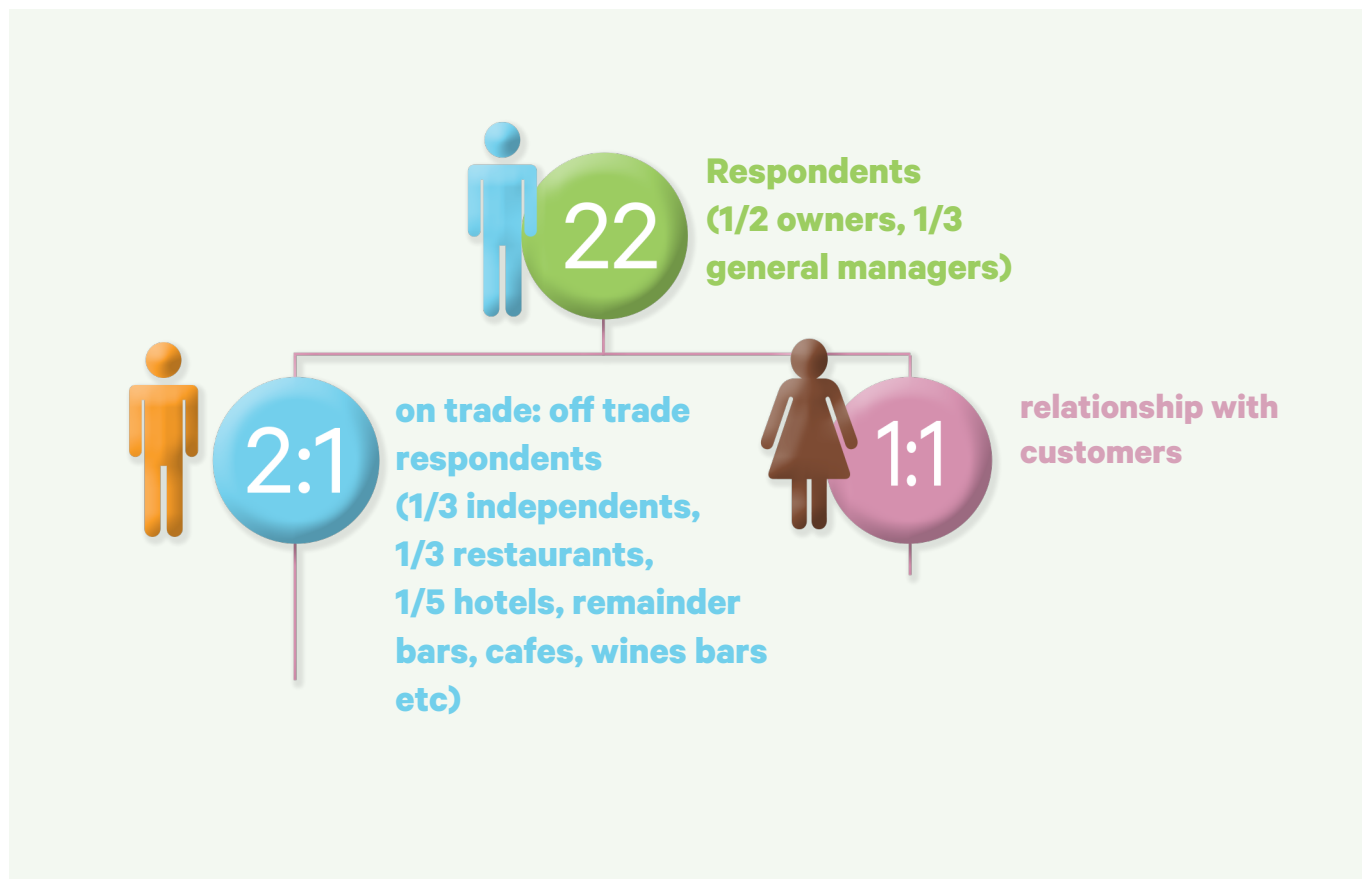
- Attitudes to alternative packaging (internally and their consumers)
- Levels of awareness and engagement in sustainability of wine and generally, including internal practices
- Challenges, barriers and opportunities for improving sustainability, including openness to collaboration

Who did we talk to?

Just 22 respondents completed the survey out of the 47 who began it. (Most drop offs took place early in the survey, after the first complex question about defining sustainability in wine.)

Respondents fell into three sub-cohorts of businesses: independent wine retailers (32%), restaurants (30%), plus hotels (20%), pubs and bars, wine bars and cafes. A separate survey was sent directly to wine buyers of multiple retailers and supermarkets. Most respondents are key decision makers (owners or general management) plus some working in food and beverage management, purchasing and consumer sales.

Half of these businesses import some of their own wine. Their core consumer demographic is aged 36–45 years old and the majority 36–65 years old. (See Methodology chapters for more details.)



1

DEFINING 'SUSTAINABLE WINE': WHAT DOES IT MEAN TO THE WINE TRADE?

The survey questioned respondents on the understanding of 'sustainable wine' within their respective businesses; this question was asked in the same format for each cohort across the four surveys so that we could easily compare answers.

What did we ask?



How do these wine trade representatives **understand the term 'sustainable wine'**? Respondents were asked how they would best define their company's understanding of 'sustainable wine', and given a number of terms with the option to agree with strongly or moderately, disagree with or indicate uncertainty.

What did we learn?



There was relatively high agreement amongst the trade with very strong support overall for most of the suggested terms.

Key terms of definition

More than half of trade surveyed identified the following **key terms**, listed here in order of strong agreement and highlighted in green above, when asked what 'sustainable wine' means to their businesses:

- **environmentally** friendly production (70.73% strongly agree + 19.51% moderately agree = c.**90% agree**)
- **regenerative farming** (60% + 20% = **80% agree**)
- energy efficient or **low-emissions packaging** (59.46% + 24.32% = c.**84% agree**)
- carbon neutral or **low-emissions production** (56.76% + 29.73% = c.**86.5% agree**)
- **socially responsible** labour practices (55.56% + 33.33% = c.**87% agree**)
- **certified**/accredited as sustainable (55.26% + 34.21% = c.**89.5% agree**)
- **organic** farming (52.63% + 36.84% = c.**89.5% agree**)
- **natural** or additive-free (42.86% + 25.71% = c.**68.5% agree**)
- **biodynamic/Demeter** (40.54% + 37.84% = c.**78.5%**)
- **low air miles** (36.36% + 36.36% = c.**73% agree**)
- no added **sulphur** (28.57% + 25.71% = c.**54%**)
- **vegan** (21.21% + 30.30% = c.**51.5%**)

There was notably **low disagreement** amongst the trade on specific terms, namely

- social responsibility (**0%**)
- environmentally friendly production, regenerative farming, organic farming, certified/accredited, carbon-neutral/low-emissions production (just **2–3%** disagreed on all)



but considerably **higher disagreement** regarding other terms, namely

- no added sulphur **(34%)** + 11.5% ‘don’t know’
- vegan **(33%)** + 15% ‘don’t know’
- natural / additive free **(23%)** + 8.5% ‘don’t know’

with relatively high **uncertainty** around

- regenerative viticulture (c.**17.5%** ‘don’t know’)
- low-emissions production and packaging (both c.**11%** ‘don’t know’)

Worth noting

When judged by overall agreement (strong and moderate combined) the top three terms to define ‘sustainable wine’ here are environmentally friendly production, certified/accredited as sustainable and organic farming – but the latter two slip down the leader table when judged by strong agreement, coming in after regenerative farming, energy efficient or low-emissions packaging, carbon neutral or low-emissions production and socially responsible labour practices.

This perhaps suggests that, while those who are passionately engaged in sustainability in wine are focusing on emerging vineyard practices and on Scope 3’s largest single cause of emissions (packaging), organic certification remains more resonant in the mainstream.

Table 3: Trade responses to the definition of sustainable wine

Trades’ responses to the definition of sustainable wine	Highly Agree	Moderately Agree	Overall agreement	Disagree	‘don’t know’
Environmentally friendly production	70.7%	19.5%	90.2%	2.4%	7.3%
Regenerative farming practices	60.0%	20.0%	80.0%	2.5%	17.5%
Energy-efficient or low-emissions packaging	59.5%	24.3%	83.8%	5.4%	10.8%
Carbon-neutral or low-emissions production	56.8%	29.7%	86.5%	2.7%	10.8%
Socially responsible labour practices	55.6%	33.3%	88.9%	0.0%	11.1%
Certified / accredited as sustainable	55.3%	34.2%	89.5%	2.6%	7.9%
Organic farming practices	52.6%	36.8%	89.5%	2.6%	7.9%
Natural or additive-free wine	42.9%	25.7%	68.6%	22.9%	8.6%
Biodynamic farming practices	40.5%	37.8%	78.4%	8.1%	13.5%
Low air-miles	36.4%	36.4%	72.7%	12.1%	15.2%
No added sulphur	28.6%	25.7%	54.3%	34.3%	11.4%
Vegan	21.2%	30.3%	51.5%	33.3%	15.2%

Further insights

We also asked respondents for any further elements that they would include in a definition of their company's understanding of 'sustainable wine'.

As with other optional questions in this trade survey specifically, engagement with optional questions was low, and suggestions offered tended to be broader comments and observations and rather than additional terms to add to a definition.

However these observations are worth noting in themselves for the story they tell, and included

- a need for staff **education** about environmental topics,
- an acknowledgement of the **complexity** of topics, such as the carbon footprint of the life cycle of the bottle (ie recycled glass from where), and
- a caveat that while many of the definition terms listed are desirable they are 'probably **aspirational**'.

The Irish wine trade come together to discuss sustainability in wine at the Sustainability & Wine in Ireland report launch, 03 March 2026



2

COMMERCIAL VALUE OF SUSTAINABILITY IN WINE



The survey explored the extent to which sustainability factors drive what these wine trade representatives stock or list, and what they sell. These were asked as separate questions and are dealt with separately below.

What did we ask?



When it comes to stocking and listing wines, do sustainability factors including commitments, practices and accreditation drive decisions? Why (or why not), to what extent and how does that sit within other driving factors?

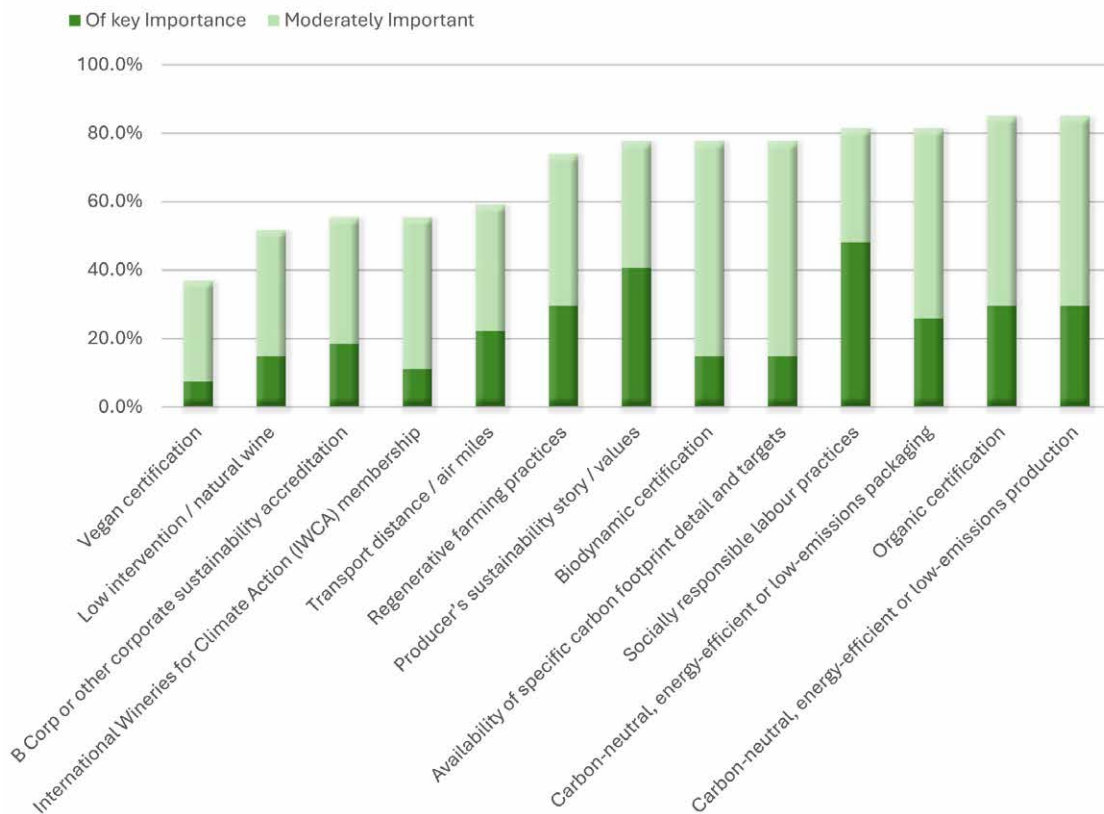
What did we learn?



A majority of trade respondents (41%) say **sustainable considerations do influence the wines they stock or list** (22% say they don't and 37% say 'sometimes'), but mainly as a secondary factor behind consumer demand, reputation and financial viability.

Many respondents see a commitment to sustainability as ethically essential, a professional responsibility and increasingly relevant to consumers, despite some reporting a lack of consumer demand. However **practical realities (price, availability, sales pressure) currently limit its weight in decision-making**. Some also made a strong positive association between the sustainability and quality of wines.

SUSTAINABILITY FACTORS THAT MOST AFFECT TRADE PURCHASING DECISIONS



Sustainability factors that most affect Trade purchasing decisions	Of key Importance	Moderately Important	Overall Important	Not Important	'Don't know'
Socially responsible labour practices	48.2%	33.3%	81.5%	4.8%	3.7%
Producer's sustainability story / values	40.7%	37.0%	77.7%	14.8%	7.4%
Regenerative farming practices	29.6%	44.4%	74.0%	18.5%	7.4%
Organic certification	29.6%	55.6%	85.2%	14.8%	0.0%
Carbon-neutral, energy-efficient or low-emissions production	29.6%	55.6%	85.2%	11.1%	3.7%
Carbon-neutral, energy-efficient or low-emissions packaging	25.9%	55.6%	81.5%	14.8%	3.7%
Transport distance / air miles	22.2%	37.0%	59.2%	29.6%	11.1%
B Corp or other corporate sustainability accreditation	18.5%	37.0%	55.5%	33.3%	11.1%
Low intervention / natural wine	14.8%	37.0%	51.8%	40.7%	7.4%
Biodynamic certification	14.8%	63.0%	77.8%	18.5%	3.7%
Availability of specific carbon footprint detail and targets	14.8%	63.0%	77.8%	14.8%	7.4%
International Wineries for Climate Action (IWCA) membership	11.1%	44.4%	55.5%	18.5%	25.9%
Vegan certification	7.4%	29.6%	37.0%	51.9%	11.1%

When asked the open-text question of why sustainability considerations do or don't influence the wines they stock or list, certain themes emerged – listed below with a sample of some of the related quotes.

Positive reasons for listing sustainable wines

THEME 1: Ethical responsibility

"We all have a part to play."

