



SustainableWine
ROUNDTABLE

Wine Sustainability Standards Benchmarking

The Story So Far

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Introduction

This report presents SWR's latest findings in relation to its programme to evaluate the 40+ sustainability standards currently active in the global wine sector. It is based on evaluations of a further eight standards drawn from all parts of the world.

A members-only version of this report provides the detailed analyses and scores of each standard. This public report sets out the overarching findings of this process, offering insights into the challenges of implementing sustainability in the wine sector, and the role of standards and standards bodies in achieving this. Having now reviewed nearly 20 standards in detail, several clear themes are emerging which can inform both SWR's work and broader industry efforts to advance sustainable practices. Taken together, these themes point to a deeper understanding of what makes a sustainability standard effective. Not just credible, but usable.

This paper builds on a pilot report published in late 2024. As well as undertaking the evaluations, this pilot was used to test the robustness of our benchmarking approach and methodology. Some minor changes needed to be made, and have since been incorporated into our ongoing benchmarking process.

While standards benchmarking remains a central focus for SWR, it nonetheless represents just one part of our broader work. Several of the issues explored in this report have also surfaced in other projects. In particular, a considerable amount of further nuance and insight emerged from meetings at the Australian Wine Institute Technical Conference in Adelaide in July 2025, which Dr Peter Stanbury attended.



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The benchmarking process

Why is this needed?

There is a need for clarity in relation to wine sustainability standards. Such standards are meant to provide retailers, the end customer and indeed the whole industry with clarity about whether the wine in a bottle is produced sustainably or not.

However, with more than 40 sustainability standards in operation across the global wine sector, such clarity does not exist. Each standard differs, and until now, there has been no clear way to compare them or understand their similarities and differences. What we have, therefore, is an inconsistent understanding of what sustainability in wine entails.

SWR's benchmarking process was designed precisely to address this gap: to provide a meaningful 'read across' between standards. This not only enhances transparency but also helps the industry mitigate the risk of greenwash.

A second ambition for the benchmarking process is to support shared learning and improved practice in wine sustainably. Whilst our assessments do contain numerical scores, they also include narrative evaluations of each standard. Firstly, this enables us to provide nuance about how a standard operates, and what it seeks to achieve. Secondly, it also allows us to draw out lessons on how the complex task of implementing sustainability in wine can be approached more effectively.

Our benchmarking tools

The Global Reference Framework

To facilitate this process, we needed to develop a point of reference against which to benchmark the 40+ standards. Even if the specifics differ from location to location, it was essential to define the range of core topics and issues that collectively constitute sustainability in wine.

This led to the development of the Global Reference Framework (GRF)—the first global analysis of what sustainability in wine entails. This was developed in three stages over 18 months:

1. Initial Review

We undertook an initial review of 25 of the existing sustainability standards. This revealed that the benchmarking process was rather more complicated than just comparing which issues each did or did not include. Standards differ, not just in the aspects of sustainability they cover, but in how they seek to develop over time – what might be called their 'philosophy'. It also became apparent from this process that inclusivity and collaboration were also important factors to a standard's reach and impact



2. Cross-Sector Learning

As a second phase of work we wanted to ensure that a reference framework drew, not just on the knowledge and expertise within the wine supply chain, but also on the experience from other similar sectors. Wine is relatively new to the sustainability game. Therefore, it made sense to draw on lessons from other agricultural sectors like oil palm, cocoa and consumer goods, and from other sustainability standards such as the Sustainable Agriculture Initiative and Amfori BSCI.

3. Framework Consolidation

In the second half of 2023, insights from both phases were drawn together into the GRF as a single, research-backed statement of what sustainability in wine currently encompasses. As our knowledge and understanding of sustainability evolves over time – in some cases driven by SWR's own work on issues such as wine packaging – the GRF will need to be revised periodically to reflect this.

The scoring matrix

To apply the GRF in practice, it was also necessary to create a scoring mechanism that applied across the full range of sustainability issues. In spring 2024, we worked with a consultative group of SWR members to develop a scoring matrix that would enable consistent, structured assessments using the GRF.

At the recommendation of the consultative group, we conducted an initial pilot study of 7 standards to test the scoring process. The results of that pilot were presented in December 2024 and are available in a publicly accessible report.