"Responsible purchasing leads me to sustainable wine."

"To encourage the health of our planet."

THEME 2: Quality association and alignment with policy

"Better to have sustainable wines to keep the standards of quality high."

"It makes the wine more 'honest' and indigenous."

"Tie in with our purchasing policy and sustainable operations."

THEME 3: Educational role of professionals

"We have a responsibility (mostly ignored) to educate in the negative impacts of mass-produced agro-industry."

THEME 4: Consumer demand

"Customers request it."

Barriers for listing sustainable wines

THEME 5: Lack of demand from consumers and conditional support

"No demand."

"For the general consumer it is not that important yet."

"A lot of people will buy what they like whether or not sustainable."

"Not overly highlighted to me nor do many customers look specifically for these wines."

THEME 5: Price concerns

"Price considerations."

"My concern is making money and not going out of business."

"Worried about costs rather than the environment, customer purchasing behaviour"

THEME 6: Market maturity, lack of availability, distrust/scepticism

"I don't feel there are enough options on the market at present but I also feel it is likely to grow."

"Always on the lookout and aware of greenwashing."



Further insights

When asked to choose from a list of what **sustainability factors** most affect their purchasing decisions:

- Most answered that the following factors, certifications or organisation memberships moderately affected purchasing decisions: Organic certification, biodynamic, regenerative, social responsibility, carbon neutral, availability of specific carbon information, transportation, producers’ sustainability story and IWCA membership.
- Social responsibility was the highest influencing factor, along with the availability of specific carbon information.
- Vegan certification was the lowest influencing factor, with very little influence on purchasing.

When asked to elaborate further regarding **sustainability factors that do or do not drive purchasing decision**, certain themes arose from the comments:

THEME 1: Transparency, Scepticism & Information Quality

“It’s good to have as much information as possible ... as long as the info is clear and real.”

“Not necessary [presumably referring to accreditation] ... I do believe by seeing it first hand that sustainable practices are done, without having to apply to the local industry vegan/ organic/biodynamic certs.”

THEME 2: Sourcing & Logistics Considerations

“...focused our buying on the old world due to proximity and ease of sourcing better quality wines with lower air miles involved.”

THEME 3: External Certification or Accountability

“Being certified by an external company holds claims to account.”

“Appreciation to the winemakers who do practise sustainability and to encourage those who don’t to start.”

THEME 4: Lack of knowledge/relevance

“I don’t know much about sustainability.”

“They don’t drive my purchasing decisions.”

“It would not bother me, I will buy what I like.”

These additional comments indicate that while sustainability is one consideration, purchasing decisions are **primarily shaped by information clarity, trust in producers, and sourcing logistics.**

Certification is divisive: some see it as essential accountability, while others distrust it and rely on personal judgment. A recurring theme is that individual preference and business practicality outweighs sustainability for some buyers.

What did we ask?



When it comes to **wine sales**, do sustainability factors including commitments, practices and accreditation drive what these wine trade representatives sell? Do respondents feel their customers care about sustainability when buying wine, and if so, what factors?

What did we learn?



Most respondents say that **sustainability credentials sometimes influence** what their customers buy.

The credentials that seem to drive sales the most:

- Organic is by far the most frequently cited and clearly resonates – although cost is also a factor (“organic but in relation to price” suggests price-qualified support)
- Vegan is often paired with ‘organic’, suggesting an alignment with broader philosophies around food and drink consumption

Other less commonly cited credentials:

- Biodynamic is occasionally mentioned, but not common
- Low intervention wines and packaging considerations both have a minimal presence

Worth noting

There is a gap between the low importance our surveyed consumers give to vegan wines in their responses and what is perceived and reported here by the trade who sell wine to them. For example less than a third of consumers surveyed would include 'vegan' in their definition of sustainable wine, and a very small sample said they would look for certifications like vegan or organic when buying wine.

However it's worth remembering that these trade responses come primarily from restaurants or independent retailers, where there is the time and opportunity for the hand-selling of a wine and for conversations to be had around these sustainable credentials. Within restaurants in particular, those conversations may flow naturally from a consumers' personal menu choices or from a restaurants' values around provenance.

Further insights

We asked how these businesses **communicate the sustainability of their wines** to customers, if at all. It was an open-text question but we provided some prompts (e.g. shelf talkers, menus, online, staff recommendations, etc, or not currently doing so).

- **Menus / Wine Lists** are the most frequently cited channel of communication
- **Staff Recommendations** follows closely, often paired with other methods
- **Shelf Talkers** and **In-store Information** is less common but still notable (especially given the 2:1 ratio of on- to off-trade)
- **Digital Platforms** (social media, newsletters, online) are underused, with rare mentions

Several are taking a passive, reactive approach to sustainability messaging (communicating only if asked) and some are not engaging at all.

We also asked what sustainability practices implemented as a business (in relation to wine) that they feel their customer appreciates.

THEME 1: Sustainable wine selection – The highest response related to their emphasis on offering wines with sustainable credentials such as organic and biodynamic.

THEME 2: Customer Communication – There was a moderate response related to their use of menus, websites or direct information to communicate sustainability.

THEME 3: Recycling & Waste Reduction – There was a moderate response related to in-house waste reduction practices such as cardboard reuse, glass bottle recycling or coffee waste separation.

THEME 4: Alternative Packaging – There was a low response related to wine on tap and packaging consideration.

THEME 5: Customer Engagement – There was a low response related to incentives and encouraging behaviour like returning wine bags.

Worth noting

Customers appreciate being given a well-considered choice in terms of sustainable wine selection but also professional guidance, information and education. Staff are often in a position to have one-to-one conversations to provide that guidance, provided they themselves are well-informed. Digital platforms (social media, newsletters, online) are underused as a platform, and could be one way of tackling education of both customers and staff alike.

3

ATTITUDES TO ALTERNATIVE PACKAGING (WITHIN THE BUSINESS AND AMONGST THEIR CUSTOMERS)



We explored the extent to which alternative packaging is a presence or an opportunity within these businesses, and found high resistance from the trade and their customers. It's worth remembering that two thirds of respondents are on-premises trade which influences the kinds of alternative packaging that they might use,

What did we ask?



What **packaging factors** influence their decision to stock a wine, if any, and do they have any thoughts on the sustainability impact of glass bottles for wine?

Which alternative **packaging formats** do they already stock, or would they consider it and why or why not?

Also, do their customers ask about alternative packaging (e.g. bag-in-box, cans, wine-on-tap) and what related feedback do they hear?

What did we learn?



Certain packaging factors such as bottle weight and bottle closure do influence these businesses' decisions to stock particular wines. However there is a high level of **disengagement** regarding the sustainability **impact of glass bottles**, albeit that lightweight glass bottles are the most likely of alternative packaging to be stocked, if any.

Currently, the **majority** (63%) of respondents **do not stock** any wines in **alternative packaging**. There is a strong resistance to the idea, with nearly half of respondents saying that they wouldn't do so, mostly due to concerns about quality, aesthetics, shelf-life (e.g. of cans) or customer perception. A slightly smaller number are more open to it, but mostly conditionally, depending on the context (such as selling non-glass for festivals) or with concerns about suitability or challenges around storage (e.g. of cardboard in a warehouse in damp Irish winters).

Of the alternative packaging that these businesses stock, lightweight bottles were the most prevalent (33% of respondents stock them), followed by bag-in-box (22%) and cans (15%). See below for a pie-chart representing the proportional presence of the various types of alternative packaging found amongst the trade businesses surveyed (which is different to these percentages cited here, given that some businesses will stock more than one type of packaging).

Several barriers emerged. Most respondents say that their **customers never ask** about alternative packaging (e.g. bag-in-box, cans, wine-on-tap). Of the small amount of engagement or feedback reported, these tend to be **staff-driven conversations** (customers don't ask on their own). Alternative packaging is often seen as **associated with low quality wines**, whether that's bag-in-box wine or alternative closures such as crown caps or even screwcaps, and **traditional preferences** such as cork closures are still strong with some customers. There were some isolated examples of wine on tap, in boxes or cans being accepted by consumers, but this was a clear minority.

Worth noting

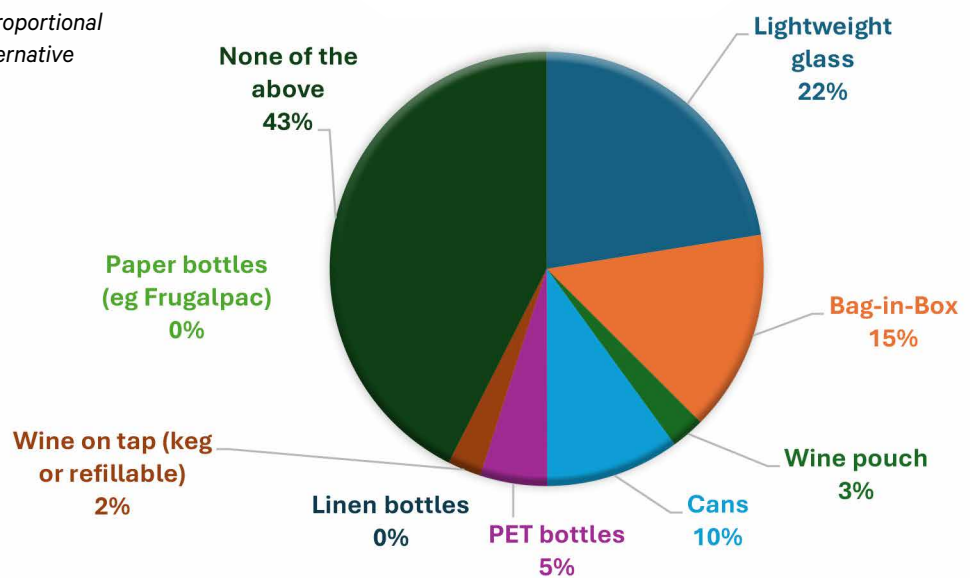
If customers don't ask on their own, but are open to staff-driven conversations (and welcome expert guidance, as we've seen above), this can be approached as both a barrier and an opportunity.



Think outside the bottle - some examples of alternative wine packaging at the Sustainability & Wine in Ireland report launch, 03 March 2026

ALTERNATIVE PACKAGING FORMATS THAT TRADE STOCK

These percentages represent the proportional presence of the various types of alternative packaging found amongst the trade businesses surveyed.



Further insights

When asked for their thoughts on the sustainability impact of glass bottles for wine, most say they have no opinion or aren't thinking about it. However, of those respondents who do have an opinion, the following themes emerged, suggesting a mix of both resistance and opportunity to change.

THEME 1: Tradition – glass is viewed as a traditional and essential part of wine culture.

THEME 2: Weight Concerns – several comments focused on heavy bottles and their unnecessary impact.

THEME 3: Recyclability Myths – some users note that glass is often marketed as recyclable, but that it is rarely effectively recycled.

THEME 4: Call for Change – some suggest shifting to lighter bottles or altering consumer perception.

4

LEVELS OF AWARENESS AND ENGAGEMENT IN SUSTAINABILITY OF WINE AND GENERALLY, INCLUDING INTERNAL PRACTICES



What did we ask?



Do these companies actively **educate** or encourage awareness amongst **employees** regarding sustainability in wine?

How familiar are these businesses with various listed **certification** schemes?

Do they currently have any **internal sustainability-related initiatives** within their business?

And how important will sustainability in wine be to them in the next **3–5 years**?

What did we learn?



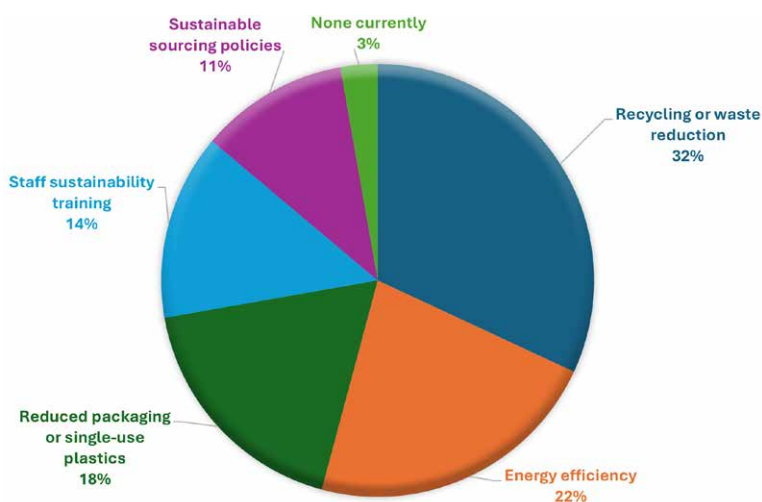
Most of these companies **do educate or encourage awareness amongst employees** regarding sustainability in wine, but in an unstructured way.

There was highest familiarity with and **confidence around organic certification**, followed by Fairtrade and biodynamic certification schemes. There was more **tentative familiarity with Carbon Neutral/Net Zero** certification, and lowest familiarity with Iso14001, B-Corp, LEED (Leadership in Energy and Environmental Design), LIVE (Low Input Viticulture and Enology) and bee friendly certifications.

Regarding **internal initiatives**, most of these businesses have recycling/waste reduction in place followed by energy efficiency measures (one third). Less than half have staff training around sustainability, and one in three have sustainable sourcing practices.

Local and sustainable sourcing, renewable energy and packaging alternatives also got frequent mentions within the further comments where some common themes emerged, suggesting some enthusiasm for these practices.

SUSTAINABILITY-RELATED INITIATIVES WITHIN TRADE BUSINESSES



THEME 1: Local & Sustainable Sourcing

“Purchasing policy, support local suppliers or distributors”

“Seasonal/local”

THEME 2: Renewable Energy & Energy Efficiency

“Solar power”

“Combined heat power unit. Renewable energy”

“Insulation. LED lighting”

THEME 3: Waste Reduction & Packaging Alternatives

“Reduced paper packaging, all home compostable”

“No single use coffee cups since October 2019”

“Deposit and return on some retail packaging”

Worth noting

While most of these companies do educate or encourage awareness amongst employees regarding sustainability in wine, in an unstructured way, there is an opportunity here for developing a new focus on staff training around sustainability and sustainable sourcing practices – perhaps through collaborating with other businesses on best practice.

5

CHALLENGES, BARRIERS AND OPPORTUNITIES FOR IMPROVING SUSTAINABILITY, INCLUDING OPENNESS TO COLLABORATION

The survey questioned respondents on the understanding of ‘sustainable wine’ within their respective businesses; this question was asked in the same format for each cohort across the four surveys so that we could easily compare answers.

What did we ask?



What **challenges or barriers** have they faced, if any, in becoming more sustainable as a wine-related business? (Respondents first selected options from a list but with an opportunity to elaborate in an open text answer.)

What **supports or resources** would help them offer a more sustainable wine range? (Respondents ranked answers from a list provided.)

How important will sustainability be to their business in the **next 3–5 years**? And are they **open to collaborating** within the Irish wine trade to promote sustainable wine, and if so, in what way?

In terms of **potential or welcome supports or resources**, the following are rated as being potentially helpful to trade partners hoping to offer a more sustainable wine range:

- more detailed information from importers regarding the sustainability of wineries (although access to specific carbon footprint data had a low rating here)
- clearer guidance about the environmental impact of various packaging options,
- and to a lesser extent, more education generally (staff training, consumer-friendly educational materials).