Operational practice

The benchmarking process has been undertaken by Dr Peter Stanbury and Delaney Sheridan. For each standard, the evaluation followed a consistent process:

- We received the latest version of the standard's documentation, along with any supporting materials and ancillary reference documents, from the standard holder.
- Both of us independently reviewed the documentation and used the scoring matrix to assess performance across the GRF's issue areas. We also recorded observations we considered particularly relevant or noteworthy.
- We then met to review and compare our respective scores and observations. In general, our assessments have been reasonably consonant, with no major differences of view in relation to the standards being reviewed.
- A summary analysis was prepared, highlighting areas where we needed more information, and those where we believed the standard does not meet with the requirements of the GRF.



- This summary was shared with the standard owner in a follow-up meeting. In some cases, additional documentation resolved outstanding questions. In others, standards have accepted that we have identified an area where they need to improve and undertaken to make changes over time. Naturally, There were also instances where our views diverged from those of the standard body.
- In most cases, the standards body has also provided a written response to our initial assessment document. These have also been extremely useful in helping us to form a more complete view of each standard.
- Finally, we compiled a final scoring and narrative document which was shared with the standards body. These final analyses and scores are presented in the members-only version of this report.

Governance

As the GRF makes clear, good governance and robust audit processes are crucial to the credibility of a standard. Similarly, in developing our tools and conducting the standards benchmark process, it behoved us to demonstrate good governance of the process, be transparent and show that our work had received sufficient oversight from other experts and from the SWR membership.

Robustness of the process

When SWR began its work in this area, an initial idea considered was the development of a single, global standard for sustainability in wine. This would have been created under the aegis of the ISEAL Alliance, a global body working on sustainability across a range of sectors and issues.

Even though we ultimately decided against the creation of a single standard, for reasons stated elsewhere, we believed it important to ensure that the approach we did take was informed by ISEAL's model. Accordingly, our work over the past two and a half years has been informed by ISEAL's [Sustainability Benchmarking Good Practice Checklist](#) which contains 30 recommended steps.

Moreover, the GRF itself was developed using robust research techniques and included key informant interviews and a review of relevant literature. Full references are included to demonstrate the sources of information used.

Transparency and oversight

The development of the GRF, the scoring matrix, and the benchmarking process has been led by the SWR operations team (who together bring over 85 years of experience in sustainability,) specifically Dr Peter Stanbury and Delaney Sheridan. At every stage of the process we have been transparent about our work and findings, and in ensuring that we built not just on our



knowledge and experience but also that of others.

Our work has been presented at key milestones to full meetings of SWR's membership. The results of the first stage of development of the GRF was presented in October 2022; the second phase in May 2023; and the final version of the GRF launched in November 2023. The scoring matrix was presented to members in April 2024. At each of these presentations, members were invited to provide feedback, which was incorporated into subsequent revisions

We also convened a technical advisory group of SWR members drawn from across different parts of the wine sector to review the final version of the GRF and the scoring matrix. This group included representatives from: Cloudy Bay; Equalitas; Robert Hall Winery; Systembolaget; Terra Vitis; Treasury Wine Estates; and The Wine Society. We would very much like to thank these people for their valuable time, and for the advice they provided.

The structure of each evaluation

The assessment of each standard contains two components:

1. Scoring

A quantitative assessment of the standard against the GRF's issue areas. The GRF is a statement of what sustainability in wine entails, and therefore the scores reflect the degree to which each standard is consonant with that definition.

2. Narrative Evaluation

A qualitative summary that both our initial assessment and subsequent dialogue with the standard owner. This narrative provides essential context to the otherwise quite stark numerical scores.

This dual approach reflects the two aims of the benchmarking processes. The first is to provide direct comparability between standards —i.e., as of today, does the certification label reliably indicate that the wine in the bottle has been produced sustainably?

The second is to support improvement over time. This means that in some cases, these raw scores need to be contextualised in order to offer a more rounded understanding of each standard. Our role is not to criticise, but rather to point out where a standard falls short in demonstrating sustainability and suggest means by which these issues might be rectified over time. As will become apparent from this report, this is supporting a process that most of the standards bodies are already engaged in.



Engagement with standards bodies

Engaging with each standards body is a central part of our approach. One change made after the pilot study was to ensure that each standard had sufficient time to respond to our feedback, and that the final assessment reflected a thorough and balanced exchange. Obviously, this process can occasionally require robust conversation. However, we would like to say that we continue to find all of our interactions with the standards bodies fascinating, and we hope they feel likewise.