Cross-industry collaboration and carbon footprint data had low ratings.

Focus on: Collaboration and outlook

Sustainability is for the most part (40%) seen as being ‘somewhat important’ to these trade businesses in the next 3–5 years, with just a small minority (10%) seeing it as critical.

A large majority (90%) either are or might be **open to collaborating** within the Irish wine trade to promote sustainable wine (although it didn’t rate high in helping their businesses improve their sustainable wine range).

Some themes emerged as to how this collaboration might look. (Note that this was asked as an open text question but with the prompts of e.g. knowledge sharing, co-promotion, sustainability standards, tasting events etc.)

What did we learn?



The **highest barriers** to becoming more sustainable as a wine-related business are seen as:

- **price/cost**,
- a lack of **consumer understanding** (and to a lesser degree demand) and
- a lack of **availability** or sufficient **quality**.

THEME 1: Knowledge Sharing & Education

There is a high desire for shared insights, training, eco-wine knowledge. Note that this is a common theme reflected by other cohorts throughout the various surveys.

THEME 2: Tasting Events

There is a high desire and strong interest in tastings to explore sustainable wines – both for trade themselves and/or consumer-facing.

THEME 3: Co-Promotion & Joint Marketing

There is a moderate desire for the promotion of sustainable wines across businesses.

THEME 4: Standard Setting

There is a moderate interest in setting industry standards and creating alignment and coordination among businesses to promote sustainable practices, with independent retailers highlighted in particular.

THEME 5: Training for Staff

There is a moderate interest in staff-focused education on sustainable wines.

THEME 6: Informed Buying

There is a small demand for better access to sustainability credentials.

THEME 7: Inclusivity & Agency

There was also a call for inclusive involvement, to ‘be part of the process’.



Worth noting

While cost is seen as the highest barrier to sustainability, it is the opportunity for education that resonates most with trade in terms of supports or collaborations that would be welcome.

The **high desire for knowledge** sharing, education and tasting events expressed here links in with the need expressed elsewhere by trade, but also by buyers and importers, for educating and raising awareness amongst consumers, and for the **sharing of clear information amongst trade and media**.

It also potentially addresses the expressed concerns about greenwashing that run as a thread through these survey answers (as indeed through any honest, robust engagement with sustainability today). Arguably, it is access to clear information and education that arms us all to think critically and confidently about sustainability messaging, whether as a consumer or professional.

And so?

It is also worth noting that there is a difference between educating wine-specialised journalists and general media, and that both could be considered and included in communication strategies.

Further insights

Finally, we welcomed any further thoughts, ideas, frustrations, hopes or concerns about sustainability in wine, including how it relates to their businesses.

Certain themes arose from their comments:

THEME 1: Scepticism / Frustration with Greenwashing

There is a moderate distrust of sustainability claims perceived as inauthentic.

“Corporate bought greenwashing infuriates me... is this that?”

THEME 2: Cost Concerns / Price Sensitivity

There is a moderate worry about sustainability driving prices up.

“All these initiatives have a cost which will be added to costs and reflected in the end price to consumers”

THEME 3: Policy change

There is a low to moderate desire for structural support (VAT changes, recycling reform)

“Collaborate with the government ... [to] create competitive prices for recyclable bins, as opposed to black bins. Lower VAT in disposable items etc, not just for the aim of promotion but rather to make sense to be only that way”

THEME 4: Need for Simplicity & Better Communication

There is a low call for clear, direct messaging about sustainability.

“State the position clearly & simply”



SURVEY 4

WINE BUYERS AT A GLANCE

4

WINE BUYERS AT A GLANCE

Strong consensus on core sustainability concepts

Buyers show strong **alignment** around core sustainability concepts (with full consensus around the terms *socially responsible, carbon-neutral, environmentally friendly, energy efficient, regenerative viticulture, certified/accredited*).

However views on *vegan wine, natural/additive-free wine and no added sulphur* are more **divided**.

Regenerative viticulture has **lower understanding** than amongst importers and does not typically influence listing decisions.

Emerging sustainability strategies

There is a strong **commitment** to sustainable action, as a key or core business value. Some have supporting systems in place (suppliers often vetted for sustainability credentials) but formal strategies are still **developing** and in early stages.

Relationship-focused approaches over formal data

Buyers **emphasise** *trusting supplier relationships*, sometimes over formal metrics or official accreditation or certification. **Gaps** exist between a *sense of being well-informed* on carbon-emissions, and having that perception confirmed by *verifiable data*.

Openness to alternative packaging

Attitudes to and adoption of alternative packaging is **led (or not) by consumer demand** and concerns – although consumers are responding well to promotions. Currently all stock *bag-in-box* (100%), most stock *lightweight bottles and cans* (80%) and some experiment with *PET, paper or linen alternatives* (20%).

Under-developed consumer communication

Buyers recognise that *consumer education* about sustainability in wine is **needed**. Multiples are well placed for consumer education campaigns and promoting change in buying habits with simple and clear messaging. Currently most are not talking to consumers re sustainability beyond label messaging but those who are report do *positive feedback*.

Tentative openness to industry collaboration

Buyers are **open** to cross-industry collaboration with *clear agendas and measurable goals*, albeit that these would need to fit with *internal business strategies*. There is a common challenge to balance commercial realities with sustainable goals. Practical support through education, certification guidance and carbon measurement tools are **welcomed**.

SUSTAINABILITY SURVEY 4: WINE BUYERS



The Irish Wine Buyers' Sustainability Survey was designed to understand their general awareness and understanding of sustainability practices and credentials, and the degree to which sustainability is integrated into Irish wine **importers'** day-to-day decisions and planning of **wine buyers for Irish retail multiples**, including what drives purchasing decisions, issues of packaging, transport and emissions, consumer influence, internal sustainability efforts and appetite for cross-industry collaboration.

Key sections of the survey included:

- Company Profile
- Awareness of Sustainability in Wine & Stocking Decisions
- Understanding of Sustainability Practices & Credentials
- Transport, Packaging and Emissions
- Consumer Demand & Perception
- Internal Company Perspective
- Industry Collaboration & Future Plans

The **objective** for this survey was to gain insight into levels of engagement amongst wine buyers with sustainability issues, and to ascertain challenges and opportunities, plus levels of appetite for cross-industry collaboration.

Key themes of findings include:

- Defining 'sustainable wine'
- Levels of awareness and engagement in sustainability of wine and generally, including internal practices
- Commercial value of sustainability in wine as drivers of what they purchase, stock and sell
- Attitudes to alternative packaging
- Challenges, barriers and opportunities for improving sustainability, including openness to collaboration

Who did we talk to?

Wine buyers from six companies including supermarkets and multiple retailers took part in the survey. All but one were buyers for over 50 stores, buying at all price points, with wines from Europe and the Americas dominating. Two thirds bought between 25-50% of wine stock exclusively, and one third upwards of 50%. (See Methodology chapters for further details.)



1

DEFINING 'SUSTAINABLE WINE': WHAT DOES IT MEAN TO BUYERS?

The survey questioned respondents on the understanding of 'sustainable wine' within their respective businesses; this question was asked in the same format for each cohort across the four surveys so that we could easily compare answers.

What did we ask?



How do these wine buyers **best define their company's understanding of 'sustainable wine'**? Respondents were given a number of terms with the option to agree with strongly or moderately, disagree with or indicate uncertainty.

What did we learn?



As with the importers, there was relatively **high agreement** amongst the wine buyers surveyed with very strong support overall for most of the suggested terms. This shows both alignment in their thinking and a recognition of the breadth in meaning covered by an understanding of 'sustainability' in wine terms.

Key terms of definition

The **key terms** that buyers identify as central to their company's understanding of 'sustainable wine', listed here in order of strong agreement and with unanimous agreement for the first group of terms, are:

- Socially responsible (100% strongly agree + 0% moderately agree = **100% agree**)
- Carbon-neutral or low-emissions production (83% + 17% = **100% agree**)
- Certified/accredited (83% + 17% = **100% agree**)
- Environmentally friendly (83% + 17% = **100% agree**)
- Energy efficient or low-emissions packaging (67% + 33% = **100% agree**)
- Regenerative (50% + 50% = **100% agree**)

There are **small levels of disagreement** over organic and biodynamic practices, and **some uncertainty** around vegan wines, but still with strong agreement:

- organic farming, 50% + 33% = **83% agree** + 17% disagree + 0% 'don't know'
- biodynamic, 33% + 50% = **83% agree** + 17% disagree + 0% 'don't know'
- vegan, 33% + 33% = **66% agree** + 17% disagree + **17% 'don't know'**

The **highest levels of disagreement** are around natural wines and added sulphur, which both divided opinion:

- natural/additive-free wine, 17% + 33% = **50% agree** + 50% disagree + 0% 'don't know'
- no added sulphur, 17% + 33% = **50% agree** + 50% disagree + 0% 'don't know'



Buyers' responses to the definition of sustainable wine	Highly Agree	Moderately Agree	Overall agreement	Disagree	'don't know'
Socially responsible labour practices	100.0%	0.0%	100.0%	0.0%	0.0%
Carbon-neutral or low-emissions production	83.0%	17.0%	100.0%	0.0%	0.0%
Certified / accredited as sustainable	83.0%	17.0%	100.0%	0.0%	0.0%
Environmentally friendly production	83.0%	17.0%	100.0%	0.0%	0.0%
Energy-efficient or low-emissions packaging	67.0%	33.0%	100.0%	0.0%	0.0%
Regenerative farming practices	50.0%	50.0%	100.0%	0.0%	0.0%
Organic farming practices	50.0%	33.0%	83.0%	17.0%	0.0%
Biodynamic farming practices	33.0%	50.0%	83.0%	17.0%	0.0%
Vegan	33.0%	33.0%	67.0%	17.0%	17.0%
Low air-miles	17.0%	50.0%	67.0%	33.0%	0.0%
Natural or additive-free wine	17.0%	33.0%	50.0%	50.0%	0.0%
No added sulphur	17.0%	33.0%	50.0%	50.0%	0.0%

Further insights

When invited to suggest further elements that they would include in a definition of their company's understanding of 'sustainable wine', themes of equity and a responsibility to work sustainably arose.

"All producers should be working in a sustainable way on some level regardless of size"

"Showing belief in Equity in Accountability, i.e. sustainability should not be seen as optional or only for large producers. There's an expectation that all wine producers – big or small – should adopt sustainable practices."

2

LEVELS OF AWARENESS AND ENGAGEMENT IN SUSTAINABILITY OF WINE AND GENERALLY, INCLUDING INTERNAL PRACTICES

What did we ask?



Do wine buyers and their companies know and care about sustainability, and to what extent?

Respondents were questioned on their company's overall awareness of sustainability in wine, internal sustainability-related initiatives and familiarity with wine certification schemes.

What did we learn?



Sustainability is important to these companies, in wine terms and generally.

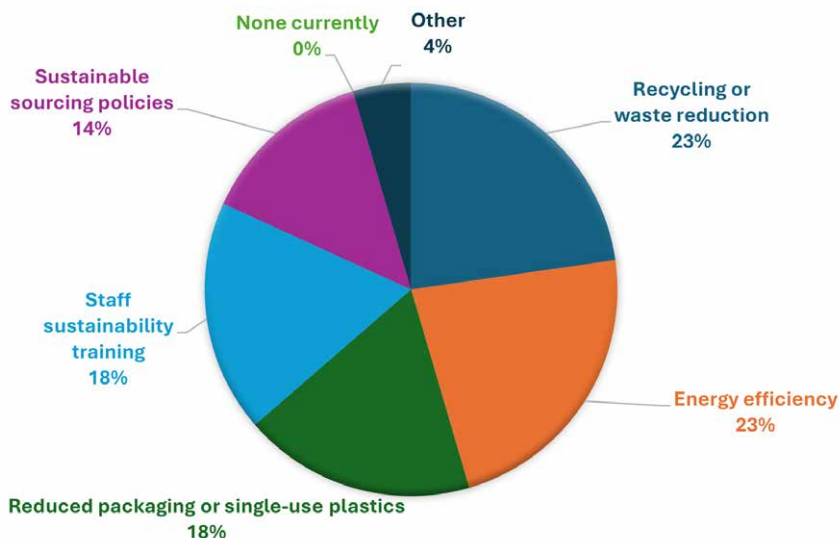
All wine buyers surveyed rated their company's awareness of sustainability issues in the wine industry as either high or very high. Sustainability is also an important element of their **overall company strategy**, with respondents considering it either a **core value** (60%) **or important value** (40%).

However, communication around sustainability is generally not a strong focus. **Most (60%) are not communicating** with their customers about sustainability in wine, beyond existing wine labels. Of those that are communicating, one respondent reports using shelf talkers to promote sustainable wines, while another respondent's company is very proactive with a joined up communications strategy regarding sustainable wines across their brochures, website, at point of sale, via staff and through dedicated product promotions.

The most common **internal initiatives** regarding general sustainability were recycling/waste reduction, energy efficiency and sustainable sourcing, which is similar to the trade respondents. Reduction of packaging and staff sustainability training were also reported.

Most of these companies have **formal sustainability goals or policies**, with a dedicated sustainability lead or team and some level of tracking of internal sustainability performance. These vary from tracking carbon emissions, packaging use and energy use to using a database of directly imported sustainable producers.

SUSTAINABILITY-RELATED INITIATIVES WITHIN BUYERS' BUSINESSES





Certain **sustainability certifications** have high familiarity and awareness in these companies, namely Organic, Fairtrade, B Corp, Carbon Neutral and Sustainable certifications.

There is moderate awareness of other certifications, namely Biodynamic, Bee Friendly, Low Input, LEED, Regenerative, ISO 14001 – although a few respondents were unfamiliar with ISO 14001 and Regenerative certifications.

We also asked specifically about **regenerative viticulture**. There is a low level of understanding of it amongst these buyers and it does not typically influence their listing of a winery or supplier. One respondent did observe however that regenerative viticulture is “fairly new and gaining ground and should be supported, as should any producer adopting sustainable practices depending on their region/circumstances & economics”.

Focus on: Carbon footprint of wines sourced

We asked wine buyers whether they agree or disagree (moderately or strongly, in both cases) with a number of statements related to the carbon footprint of the wines they source. There was general agreement overall to all of the statements but the nuances tell a story.

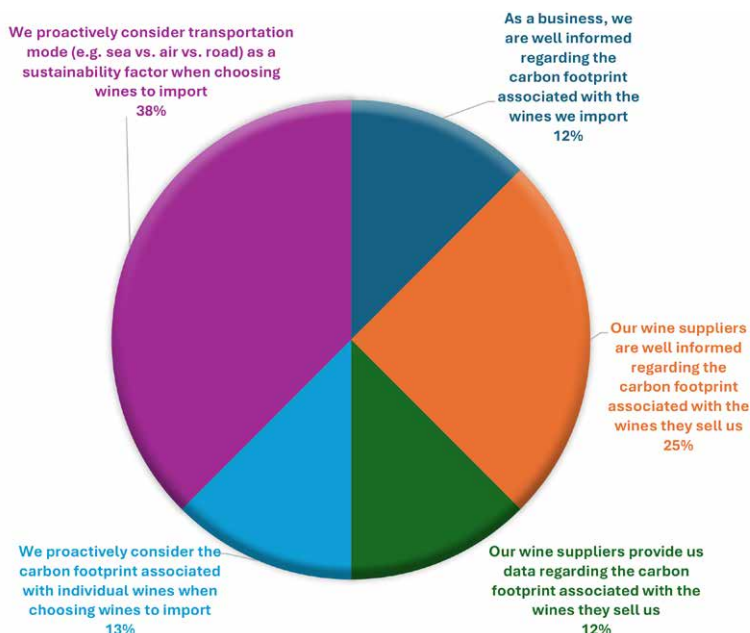
- The strongest support (60% strongly agree) is for the statement that they proactively consider transportation mode (e.g. sea vs. air vs. road) as a sustainability factor when choosing wines to import.
- There is also general agreement (40% strongly agree) that their wine suppliers are well informed regarding the carbon footprint associated with the wines they sell – although lower agreement that those suppliers provide data regarding that carbon footprint and that as a business, these wine buyers are well informed regarding the carbon footprint associated with the wines they import (both 20% strongly agree).
- The only area of disagreement (20% moderately disagree) was over the statement ‘We proactively consider the carbon footprint associated with individual wines when choosing wines to import’. Later when asked if their suppliers and/or wineries report, highlight or actively market their greenhouse gas emissions or carbon footprint, the majority say ‘some of them’ (60%) and the rest ‘none of them’ or ‘don’t know’.

Worth noting

There seems to be a potential gap here between a sense of being well-informed on carbon-emissions, and having that perception confirmed by verifiable data. This in part chimes with the emphasis made elsewhere about valuing trusting relationships with suppliers over a need for certifications, accreditation and other documentation to prove they are prioritising sustainable practices, especially given the sometimes prohibitive costs and resources required for such documentation for smaller producers in particular.

However there is also the risk that assumptions can be made and go unquestioned, such as the perception that sourcing closer to home will ensure lower carbon emissions – or indeed that proactively considering transportation modes is synonymous with proactively considering carbon footprint. New Zealand Wine’s report *Food miles: A small part of the sustainability story* cites various studies including MIT research that show that the carbon footprint of ‘food miles’ (or wine miles) cannot be merely calculated by distance alone to remind us that wine transported long distances by ocean freight produces significantly lower emissions than similar distances covered by by air, road or rail transport.

PROPORTIONAL SUPPORT FROM BUYERS FOR THE FOLLOWING STATEMENTS REGARDING CARBON FOOTPRINT



3

COMMERCIAL VALUE OF SUSTAINABILITY IN WINE AS DRIVERS OF WHAT THEY PURCHASE, STOCK AND SELL

The survey explores how sustainability shapes what wines buyers choose to stock and sell – from ethical priorities and producer commitments to tensions between environmental ideals, consumer understanding and commercial decisions.

What did we ask?



Regarding **wine sales**, do these buyers feel that their retail customers care about sustainability when buying wine?

Regarding **wine purchasing decisions**, how do they characterise their company’s decision-making around sourcing wines in relation to sustainability, and which sustainability factors most affect their decisions?

What did we learn?

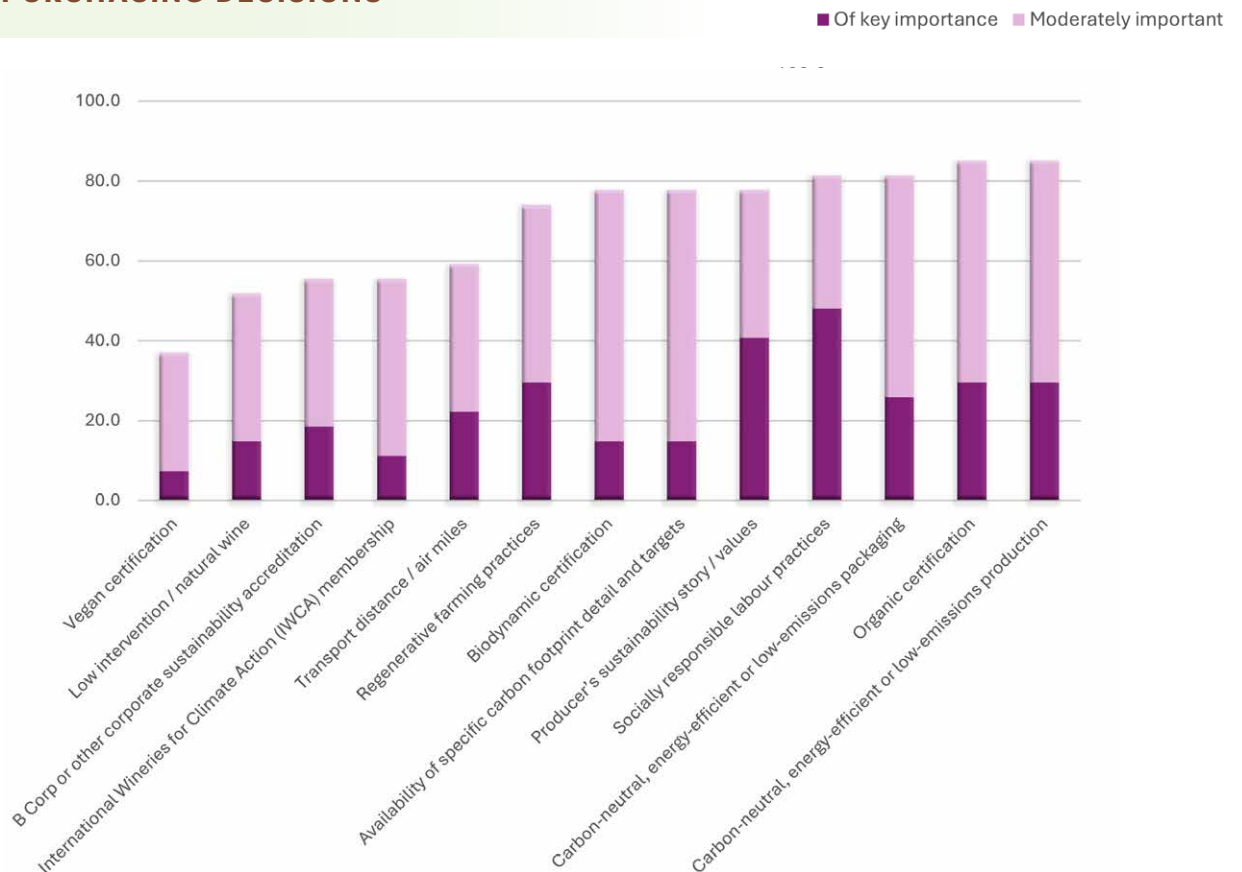


The feeling is that customers do **sometimes care** about sustainability when buying wine, and most especially around issues of ethics, packaging and organic production. However one observation that customers think all wine is sustainable highlights a **lack of consumer knowledge**.

Most companies tend to choose wines according to each producer’s overall environmental commitment. A small cohort tends to favour wines from certain regions or countries for sustainability reasons (such as carbon impact of transport logistics, farming practices, etc.). Accreditation does not feature as a strong driving factor.

The sustainability factors with most influence on **purchasing** decisions are: social responsibility, producers’ sustainability story, B Corp, biodynamic practices, organic farming, low intervention, regenerative practices, carbon neutral.

SUSTAINABILITY FACTORS THAT AFFECT BUYERS’ PURCHASING DECISIONS





When invited to comment further, certain themes emerged.

Themes at a glance

- 1. Supplier Accountability:** Requirement for sustainable certifications and verified sourcing practices
- 2. Core Business Strategy:** Sustainability is integrated into company-wide operations and sourcing
- 3. Cost vs. Sustainability Tension:** Need to manage price pressures while improving environmental practices
- 4. Consumer Transition & Education:** Acknowledgement that customers need time and guidance to adopt to sustainability in wine

Themes explored further

THEME 1: Supplier Accountability and Certification

“We request sustainable certification from all producers.”

“Working with sustainable suppliers for both wine and packaging is of key importance.”

This theme highlights a strong emphasis on vetting producers and holding suppliers accountable through formal sustainability certification. There is a preference for verified, transparent sourcing over general claims. Businesses want assurances that partners are aligned with their sustainability values.

THEME 2: Sustainability as a Core Business Value

“Sustainability is a key focus of our company...”

Sustainability is not treated as an optional add-on but as a core strategic principle. It's embedded in procurement decisions, brand positioning and operational standards.

THEME 3: Balancing Sustainability with Economic Realities

“We need to be realistic about air miles and carbon footprint because we have to import...”

“Price is key... very important that we steady the price whilst we bring [customers on a journey]”

While sustainability is clearly valued, there is an honest acknowledgement of practical constraints, especially around international sourcing (air miles, carbon footprint) and cost pressures. These comments reflect the tension between sustainable ideals and commercial feasibility.

THEME 4: Consumer Transition, Readiness and Education

“...there are customers in the market who require us to go on a journey...”

This highlights the perception that consumer demand or understanding of sustainability is uneven. Buyers see part of their

role as helping consumers adapt gradually, which requires price sensitivity and education rather than radical change.

Further insights: How sustainability credentials and accreditations influence purchasing

Sustainability credentials and accreditations sometimes influence the purchasing decisions of the wine buyers surveyed. When invited to comment further, certain themes emerged.

Themes at a glance

- 1. Collaborative Supplier Engagement:** Emphasis sometimes on improving sustainability through relationships rather than formal certification.
- 2. Certification Awareness:** There is knowledge and tracking of certifications, but not always direct application or prioritisation.
- 3 Delegated Responsibility:** The parent company plays a significant role, implying varying levels of engagement across teams.
- 4 Customer-Driven Standards:** Sustainability efforts may be guided more by customer requirements than internal policy.

Themes explored further

THEME 1: Practical, Relationship-Based Approach Over Formal Certifications

For some, there's an emphasis on working closely with suppliers rather than focusing strictly on certifications:

“There is not a large focus on specific certifications linked to sustainability but working with existing suppliers to ensure we are constantly improving product and route to market to make both more sustainable.”

THEME 2: Internal Systems and Engagement in Place

For others, there is more structured engagement:

“We engage regularly with all potential direct import suppliers on sustainability and have a database of certifications.”

THEME 3: Centralised or Delegated Responsibility for Sustainability

Often certain responsibilities, particularly strategic or high-level ones, are handled externally or by a parent company:

“Our UK parent handles most of this as a bigger team.”

THEME 4: Customer-Driven Understanding and Action

Sustainability practices tend to be reactive or shaped by customer demands:

“If a specific customer type requires particular specifications around sustainability, it has an effect on decision making.”

4 ATTITUDES TO ALTERNATIVE PACKAGING

The survey asked buyers about stocking practices and attitudes to alternative packaging, internally and for their consumers, and found a tentative openness to alternative packaging, though one that is led (or hindered) by low consumer demand and concerns.

What did we ask?



Do you stock any wines in alternative packaging formats, or would you consider it?

Do your customers ever look for alternative packaging (e.g. bag-in-box, cans, wine-on-tap) and what related feedback do you hear?

Kevin O'Callaghan and Robert Joseph discuss some key purchasing factors for consumers in the on and off trade at the Sustainability & Wine in Ireland report launch, 03 March 2026



What did we learn?



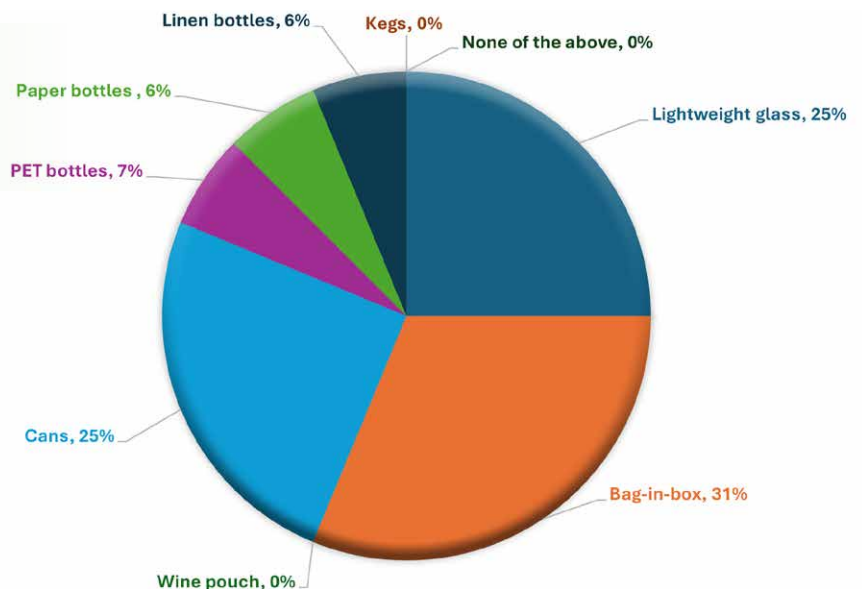
All surveyed already stock some wines in alternative formats. All stock **bag-in-box** as the most popular packaging, most (80%) also stock **light weight bottles and cans**, and there is a small presence in these multiples of other alternative bottle formats such as PET, paper or linen bottles (20% each).

Some are focused on increasing alternative packaging, with a dedicated programme, while others are open to considering new formats if they become more mainstream.

In terms of customer demand, there was an equal divide between customers never or only **occasionally** seeking out alternative packaging.

Buyers have heard **generally positive feedback**, especially about BIB, and despite some concerns from customers that alternative packaging options look cheap compared to glass, or worries about damage to the product, they say consumer **views tend to change once they try the product**.

ALTERNATIVE PACKAGING FORMATS THAT BUYERS STOCK



5

CHALLENGES, BARRIERS AND OPPORTUNITIES FOR IMPROVING SUSTAINABILITY, INCLUDING OPENNESS TO COLLABORATION



The survey explored sustainability related goals and challenges and the possibility of collaboration, to which buyers were tentatively open.

What did we ask?



What **short-term sustainability goals** were these companies working towards in 2025?

Have they **previously collaborated** with other importers, producers or retailers on sustainability initiatives and if so, in what capacity?

Are they open to **future collaboration** with others in the wine trade, including competitors, to advance sustainability within the Irish wine sector? What would they need to make future collaboration possible and did they have any other ideas, frustrations, hopes or concerns to share?

What did we learn?



When we asked buyers about their businesses **immediate or short-term goals**, certain themes arose:

Emerging Strategy: Sustainability is in its formative stages, with outside help enlisted.

Unclear External Communication: There's little evidence of public messaging or stakeholder communication at this stage.

Lack of formal strategy: Tactical (not strategic) actions do exist, such as reducing packaging or transport miles, but are not typically tied to a formal strategy.

Limited Internal Visibility: Not all staff are familiar with the framework or actively involved in implementation.

This indicates that sustainability strategies are in early stages, and would benefit from joined up thinking and clearer communications internally and externally.

Focus on: Collaboration

Previous collaborations with other importers, producers or retailers on sustainability initiatives have been **limited** to product **promotions** (presumably of sustainable wines), or working with producers to **reduce packaging**.