The process of close interaction has been hugely valuable also in getting much better insights into the operation of each standards. In a number of cases, these insights have put a different complexion on criticisms which a superficial review of a standard might make.

The standards bodies seem, largely, to have welcomed external commentary and critique. One interviewee commented:

“ We spend most of our time looking inwards to our own standard and members. It’s great to get a perspective about what’s going on elsewhere.”

Another noted:

“ The standard has been developed over time, and it is perhaps not as focussed as it should be, but it takes someone from outside to spot that and tell us.”

We are also working with a number of standards to help address issues raised.





2

The standards
evaluated

In this round of evaluation, we reviewed eight standards drawn from all over the world. As with the pilot the aim has been to cover a wide range of geographies, and address first those standards with the widest spread.

EU Organic (global)

Established as a series of EU Regulations, this standard applies not just to wine, but also to other agricultural products. Moreover, it operates globally, not just on one location.

Wines of Alentejo Sustainability Programme (Portugal)

The Wines of Alentejo Sustainability Programme (WASP) was initiated in 2013 by the Alentejo Regional Wine Growing Commission.

Fair Choice (Germany)

FairChoice was developed by the non-profit German Institute for Sustainable Development (DINE e.V.) at Heilbronn University of Applied Sciences.

Terra Vitis (France)

Terra Vitis is a membership organisation encompassing some 2,000 producers across France. Created 25 years ago this organisation has developed a wine sustainability standard.

Napa Green (USA)

Established as a not-for-profit entity, and backed by some of the area's leading wine experts, this standard operates in the Napa Valley region of California.

Argentinian Wine Sustainability Self-Assessment Guide - COVIAR (Argentina)

COVIAR's Wine Sustainability Self-Assessment Guide is a relatively new standard, based in Argentina, and founded in 2020. Its partners include National Institute of Viticulture and the National Institute of Agricultural Technology.

Sustainability Code of the Chilean Wine Industry (Chile)

The Vinos de Chile Sustainability Standard sits under the aegis of Chile's wine trade body, The Chilean Wine Association.

Demeter (global)

Demeter is a leading biodynamic standard. Like EU Organic, Demeter is designed to operate across different commodities and geographies.





3

Findings from the benchmarking process

What to do about externally-sourced grapes?

An issue not explicitly addressed in the Global Reference Framework is how to account for grapes purchased from external growers. It is widespread practice for wine producers to buy in grapes to vinify when they do not themselves grow enough grapes for their needs. At the moment, the implications of this practice for the credibility of a certification label are not reflected in the GRF.

The core logic that we are using in our evaluation process is whether or not a certification label provides a credible indication that a wine is 'sustainable'. This means, for example, that we are assessing each standard on the level of performance required to achieve certification, not the highest level of practice it might promote.

The question therefore is what proportion of the grapes used in any bottle of wine have been produced in accordance with the standard whose label is on the bottle. In many cases, grape growers themselves will acquire certification, and many of the standards have categories which apply to companies which grow grapes but do not vinify them. In these cases grapes have demonstrably been grown in accordance with the requirements of the relevant standards body.

The challenge arises when a winemaker sources grapes from non-certified growers. Some standards bodies are explicit about the maximum proportion of grapes in a wine which can come from non-certified sources, and indeed some require all grapes used to be from certified growers. Others, however, provide less detail about the level of externally sourced grapes that can be used.

This is clearly an important issue and cuts to the heart of how credible a standard label is in demonstrating good sustainability performance. The GRF will be revised at the end of this benchmarking round, and we will ensure that a requirement is included, likely in the governance or audit section, about this issue.

The challenge of including smaller wineries

Once again, a key issue across our evaluations is the challenge of how best to include smaller companies in sustainability, and enable them to have a realistic opportunity to gain certification.

The challenges for smaller businesses are self-evident. Certification can be relatively expensive, including audit fees and, in some cases, additional fees to the standard's body. This alone may deter participation. Human resource constraints are another factor: smaller management teams may lack the time or expertise to engage fully with sustainability requirements. All of the



standards bodies we reviewed are looking for ways to address these challenges, with varying degrees of success. Some of the examples to have emerged include the following:

- **Fee management**

All standards bodies seek to reduce as far as possible the fees involved in the certification process, with a particular eye on reducing costs for smaller companies.

- **Tiered requirements**

One standards body in particular sets out a requirement for compliance with many fewer topics for smaller companies. The aim is that a smaller company will therefore have fewer things to address. Whilst this is in principle a sound idea, the end result is rather confusing as smaller companies having met fewer criteria are still permitted to use the same certification label as larger companies who have had to achieve more.

- **Setting a lower bar for certification**

Another organisation has chosen to set a generally lower bar for all companies, no matter what size, to become certified. The aim will then be to raise that bar over time. Again, this is in principle a sound idea and provides the prospect of gradual improvement over time. However, in the shorter term, the effect is that it may dilute the credibility of the standards label in the short term.

- **Clarity around the 'on ramp'**

Other bodies have addressed this issue by clearly outlining the trajectory of performance on various issues and how that can be achieved. This gives all companies, be they large or small, a clear task list and allows them to prioritise accordingly. Smaller companies may take longer to address all the tasks, but the challenge of deciding what to do and in what order is more manageable and simplified.

- **An umbrella approach**

Another standard has found a novel way of including ultra-small producers. In France there are a large number growers like this, for example a family which may maintain a small plots of vines as an historical overhang. Terra Vitis addresses this challenge by allowing these small plots to be included in the hectareage of the larger operation to which the grapes are then sold.



The sensitivities around labour issues

When we began this benchmarking process, we knew that labour issues were generally less well covered in many standards than environmental issues, and that there was a degree of sensitivity about these topics. In particular we were aware that for many standards the fact that these issues are covered in prevailing laws is sufficient, and that more detailed practice is therefore not required within a wine sustainability standard.

As we have moved through the benchmarking process, it has become clear just how sensitive these issues are. Several standards shared with us that they have faced significant push-back from their members and others on these topics. Examples include:

“ We have had people leaving the standard in protest that we wanted to include labour issues.”

“ Some people feel almost insulted that we should include these issues – it’s as if we are impugning their honour to suggest that they might be involved in labour challenges.”

What this means is that standards organisations are having to proceed slowly and carefully on inclusion of tighter requirements on labour issues within their standard. None have suggested that these issues do not need to be addressed: the question is how to do it most effectively. In some cases, the standards bodies are being frank about the situation, making it clear that, whether wine makers like it or not, scrutiny on these issues from retail markets is continuing to ramp up.

At the same time, our conversations have highlighted a broader lack of awareness around labour issues. One standard commented:

“ Many people simply cannot get their mind round the fact that this might even be an issue for the wine industry.”

This observation is supported by SWR’s broader work on labour standards. In our collaborations with DOCs and other groups, we’ve found that awareness of issues such as modern slavery and human trafficking remains low. For many in the sector, these are not topics they believe apply to their operations—let alone ones they feel equipped to address. This is why training initiatives like those led by the NGO Stronger Together in Italy and South Africa is so important. It builds awareness of these issues, how to spot challenges, and what to do about them.

Packaging and the onward supply chain

As with labour issues, when we began the benchmarking process, we knew that issues such as packaging and logistics were generally underrepresented in sustainability standards. This is perhaps unsurprising, given that many standards were developed by grower groups, with a primary focus on viticulture and viniculture. Issues ‘beyond the factory gate’ have often been considered outside the scope of sustainability certification.

Our evaluations to date have confirmed just how limited the coverage of these topics remain in most standards. The GRF currently looks only at three broad aspects of these topics: bottle weight; exploration of the use of other formats; and a basic requirement around logistics choices. Yet even with this relatively



low bar, standards generally do not score highly.

That said, there is growing recognition among standards bodies that these areas require improvement. Encouragingly, we are beginning to see new additions in some standards. For example, several we have evaluated to date have adopted the bottle weight target developed by the SWR's Bottle Weight Accord. We feel this demonstrates the value of a collaborative approach to the development of good practice in sustainability.

We have also observed that some standards now include detailed guidance and information on various aspects of packaging, which is a significant step forward. A number of those standards evaluated have committed to making some of that advice part of certification requirements over time, which is a welcome development.