All buyers were **open to future collaboration** with others in the wine trade, including competitors, to advance sustainability within the Irish wine sector.

However, any such action would require industry-wide input including from suppliers as well as trade. Given the breadth of the topic, a cross-industry working group would need a **clear agenda and measurable actions** in order to see change. There was also concern expressed that any discussion and activity would need to fit their own company agenda/policy; support would be conditional to aligning with internal business values.

Practical supports to address what is seen as a lack of knowledge at all levels would be welcome. These include support to increase knowledge and education, certification guidance and carbon measurement tools.

Worth noting

In the case of the other industry cohorts (trade and suppliers), most respondents were key decision makers in the business. In the case of the buyers for large international companies, strategy decisions around issues such as sustainability are often being made at senior management level – and support for cross-industry collaboration would be conditional to aligning with internal business values.



SUSTAINABILITY & WINE IN IRELAND: CROSS SURVEY ANALYSIS

This comparative analysis addresses various elements from the four surveys, from what 'sustainable wine' means to each cohort, to levels of engagement with and attitudes to sustainability in wine, certification and accreditation, regenerative, organic and biodynamic viticulture, alternative packaging and carbon emissions.

This section concludes with a focus on common challenges, barriers and opportunities including communication, education and training, and price sensitivity.

1

DEFINING 'SUSTAINABLE WINE': A COMPARATIVE ANALYSIS



Outlined below are the key terms with most agreement, disagreement and uncertainty across all groups, followed by key themes and comparative findings, and then a recap of each group and their differences.

Key terms across all groups:

Key terms with **strongest agreement overall** across all groups (70%+)

- organic farming practices
- environmentally friendly production
- certified / accredited as sustainable
- socially responsible labour practices
- carbon-neutral or low-emissions production
- energy-efficient or low-emissions packaging

Key terms with **most disagreement** across all groups (25%+)

- vegan
- no added sulphur
- 'natural' or additive-free
- low air-miles

Key terms with **most uncertainty** across all groups (15%+)

- regenerative farming practices
- biodynamic farming practices
- low air-miles

Combined responses to the definition of sustainable wine	Highly Agree	Moderately Agree	Overall agreement	Disagree	'don't know'
Socially responsible labour practices	39.2%	33.3%	72.4%	16.2%	11.4%
Organic farming practices	38.0%	41.1%	79.1%	15.0%	5.9%
Environmentally friendly production	35.8%	42.6%	78.4%	13.2%	8.5%
Certified / accredited as sustainable	34.5%	38.3%	72.8%	16.3%	10.9%
Carbon-neutral or low-emissions production	30.4%	40.9%	71.3%	18.1%	10.6%
Energy-efficient or low-emissions packaging	28.2%	42.6%	70.8%	18.2%	11.0%
Regenerative farming practices	28.0%	29.0%	57.0%	20.5%	22.5%
Natural or additive-free wine	26.9%	33.4%	60.3%	28.0%	11.7%
Biodynamic farming practices	22.5%	37.1%	59.6%	20.5%	19.9%
Low air-miles	21.0%	37.7%	58.8%	25.4%	15.8%
No added sulphur	20.2%	32.0%	52.2%	34.2%	13.6%
Vegan	9.5%	28.8%	38.3%	43.6%	18.0%

Key themes and comparative findings

Importers have generally high consensus over and support for most sustainability terms.

Wine buyers are a confident group, with very little uncertainty.

Trade have higher 'don't know' responses (≈11%) than other wine professionals.

Consumers are generally less informed and more sceptical, with higher 'don't know' and disagreement rates suggesting education gaps. Terms like regenerative farming and biodynamic are less familiar to them than to wine professionals.

Agreements re specific terms

Based on the responses from all groups combined, '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.

Socially responsible labour practices are seen as central to sustainability for wine buyers (100% strongly agree) and importers (79%) and trade (70%), while consumers are more ambivalent (only 27% strongly agree, although 64% agree overall).

Organic farming is well recognised by consumers and understood by them as a key element in sustainable wine (74% overall agreement); trade also value it highly (90% overall agree, 53% strongly), especially for its resonance with consumers, as do buyers (83% overall, 50% strongly) while importers give it credence (97% overall, 62% strongly) but with less enthusiasm than they have for regenerative viticulture (100% overall, 82% strongly). **Regenerative** viticulture was very strong in agreement amongst importers and buyers but lower in trade and consumer, bringing down its overall agreement across all groups.

Divisions re specific terms

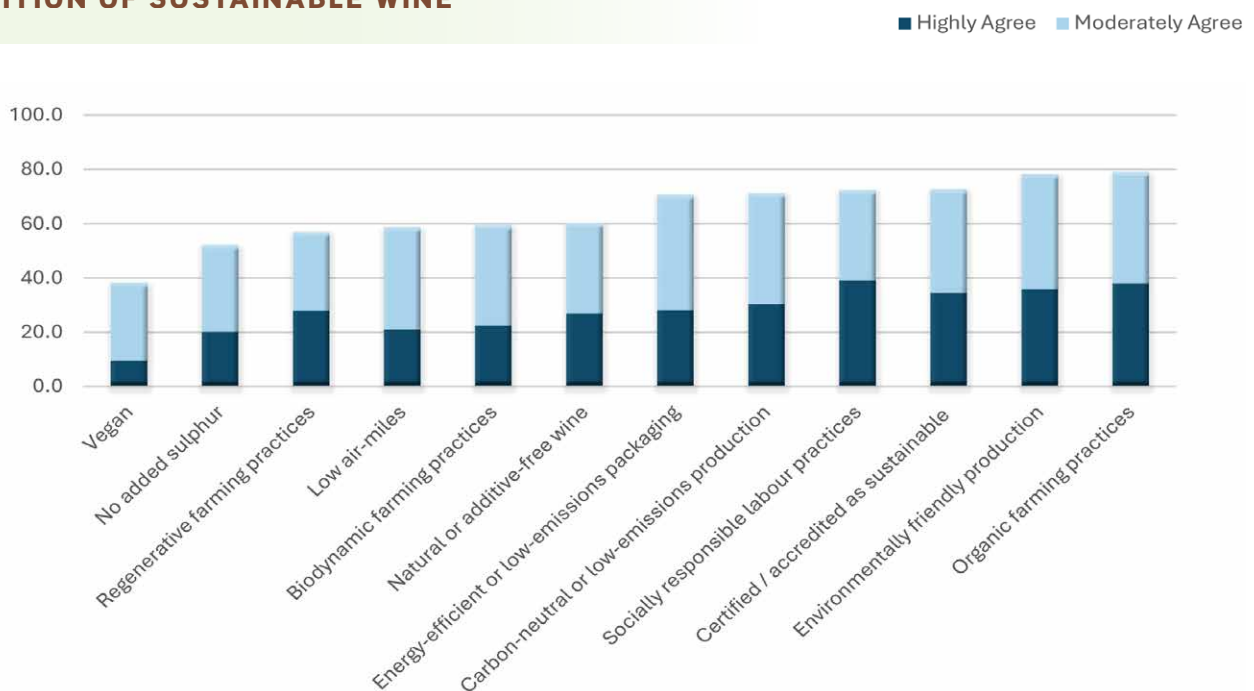
Opinion is divided about **'natural', additive-free wine or no added sulphur** – consumers and buyers/importers disagree more on these, highlighting a split between niche 'natural wine' trends and mainstream sustainability.

Vegan wines are divisive in a sustainability context, with consistently lower agreement and high disagreement, especially among consumers (48% disagree). Vegan certification doesn't resonate as strongly as environmental or social practices in a sustainability context.

Uncertainty re specific terms

There is relatively high disagreement but also uncertainty around the **impact of air miles** – as well as around both **biodynamic and regenerative farming** practices, which are better understood by wine professionals than consumers.

COMBINED RESPONSES TO THE DEFINITION OF SUSTAINABLE WINE



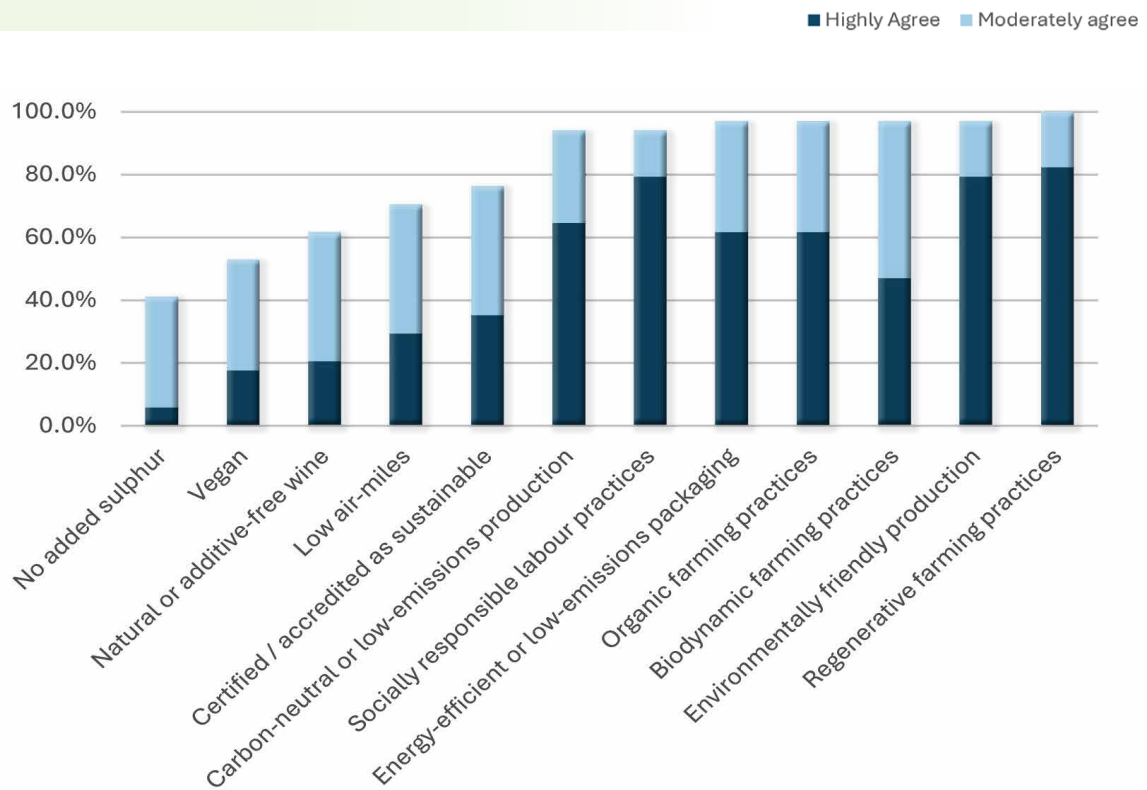


Group-by-group differences: Recap at a glance

Importers' Responses re: Defining 'sustainable wine'

- Very high agreement overall, with much lower disagreement compared to consumers and more general consensus across most terms.
- Regenerative farming (82% strongly agree), environmentally friendly production (79%), organic (62%), carbon-neutral (65%).
- Socially responsible labour practices are also very high (79%).
- The only divisive terms were no added sulphur (50% disagree), vegan (38%) and 'natural' or additive-free wine (35%).
- The only weak spots in terms of uncertainty were low air-miles (9% 'don't know'), vegan (9%) and no added sulphur (9%).

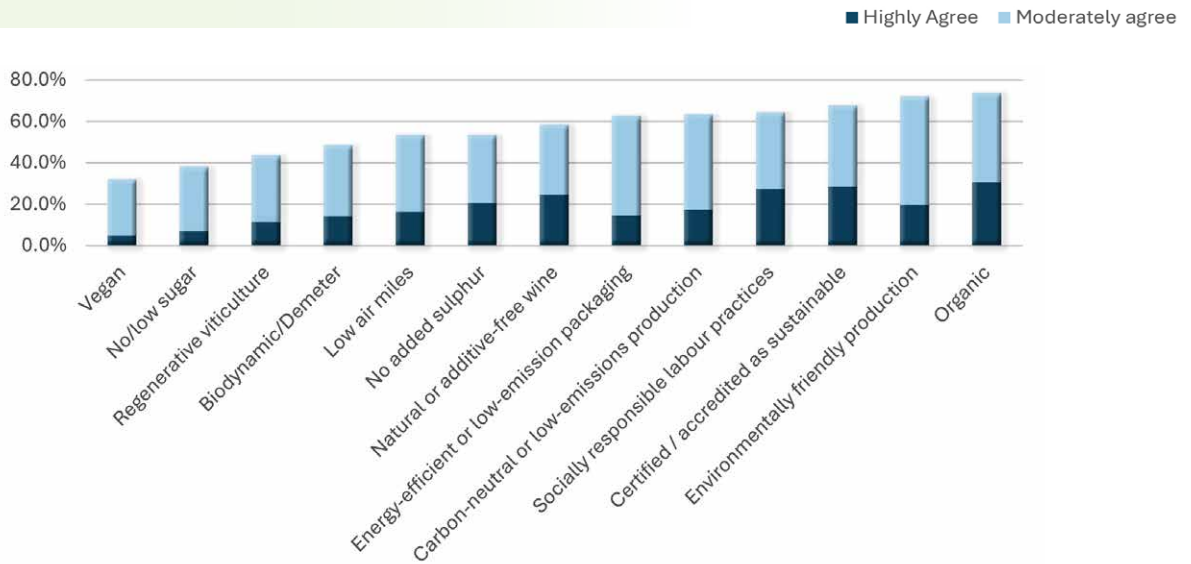
IMPORTERS RESPONSES TO THE DEFINITION OF SUSTAINABLE WINE



Consumers' Responses re: Defining 'sustainable wine'

- Most divided group in understanding of sustainable wine (but also the largest sample size).
- The agreement is lower overall, with only 18% strongly agreeing on average, compared to ~50% for trade/importers.
- High 'don't know' levels (16%) and higher disagreement (28%).
- Consumers value organic (30% strongly agree), sustainable certification/accreditation (28%), and socially responsible labour (27%).
- Regenerative viticulture is less understood (28% disagree, 28% 'don't know'); biodynamic practices have slightly higher levels of recognition and understanding (26% disagree, 25% 'don't know').
- Sceptical about vegan wines (48% disagree) in a sustainability context and no/low sugar (43% disagree).

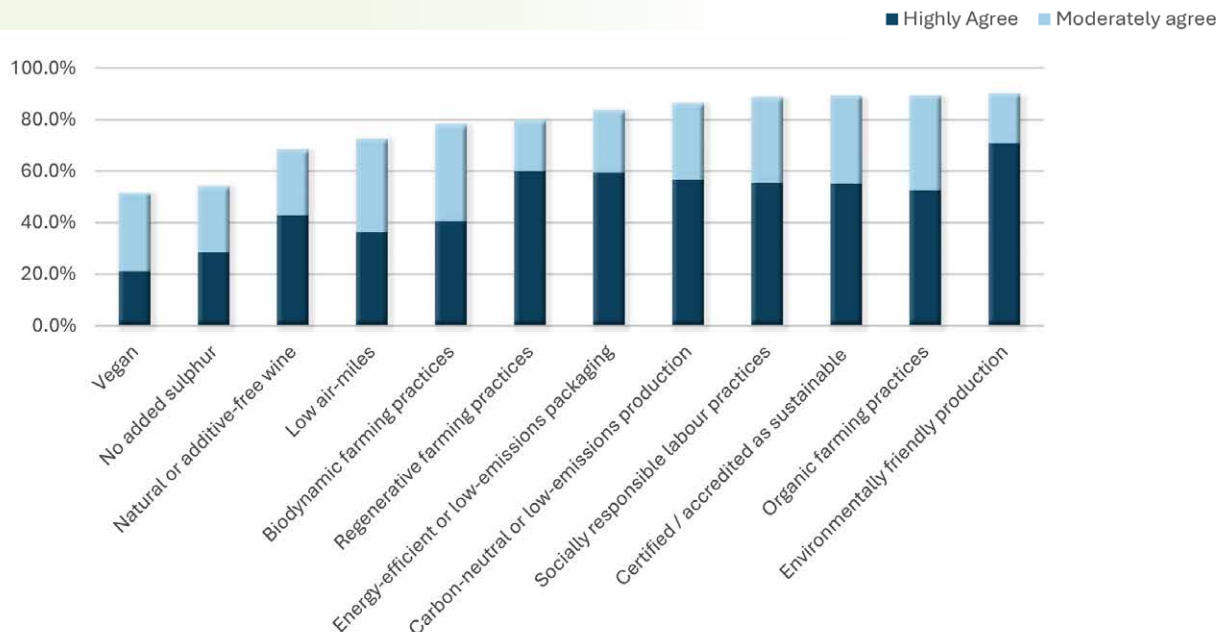
CONSUMERS RESPONSES TO THE DEFINITION OF SUSTAINABLE WINE



Trade Responses re: Defining 'sustainable wine'

- Strong support for environmentally friendly production (71% strongly agree) and regenerative farming (60% strongly agree).
- More divided on vegan and no added sulphur with high disagreement for both (33% for vegan, 34% for no sulphur).
- Answers are generally balanced, but with some 'don't know' responses (11%), as some practices are less understood, notably regenerative and biodynamic farming and also the impact of air-miles.

TRADE RESPONSES TO THE DEFINITION OF SUSTAINABLE WINE

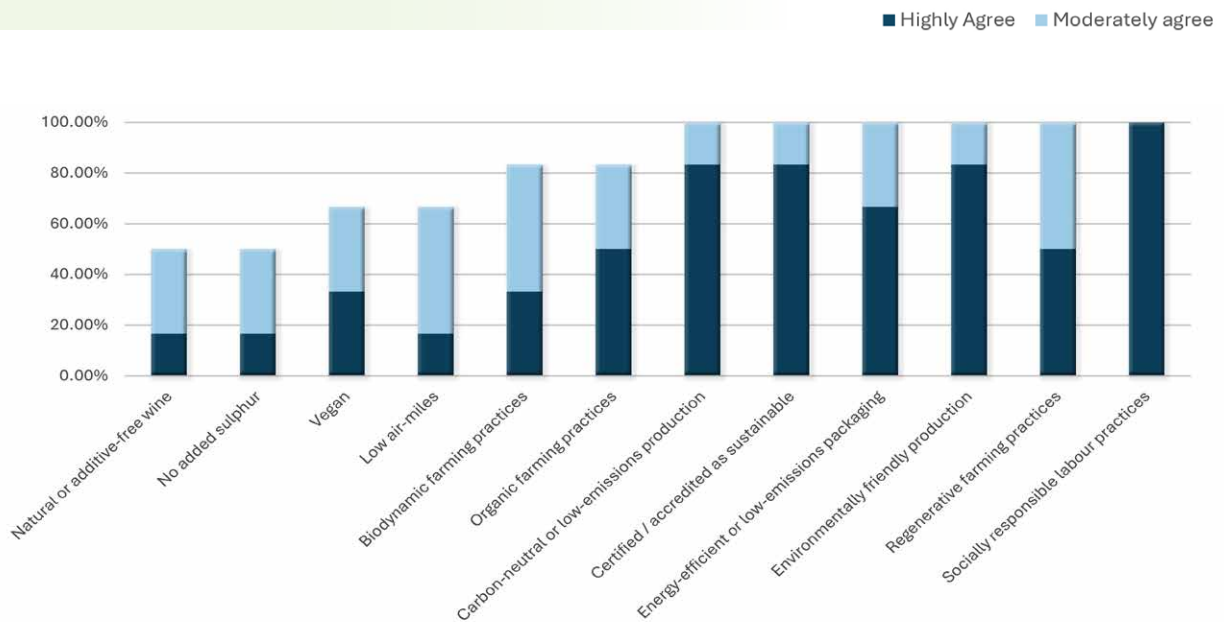




Buyers' Responses re: Defining 'sustainable wine'

- Most enthusiastic group about sustainability credentials in general, with very high agreement on many terms (similar to importers).
- Buyers feel confident in their understanding, with the only 'don't know' response relating to the relevance of vegan wines in a sustainability context.
- Carbon-neutral/energy-efficient/low-emissions production and packaging, sustainable certification/accreditation, and environmentally friendly production all have 83% strong agreement.
- Socially responsible labour practices get 100% strong agreement – the highest score across all groups.
- Sceptical about natural/additive-free wines and no added sulphur (50% disagree).

BUYERS RESPONSES TO THE DEFINITION OF SUSTAINABLE WINE



2 COMPARATIVE ATTITUDES TO AND ENGAGEMENT WITH SUSTAINABILITY IN WINE

Below you will find an overview of engagement levels across the four cohorts, followed by overviews of comparative attitudes to sustainability certification and accreditation; regenerative viticulture; alternative packaging; and carbon emissions. Finally this section also looks at comparative attitudes to and practices around communication, education and training about sustainability in wine.

Comparative engagement levels

Engagement levels are mixed across the **four cohorts**, as we have seen above regarding the support for and understanding of sustainability terms.

- **Consumers** report high levels of interest (or at least like to consider themselves interested) but show gaps in understanding of certification and of technicalities. The strong perception across all industry respondents was that consumers need more education or are not interested. Taking into account the phenomenon of ‘social desirability bias’ (whereby respondents in a survey say what they’d like to think they do rather than what they really do), that desire to be someone who considers sustainability in their wine choices could be appealed to as the hook for education and engagement.
- **Trade** is largely driven by consumer interest and demand, which they see as minimal, but also by wanting to do the right thing. However time and resources are barriers.
- **Buyers** are likewise driven by consumer interest and demand, which they see as low, but also by broader internal company policy which values sustainability highly, typically as a key or core business value. Taken as a group, formal strategies are still developing and in early stages although some have systems in place to support their sustainability policies.
- **Importers** are very engaged with sustainability and are more self-driven than buyers or trade.

Comparative attitudes to sustainability certification and accreditation

Attitudes to sustainability certification and accreditation are mixed across the four cohorts.

- **Consumers** have a mixed attitude to accreditation and certification. On the one hand, they say that bottle labels and clear simple messages are the best way to reach them in a retail setting. However accreditation and certification are not big drivers of purchases compared to how the wine tastes and whether it has been recommended to them etc. Sustainability credentials can be seen as a complementary bonus but not the driving benefit, one that elevates rather than defines the experience.
- **Buyers** also have a mixed attitude to accreditation. They recognise that certification has a value in communicating credentials to the end consumer. However some also emphasise the importance of relationships with suppliers over

formal accreditation – as do importers and trade, especially in the case of smaller producers for whom the cost of accreditation can be prohibitive.

- **Importers** rate sustainability certification and accreditation low in relevance (around 12.5%), valuing on-the-ground practices over formal accreditation. They see that certifications are ‘helpful for consumers’ but also that sustainability certifications and environmental impact reporting can be prohibitively expensive for small producers, despite a view that small and family-owned producers are often more naturally aligned with sustainability.
- **Wine trade** also has divided attitudes to certification. Some see it as essential accountability while others prefer to rely on personal judgment and knowledge of practices. They identify organic certification as being the strongest driver of consumer sales in terms of sustainability credentials.

In general, the closer the relationship with the source of wine, the less need there is for formal accreditation and the greater the reliance on trust and knowledge of actual practices – but for the average consumer, 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.

Comparative attitudes to and knowledge of regenerative viticulture

Regenerative viticulture generally has strong support amongst wine professionals, with especially strong support from importers (100% overall agreement, 82% strongly agree) and buyers (100% overall, 50% strongly), but also wine trade (80% overall, 60% strongly) who deem it a moderate influence on their purchasing decisions (similar to organic certification and biodynamic farming).

Despite this support, there is low recognition and understanding of it amongst consumers in particular (44% overall agree, 28% disagree, 28% ‘don’t know’), and amongst some wine trade (17.4% ‘don’t know’).

There is an overall desire by importers to encourage and support regenerative practices. Over half report it as something their partners already practise and promote, and over 40% say it is a positive influencing factor in selecting or listing a winery, and that it should be encouraged through discussions with suppliers, wineries and trade partners. However a quarter feel it is confusing to customers or that they themselves are keen to learn more, highlighting the need for education in the practice.

Biodynamic practices and accreditation have similar if slightly higher recognition and understanding amongst consumers (49% overall agree, 26% disagree, 25% ‘don’t know’) compared to regenerative viticulture.



Among wine professionals, biodynamic practices have overall support (Importers 97% overall, 47% strongly; Buyers 83% overall, 33% strongly; Trade 78% overall, 40% strongly) but with less enthusiasm than for regenerative viticulture or organic. There is some lack of understanding of biodynamic practices amongst trade (13% 'don't know').

Organic credentials, in comparison, see less enthusiasm from importers (97% overall, 62% strongly) than for regenerative viticulture, but consumers significantly more (74% overall, 31% strongly). Buyers are less convinced by organic credentials (83% overall, 50% strongly) and trade has fewer strong supporters of organic (90% overall, 53% strongly) than regenerative viticulture.

In conclusion, regenerative viticulture is highly valued by importers (also buyers/trade) but less known/understood across all sectors. Organic is still clearly more established, recognised and understood amongst the mainstream as a sustainable wine credential compared to regenerative viticulture or biodynamics. However regenerative viticulture has notably high support amongst wine professionals compared to organic and biodynamic (in that order); while some of the value given to organic by professionals is due to its value for consumers.

Comparative attitudes to alternative packaging

Importers report an openness to alternative formats exists (two thirds already stock lightweight glass; one third stock bag-in-box; one quarter stock cans) but consumer acceptance and quality concerns limit progress.

Wine buyers' attitudes to and adoption of alternative packaging is led (or not) by consumer demand and concerns – although some report that consumers do respond well to promotions. Currently all stock bag-in-box, most stock lightweight bottles and cans (80%) and some experiment with PET, paper or linen alternatives (20%).

Trade is ambivalent about alternative packaging with a high level of disengagement regarding the sustainability impact of glass bottles. This reflects a wider pattern of sustainability being seen as having to compromise e.g. on price, quality, tradition or aesthetics. Trade reports that customers don't ask for alternative packaging (but remembering the profile of trade respondents was 2:1 on-trade to off-trade). However, trade do say they would welcome clearer guidance about the environmental impact of various packaging options, especially given the complexity of topics such as the carbon footprint of the life cycle of the bottle.

Few **consumers** actively consider packaging sustainability. Lightweight bottles were ranked number by over half of consumers (54%) in terms of which alternative packaging they'd most likely choose, a strong lead on bag-in-box (11%) or wine on tap (8%).

Glass bottle weight is largely unknown as a sustainability issue – but it represents an opportunity for easy win, as over two thirds say that knowing a lighter bottle benefits the environment would make them more likely to choose it. Other alternative packaging have an appeal of convenience, including volume, portability and disposability; personal benefit is key to driving purchases of alternative packaging.

There is room for myth-busting regarding associations between bottle weight and quality, and for education about the complexity of recycling glass as a high-inputs process with high GHG emissions, and the direct association of the transportation of heavier bottles with GHG emissions. One approach could be to frame the adoption of lighter-weight bottles as a positive action that is being taken by wine producers, importers and trade and that can be easily supported by consumer choice – the personal benefit being an absence of pain for consumers.

Looking at all cohorts combined, lighter bottles are the leading alternative packaging in terms of current stocking practices amongst importers (66%), buyers (80%) and trade (33%), and they are the alternative packaging consumers would most likely choose (54%).

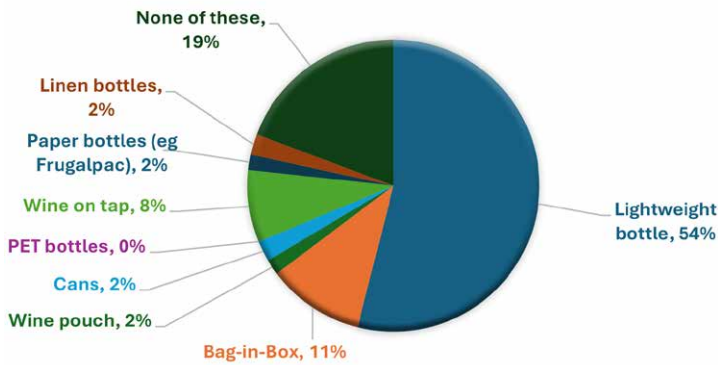
See below for pie-charts representing the proportional presence of the various types of alternative packaging stocked amongst the trade, multiples or importer businesses surveyed. (Note that these differ to the percentages cited elsewhere of how many businesses stock each type of packaging, given that some businesses will stock more than one type.)

These percentages represent the proportional presence of the various types of alternative packaging found amongst the trade businesses surveyed.

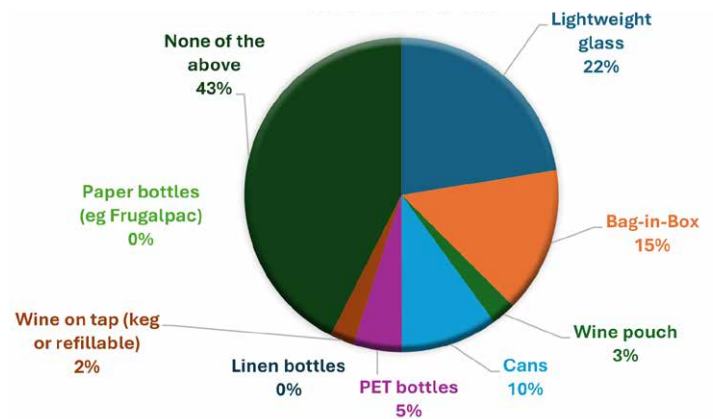
In conclusion, buyers and importers are open to alternative packaging although trade say consumers don't look for it, but consumers do seem open (if available, and personal benefits key) – plus buyers say consumers respond well to promotions.

There is ambivalence amongst trade around glass bottle weight as a sustainability issue matched by lack of knowledge amongst consumers but existing support amongst importers/buyers (two thirds stock lightweight bottles) makes a focus on bottle weight reduction a potential opportunity – especially in the context of findings from IWCA's GHG Hotspot Map and SWR's Bottle Weight Accord as outlined in this report's introduction.

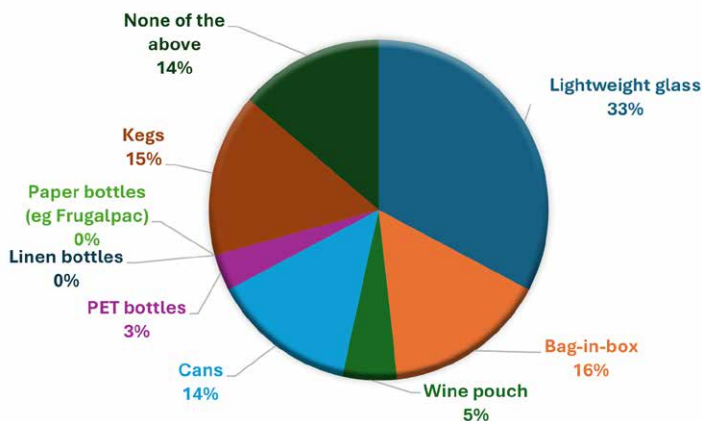
CONSUMERS' RANKED NUMBER 1 ALTERNATIVE PACKAGING



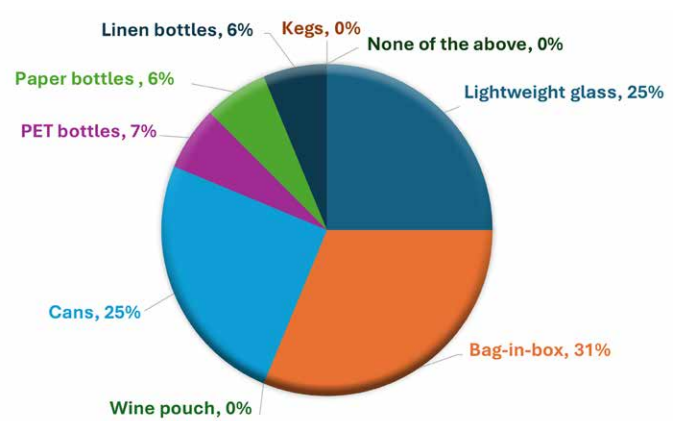
ALTERNATIVE PACKAGING FORMATS THAT TRADE STOCK



ALTERNATIVE PACKAGING FORMATS THAT IMPORTERS STOCK



ALTERNATIVE PACKAGING FORMATS THAT BUYERS STOCK





Comparative attitudes to carbon emissions

Carbon emissions (of packaging and production) and air miles are low on the agenda for **consumers**, both in terms of what sustainability terms, if any, they would look for when reading a wine label and in their general definition of sustainability. Also a wine's country of origin is not an influencing factor on consumers' purchasing decisions for sustainability reasons, and most respondents have never considered the question – although a small minority (18%) strongly agree that 'Yes, I always try to buy as local as possible in food and beverage choices'.

That consumers are generally not thinking about emissions-related implications of transportation can be seen as both a barrier (not on their radar so they don't care) and an opportunity (no preconceived ideas to turn on their heads) – especially when considered alongside the finding that two thirds of consumers would be more likely to choose a lighter bottle if they knew of benefits to the environment.

Importers report a gap between awareness of carbon emissions and practical data access. While most say that they both value and feel informed about suppliers' and wineries' efforts to lower carbon footprints, actual supplier data is often lacking.

In terms of what sustainable wines means to importers, low air-miles was one of the few terms associated with any uncertainty (9%), and with relatively high disagreement rates (21%). There was near full support overall for both carbon-neutral or low-emissions production (65% strong agreement) and energy-efficient or low-emissions packaging (62% strong agreement).

Buyers also report a gap between their wine suppliers being well informed regarding the carbon footprint associated with their wines, and that knowledge and data being shared with the buyers themselves.

In terms of what sustainable wines means to buyers, carbon-neutral or low-emissions production (83% strong agreement) and energy-efficient or low-emissions packaging (67% strong agreement) had high support while 'low air-miles' saw the highest disagreement (33%).

As you can see in the pie charts opposite, both buyers and importers were more likely to proactively consider transportation mode in particular as a sustainability factor when importing wines than to proactively consider the carbon footprint in general of those wines.

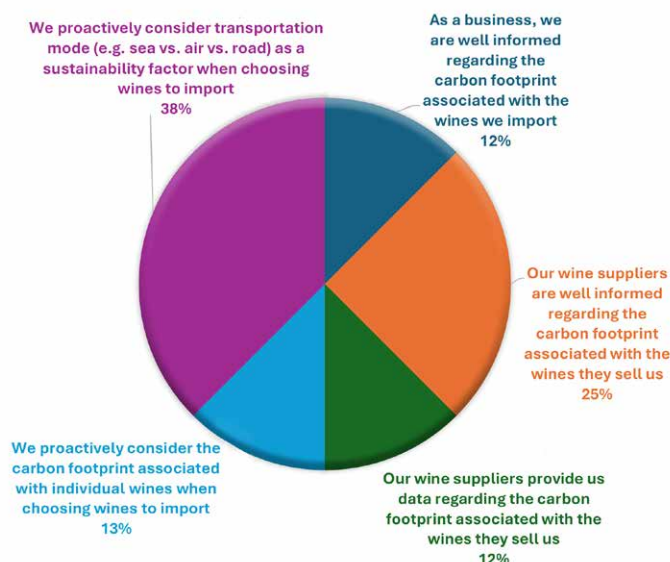
When **trade** were asked to choose what sustainability factors most affect their purchasing decisions the availability of specific carbon information was one of the highest influencing factors. In terms of what sustainable wines means to trade, carbon-neutral or low-emissions production (57% strong agreement) and energy-efficient or low-emissions packaging (59% strong agreement) had reasonably high support although with some uncertainty around them (11% 'don't know' for both) while 'low air-miles' saw lower support (36% strong agreement) and higher uncertainty (15%).

Scopes 1, 2 and 3

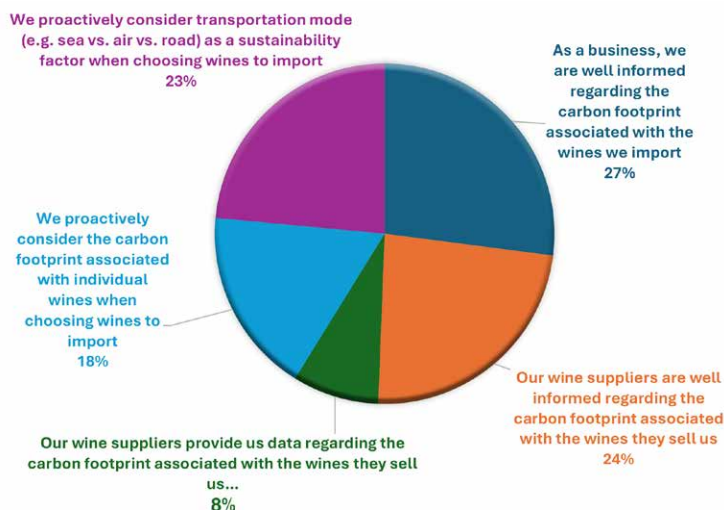
There is a greater understanding generally amongst consumers and professionals alike of the impact and relevance of Scope 1 activities on the carbon footprint of wine, with a primary focus on vineyard activities and to a lesser degree winery production operations, than on the less romantic factors of Scope 3 (packaging, transportation, outsourced elements) – despite the latter accounting for 80% of wine-related emissions. [20]

In conclusion, there are mixed messages from respondents around carbon emissions. With relatively high value given to low-emissions production/packaging by all but with the impact of air miles being more divisive; plus gaps in knowledge/understanding (trade/consumers) and actual supplier data (importers/buyers) despite feeling well informed about efforts to lower carbon footprints.

PROPORTIONAL SUPPORT FROM BUYERS FOR STATEMENTS REGARDING CARBON FOOTPRINT



PROPORTIONAL SUPPORT FROM IMPORTERS FOR STATEMENTS REGARDING CARBON FOOTPRINT



3

COMPARATIVE CHALLENGES, BARRIERS AND OPPORTUNITIES

Below is a comparative overview of various challenges, barriers and opportunities that arose as themes across the four cohorts. These include

- attitudes to communication and messaging, education and training, knowledge gaps and knowledge sharing,
- price sensitivity and commercial value of sustainability,
- tentative openness to industry collaboration, and
- other challenges, barriers and opportunities.

Communication/message gap

Even where sustainability is of high importance to a business (buyers/trade) and consumer education about sustainability in wine is seen as needed, **there is most often little to no communication about sustainability beyond accreditation on the bottle (buyers for multiples) and sometimes one-to-one conversations instigated by staff (trade)**. Labelling information has the benefit of being the kind of simple and clear messaging that consumers say they want, but is not a strong influence on purchasing decisions compared to wine choices with clear personal benefits.

However those businesses who do communicate on sustainability or promote sustainable choices report positive consumer feedback and responses. There is also an acknowledgment that many **consumers are on a 'journey' in terms of understanding and adopting sustainability in wine, and need education and guidance to do so**.

Communication with consumers from trade respondents is more nuanced. Reflecting that this cohort is made up 2:1 of on-trade (primarily restaurants) and off-trade (independents), they report that consumers respond well to and appreciate professional guidance, information and education and a well-considered selection (stocking/list) of sustainable wine. **Digital platforms (social media, newsletters, online) are underused as a platform**, which could potentially be leveraged to educate customers and staff alike.

Given the dominance of supermarket and other multiple retailers in terms of consumers' wine purchases, and given the sensitivity of consumers to value-based promotions, this sector could be key in terms of reaching the consumer about sustainability in wine. **Multiples are well placed for consumer education campaigns** and promoting change in buying habits with simple and clear messaging.

However **on-trade and smaller independent retailers** would also be key to messaging in terms of their **direct communication with consumers for more nuanced / higher-level awareness** around sustainability. They typically have more time for one-to-one conversations, plus an alignment with sustainability efforts/philosophy in food provides a broader, relatable context.

Education and knowledge sharing

Importers highlight education about sustainability – its meaning, benefits and associated costs – as being critical for both trade stakeholders and consumers to increase adoption of sustainable practices and choices. **Consumer awareness campaigns could also target problematic industry practices like over-packaging or heavy bottles**.

Trade highlighted a lack of consumer understanding as one of the highest barriers to becoming more sustainable as a wine-related business. And while cost is seen as the highest barrier to sustainability, it is the opportunity for education that resonates most with trade in terms of supports or collaborations that would be welcome.

They welcome more detailed information from importers regarding the sustainability of wineries, clearer guidance about the environmental impact of various packaging options, and more education generally including staff training and consumer-friendly educational materials.

The high desire for knowledge and insights sharing, training, education and tasting events expressed here links in with the need expressed elsewhere by trade, but also by buyers and importers, for educating and raising awareness amongst consumers, and for the sharing of clear information amongst trade and also the media.

Buyers also welcomed practical supports to address what is seen as a lack of knowledge at all levels, including supports to increase knowledge and education, certification guidance and carbon measurement tools.

Training and tastings

While most of the trade respondents' companies do educate or encourage awareness amongst employees regarding sustainability in wine, in an unstructured way, there is an opportunity for staff training around sustainability and sustainable sourcing practices – perhaps through collaborating with other businesses on best practice. **A call for trade and consumer tastings highlights a parallel opportunity for raising consumer awareness while educating trade**.

Consumer knowledge gaps

Potential areas for consumer education include

- **regenerative viticulture**, especially given the high support amongst importers for its place in a definition of sustainability,
- the **complex relationship between the carbon emissions impact of air-miles vs land-miles vs land-miles**, and its relationship with **bottle weight**, and
- there could also be an **opportunity to draw out stories of social equity and the inherent expense of responsibly made wine**, given consumers' stated interest in supporting socially responsible labour practices.



Outdated myths linger but could be flipped into **new messages**: for example, from ‘heavy bottle correlates to quality wine’ to ‘lighter weight bottles reflects other sustainability-related commitments through the wine production and supply chain’, aka ‘**lighter bottle correlates to quality wine**’.

Price sensitivity and commercial value of sustainability

What sells sustainability and is it a driver of purchasing decisions for professionals and consumers?

Consumers: Price sensitivity is nuanced

Sustainability labelling and certification influences consumer wine purchases less than familiarity, novelty and value, and only 15% of consumers say certifications/logos would make them more likely to buy a wine – trade perceptions echo this, saying sustainability is largely unimportant for consumers and that only ‘organic’ status drives sales.

Consumers care more about enjoying their wine than any potential positive impacts on the environment or personal health. Personal benefits influence purchasing decisions (making life easier / enjoyment); the personal benefit for consumers of choosing sustainability could be the absence of pain (one less thing to feel bad about).

Consumers (~65%) believe sustainable wines cost more, but **three in four are willing to pay extra, although amounts vary widely** (€1–€5) and conscious purchases of sustainable wines are occasional rather than regular. Consumers seem to be willing to pay more if they feel like they’re getting value.

Price is an incentive in wine purchases (consumers like to buy on promotions) but **not a barrier to choosing sustainable wine**: understanding the value of those choices is arguably a greater barrier. That value has the greatest resonance when it comes with near personal benefit (guaranteed enjoyment vs far-off benefits to personal health or environment).

Importers: Balancing Sustainability with Commercial Realities

Sustainability influences purchasing decisions (one third say sustainability always influences their import choices; over half say it often or sometimes does) but is balanced against quality, value/cost and traditional market expectations.

Importers also feel that their sustainability commitment is a consideration for their customers, but to varying degrees. One third judge it a key purchasing consideration of increasing importance (with a small minority reporting that all their suppliers have sustainability-related certification), while almost half judge it somewhat influential as one of various considerations.

There is also an awareness that **sustainability certifications and environmental impact reporting can be prohibitively expensive for small producers** (see above under certifications).

Trade: Purchasing decision drivers

While sustainability is a consideration in purchasing decisions (75%), these are primarily shaped by factors like consumer demand, financial viability, sourcing logistics, information clarity, trust in producers and winery reputation. **Individual preference and business practicality outweighs sustainability for many.**

Some respondents do make a strong positive association between the sustainability and quality of wines, and see it as increasingly relevant to consumers, while others report a lack of consumer demand.

Social responsibility was a strong influencing factor, along with the availability of specific carbon information, while vegan certification has very little influence on purchasing. The following had a moderate influence on purchasing decisions: Organic certification, biodynamic, regenerative, social responsibility, carbon neutral, availability of specific carbon information, transportation, producers’ sustainability story and IWCA membership.





The Sustainability & Wine in Ireland report launch, 03 March 2026, RDS

Buyers: Balancing Sustainability with Economic Realities

The feeling is that customers do sometimes care about sustainability when buying wine, and most especially around issues of ethics, packaging and organic production. However one observation that customers think all wine is sustainable highlights a lack of consumer knowledge.

Most companies tend to choose wines according to each producer's overall environmental commitment. A small cohort tends to favour wines from certain regions or countries for sustainability reasons (such as carbon impact of transport logistics, farming practices, etc). **Accreditation does not feature as a strong driving factor.**

The sustainability factors with most influence on purchasing decisions are: social responsibility, producers' sustainability story, B Corp, biodynamic practices, organic farming, low intervention, regenerative practices, carbon neutral.

While sustainability is clearly valued and integrated into company-wide operations and sourcing as a core business strategy, there is an acknowledgement of practical constraints, especially around international sourcing (air miles, carbon footprint) and cost pressures, reflecting a tension between sustainable ideals and commercial feasibility.

In general, looking across the four cohorts, there is an acknowledgement that the commercial value of sustainability in wine is nuanced, as is the price sensitivity of consumers. Price is a greater incentive in wine purchases than sustainability certifications but not a barrier to choosing sustainable. While there is for some a positive quality association with sustainable wine and a willingness amongst consumers to pay for it (occasionally at least), there is also the acknowledgement of the cost implications of certification and emissions reporting etc., and that these can be prohibitive for smaller producers.

Tentative openness to industry collaboration

Buyers are open to cross-industry collaboration with clear agendas and measurable goals, albeit that these would need to fit with internal business strategies. There is a common challenge to balance commercial realities with sustainable goals. Practical support through education, certification guidance and carbon measurement tools are welcomed – especially as sustainability strategies are in formative stages.

Trade are open to cross-industry collaboration (90%) but only a small minority (10%) see sustainability as critical to their businesses in the next 3–5 years (compared to a majority of 40% seeing it as 'somewhat important').

Trade sees cost as their highest barrier to sustainability, but education/guidance/training resonates most in terms of welcomed supports or collaborations. A call for trade and consumer tastings highlights a parallel opportunity for raising consumer awareness while educating trade. On-trade and independent retailers could be key to messaging and direct communication with consumers.

Importers are (mostly and tentatively) open to working together with peers, competitors and partners towards practical, measurable collaborative actions within the Irish wine sector, but stress the need for transparency, inclusiveness and neutral facilitation, and express concerns about adding extra strain on low resources (time, people, financial). Importers identify knowledge gaps – across consumers, trade stakeholders and media – as a barrier to wider sustainability adoption. Education is consistently highlighted as essential to advancing sustainability adoption and supporting tangible, practical action within the Irish wine sector. While most both value and feel informed about efforts to lower carbon footprints, actual supplier data is often missing.



Other challenges, barriers and opportunities

- Low resources cited by importers in terms of people/costs – they are already working hard to do the right thing, but are tentative about making further commitments.

- Greater focus from trade on financial viability, with sustainability a secondary concern – they want to do the right thing, but would welcome help, guidance and resources.

- Buyers potentially have greater resources (sustainability a core/key business value) but actions must align with internal policies with sustainability strategies in early stages.

- Knowledge gaps/need for education is a common theme, with room to increase knowledge at all levels of what makes a wine sustainable – from consumers through trade, buyers and importers to media, eg through staff training, certification guidance, carbon measurement tools and improved sharing of data (buyers).

- Consumer education needed to encourage consumer buy in – appealing to personal benefit is key.

- Cost concerns exist around sustainability measures driving prices up.

- Ease wins throughout – offering absence of pain through problem solving and measurable actions.

METHODOLOGY: FURTHER DETAILS

Section 1

Who was surveyed?

Below is an overview of each of the four surveys detailing their sample size, demographics, engagement and completion rates (noting that the average 'completion rate' on Typeform is 47%).

Importers' survey

This survey was fully completed by approximately 60% of respondents. Of the 49 respondents who opened the survey, **31 respondents** answered the first phase of questions and all but two of those completed all non-optional questions. (See below for further details.)

Of those 31 respondents, over half are key decision makers (including mostly Directors / Managing Directors / CEOs and also Owners / Founders); most of the other respondents are in Sales / Buyers / Commercial Roles, with just a few in other roles (e.g. Assistant, Sustainability, Ops).

Three-quarters of respondents represent small businesses of less than 10 employees. Their areas of speciality were identified as wines for on- and off-trade, followed by wines from Europe, with wines of all price points represented.

Consumers' survey

This survey was fully completed by 76% of respondents. Of the 230 respondents who opened the survey, **174 respondents** completed all questions. (See below for further details.)

The consumer profile of the typical respondent to this survey is female (80%) and aged between 36–65 years old (86%), with just 12% under 35 years old. They buy wine weekly (61%), most often in supermarkets (58%) but also independent wine shops (31%) with a small minority shopping online or in a local off-licence chain. They typically spend €10–15 on a bottle of wine (49%) but sometimes up to €16–25 (38%).

Over half reported that they like to try new wines and read labels (53%), which is arguably unusual for supermarket shoppers who are typically brand loyal; however a significant number reported that they usually stick to familiar brands (41%) and over a third (36%) are price-sensitive, often buying based on price or promotions.

Trade survey

This survey was fully completed by approximately 30% of respondents. Of the 75 respondents who opened the survey, 27 started it and **22 respondents** answered all questions. (See below for further details.)

About a third of respondents represent independent wine retailers (32%) and a similar number represented restaurants (30%), followed by hotels (20%). Others include pubs and bars, wine bars and cafes. This translates as a ratio of 2:1 in terms of on-trade to off-trade. The majority are key decision makers, with over half of them owners, a third of them general managers, and the others spread between purchasing or food and beverage management, and just a few working in consumer sales and purchasing.

Their average consumer is aged between 36–65 years old (77%), leaning more to the younger demographic of 36–45 (43%) and with just 17% aged 18–35 years old.

Nearly half of these businesses (47%) do not import any wines exclusively; but of the other half who do, nearly one third (31%) import upwards of half of their wines.

Buyers' survey

This survey was fully completed by 42% of respondents. Of the 12 respondents who opened the survey, **6 respondents** began the survey and 5 respondents answered all non-optional questions. (See below for further details.)

Most of these were buyers for over 50 stores, with just one a buyer for between 20–50 stores. Two thirds bought between 25–50% of their wine stock exclusively, and one third upwards of 50%. The majority buy wines at all price points, with wines from Europe and the Americas dominating over wine from the Antipodes and South Africa.

Section 2

Limitations and scope of surveys and report

In the interests of understanding the value of the primary research conducted for this report, below is an overview of some of its limitations, including data capture, completion rates and potential inbuilt biases to consider.

Engagement and completion rates

At first glance, completion rates of the four surveys were relatively low, with consumers the highest at 75%, followed by importers at 58%, buyers at 42% and trade at 29%. However, a closer look at these rates offers a more nuanced understanding of engagement levels, as outlined below along with some survey design features implemented to mitigate against respondent drop off.

Phased data capture

Anticipating the probability of some degree of drop off towards the final questions, we designed each survey to collect all data entered up to several stages in each survey. This phased approach helped maximise capture of data.



Optional qualitative questions

In order to balance our quest for nuanced information with a respondent's need for speed, we minimised qualitative questions and made these optional in order to maximise engagement and to allow respondents prioritise quantitative research questions. We asked more optional questions of importers and buyers, less of trade and just two of consumers. We also varied the length of the surveys, keeping the consumers' survey the shortest.

Reported completion rates

The average 'completion rate' on Typeform is 47%, calculated as the percentage of people who hit the Submit button at the end of the survey versus the number of those who opened the Typeform link. As there was a relatively high number of respondents who opened the survey but did not begin answering any questions, these completion rates are lower than if they were calculated on how many began the survey.

For example, of the 31 **importers** who provided full or partial answers to the survey (reflected as 58% completion rate of the 47 who opened the survey), 29 answered through to the third last (and final non-optional) question of 'Are you open to collaborating within the Irish wine trade to promote sustainable wine?.'

Likewise, of the 12 respondents who viewed the **buyers'** survey, six started the survey and five answered through to that third last question (reflected as 42% completion rate), some skipping optional questions.

For the **consumer** survey, 215 consumers started the survey, 174 answered through to the second last question, and 152 to the last question (reflected as 75% completion rate).

The **trade** surveys saw the lowest completion rates, at 29%, and the highest drop off. There was a notably high drop off during or directly after Question 5 (How would you define your company's understanding of 'sustainable wine?') in which respondents were asked to rate each element. Of the 75 trade respondents who opened the survey, 47 started the survey, 27 continued past that first complex question, and of those, 22 completed to the end of the survey – which is nearly half of those who started, and most of those who continued.

Overall, considered in the context of average Typeform completion rates and also in terms of lower drop off levels amongst those who actually began answering the surveys, engagement levels were considerably healthier than at first glance.

Potential inbuilt biases to consider

There are some potential biases to consider for each group, when assessing the scope and limitations of the findings.

Trade: This group had the smallest sample size relative to how many potential businesses might have engaged, and the lowest completion rate. However at the very least, it still provides a small snapshot and is indicative of the kind of insights that a follow-up (possibly slim-lined) trade survey could look like, if supported by numerous wine importers and circulated to all their trade partners and customers.

The high drop off outlined above reflects a time-poor cohort but also one with the most uneven motivation to take the time to complete the survey. However it is also possible or likely that those who did continue were motivated by their interest in matters of sustainability, whether personally or in terms of their businesses' values, which potentially gives the findings a positive bias in that direction.

It should also be borne in mind that, taken alone, the trade results are dominated by the on-trade over off-trade by 2:1. This is particularly relevant in questions regarding alternative packaging, for example. However, for what is a large number of parallel questions between the two, the results of the trade taken together with those of the buyers (representing multiple retailers and supermarkets) rebalance that to a 1:1 ratio.

Consumers: This cohort were engaged exclusively through Instagram which arguably shaped the resulting age demographic though not a geographic one.

It is worth considering the findings from consumers within the context of the phenomenon of 'social desirability bias', whereby respondents in a survey say what they'd like to think they do rather than what they really do. To some degree, consumers may be unreliable witnesses in terms of self-reporting. However, identifying the desires that could potentially drive decisions is a valuable insight in itself. That desire to be someone who considers sustainability in their wine choices is something that is there to be tapped into and appealed to – and is a potential hook for educating and engaging consumers further.

Importers: Wine importers were primarily invited by email to complete the survey, and the numbers suggest that most invitees at least opened the survey for a look. As we have seen, about half followed through with answers. While we 'don't know' all the reasons the other half didn't, we can assume that at least some of those who did answer the survey were – as with the trade – motivated by a shared interest in matters of sustainability, whether personally or in terms of their businesses' values, which potentially gives the findings a positive bias in that direction. By that logic, as with the trade, a larger sample size might well have shown lower levels of agreement around the definition of 'sustainable wine' and lower levels of understanding regarding issues of sustainability in wine.

Buyers: Wine buyers were also directly invited by email to complete the survey. The numbers suggest that most invitees followed through, but also that more than one person within the company opened and viewed the survey, hence skewing the completion rates.

This cohort represents the largest, more corporate companies, who have necessarily dedicated a significant degree of time and resources to defining their internal sustainability efforts and incorporating that into company policy and values. However their responses also show that these policies are still in early stages of development and implementation. As such, it is worth considering the degree to which some of their responses may be more aspirational than fully indicative.

In Conclusion

Of all the cohorts, the trade survey was the least robust in terms of its small sample size and low completion rate, and the consumer survey the most robust in terms of large sample size and high reported completion rate. However the importers and buyers were both highly engaged in terms of answering optional questions and follow through to completion by those who started.

Even with the above limitations, the survey findings provide strong insights.

SUSTAINABILITY & WINE IN IRELAND: KEY FINDINGS AT A GLANCE



Below are some of the key findings and themes arising out of the report. These can be read alongside the cross-survey analysis to give an overview of the report's findings, while the individual sections outlining each of the four surveys provide a more in-depth presentation of the findings.



Sustainability credentials

Regarding sustainability credentials, importers have generally high consensus over and support for most sustainability credentials. Wine buyers are a confident group, with very little uncertainty. Trade have higher 'don't know' responses (~11%) than other wine professionals. Consumers are generally less informed and more sceptical, with higher 'don't know' and disagreement rates suggesting education gaps. Terms like regenerative farming and biodynamic are less familiar to them than to wine professionals.



Defining 'sustainable wine'

Based on the responses from all groups combined, '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. Opinion is divided about 'natural', additive-free wine or no added sulphur – consumers and buyers/importers disagree more on these, highlighting a split between niche 'natural wine' trends and mainstream sustainability. Vegan certification doesn't resonate as strongly as environmental or social practices in a sustainability context.



Confidence and consensus

Engagement levels are mixed. Consumers are interested but with gaps in understanding. Trade is largely driven by consumer interest and demand, which they see as minimal, but also by wanting to 'do the right thing', in the face of barriers (time, resources, education). Buyers are likewise driven by consumer demand, but also by broader internal company policy which sees sustainability as a key or core business value, although formal strategies are in early stages. Importers are very engaged with sustainability and are more self-driven than buyers or trade.



Sustainability certification and accreditation

In general, the closer the relationship with the source of wine, the less need there is for formal accreditation – but for the average consumer, it 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.



Alternative packaging

Buyers and importers are open to alternative packaging although trade say consumers don't look for it, but consumers do seem open (if available, and personal benefits key) – plus buyers say consumers respond well to promotions.

There is ambivalence amongst trade around glass bottle weight as a sustainability issue matched by lack of knowledge amongst consumers but existing support amongst importers/buyers (two thirds stock lightweight bottles) makes a focus on bottle weight reduction a potential opportunity – especially in the context of findings from IWCA's GHG Hotspot Map and SWR's Bottle Weight Accord as outlined in this report's introduction.



Carbon emissions

There are mixed messages from respondents around carbon emissions, with relatively high value given to low-emissions production/packaging by all but with the impact of air miles being more divisive; plus gaps in knowledge/understanding (trade/consumers) and actual supplier data (importers/buyers) despite feeling well informed about efforts to lower carbon footprints.



Regenerative viticulture vs Organic vs Biodynamic

Regenerative viticulture is highly valued by importers (also buyers/trade) but less known/understood across all sectors. Organic is still clearly more established, recognised and understood amongst the mainstream as a sustainable wine credential compared to regenerative viticulture or biodynamics. However regenerative viticulture has notably high support amongst wine professionals compared to organic and biodynamic (in that order); while some of the value given to organic by professionals is due to its value for consumers.



Scopes 1, 2 and 3

There is a greater understanding generally amongst consumers and professionals alike of the impact and relevance of Scope 1 activities on the carbon footprint of wine, with a primary focus on vineyard activities and to a lesser degree winery production operations, than on the less romantic factors of Scope 3 (packaging, transportation, outsourced elements) – despite the latter accounting for 85% of wine-related emissions.



Personal benefits drive behaviour

Personal benefits influence purchasing decisions (making life easier / enjoyment); the personal benefit for consumers of choosing sustainability could be the absence of pain (one less thing to feel bad about).



Price sensitivity

Consumers willing to pay more (€1-5) BUT there is a major gap in communication of credentials. Price and promotions are incentives in purchases but not barriers to choosing sustainable wine: a lack of understanding of the value of those choices is a greater barrier. While there is for some a positive quality association with sustainable wine, there is also the acknowledgement of the cost implications of certification and emissions reporting etc and that these can be prohibitive for smaller producers.



Communication, education and training

A communication/message gap exists, in that even where sustainability is of high importance to a business (buyers/trade) there is little communication with consumers about sustainability in wine – however, positive consumer feedback to multiples who do promote/communicate on sustainability. Multiples are key to reaching consumers and changing mainstream behaviour, while on-trade and independent retailers could be key to messaging and direct communication with consumers for more nuanced / higher-level awareness around sustainability.



Give Wine
a Future