However, real gaps still exist in our understanding of what sustainability includes. Within this set of issues, what constitutes 'sustainable wine logistics' still remains unclear. While broad principles are understood (e.g. avoiding air freight, favouring low-emission transport, and optimising bulk shipping), there is still a need to develop more detailed, context-sensitive guidance. What sustainable logistics looks like in practice—and how it varies across different regions and supply chains—remains an open question.

The importance of flexibility within a process

For a standard to be robust and therefore credible it needs to be very clear about what level of performance is needed on each issue. However, our benchmarking has also highlighted the importance of building flexibility into what remains a rigorous process. This returns us to the theme of do-ability: if a process is too rigid, it can become a barrier for companies seeking certification. A degree of pragmatism about needs to be insisted on, particularly in determining which issues must be addressed immediately, and which can be staged over time.

One example comes from the FairChoice standard that defines a set a clear set of 'knock-out' criteria: If these are not achieved, certification is not possible. For other issues, however, unmet criteria result in a formal non-conformity, with requirements to remedy the issue within a defined time-frame. Depending on the severity of the non-conformity, that time-frame was varied. However, in order to ensure that flexibility was not interpreted as laxity, if a non-conformity was not addressed in the allotted time, it would be raised to the next level of seriousness.

We greatly admire this approach as it ensures that critical issues do not slide, but still recognises that improving sustainability is a journey and it is



not possible to address everything all at once. Moreover, it appreciates that sustainability needs to be worked on alongside a range of other operational and commercial priorities.

We have also seen similar flexibility at the higher end of the performance spectrum. Much of this report has emphasised the importance of defining what progression looks like in implementing different aspects of sustainable practice. This provides companies with a clear roadmap and demonstrates uniformity of practice across all those certified to a standard.

However, what happens when a vineyard or winery has already achieved a high level of performance. Is it relevant to set ever more detailed requirements, especially where local circumstances may differ. Terra Vitis has found a novel way to address this. On several issues, once core requirements are met, the standard presents a menu of additional improvement options. Certifying companies can then choose the actions most relevant to their context, supporting the process of continuous improvement while respecting the diversity of operational realities.

The value of targeted standards

This is the first occasion when we have evaluated standards which are not specific both to wine and to a particular location. Both EU Organic and Demeter are intended to be applicable globally and to a range of agricultural supply chains. The logic for this is sound: it enables consistency across products and locations, allowing consumers to purchase a range of goods from different countries under a shared sustainability certification.

This ease of comparability is, of course, one of the core reasons for our benchmarking process. With over 40 wine sustainability standards in existence, the landscape is highly fragmented. Our work aims to clarify how these standards align or differ, and to bring greater transparency to the industry as a whole.

As noted earlier, an early ambition of SWR was to produce a single global wine sustainability standard. However, we ultimately rejected this idea because we felt that the regional specificity which national/ local standards provide is extremely valuable.

This has been borne out by the evaluation process to date. Standards may cover similar issues, but the nuancing of these to address local circumstances is highly impressive. Moreover, regional standards bodies typically provide significant support to companies by way of guidance, training, technical assistance, seminars and so on.

By contrast, broader cross-sectoral standards are not able to provide this level of insight. Certainly, while setting clear expectations on key issues, often lack



the contextual detail needed for practical implementation. There are a number of important ramifications from this.

Firstly, as we have often observed, a sustainability standard needs to function not only as a 'badge of achievement' but also as a 'how to' guide. The best standards we have reviewed, Wines of Alentejo for example, provide a clear trajectory of performance on all the issues it covers. This gives wine businesses, no matter where they are in the sustainability journey, a clear sense of next steps. These actions are wine-specific and locally relevant. Standards like EU Organic are not able to provide this level of approachable detail which, arguably, makes it harder for companies to grasp what they need to do in practice to move towards certification.

Secondly, it makes it harder for broader standards to address situations where, in some circumstances, their requirements might be self-contradictory. The obvious example of this is the EU Organic standard's focus both on the use of non-synthetic chemicals and soil health. We know, as an example, that the wet growing season in 2024 in northern Italy and southern France meant that organic producers needed to undertake repeated sprays to maintain the effectiveness of the chemical inputs. In most cases, these applications would be done by tractors whose greater use will lead to soil compaction thus undermining the very soil health the standard seeks to protect.

None of this is to say that broader standards, be that in geographic scope or their applicability to a range of crops, are not extremely valuable. However, the trade-offs that come with this breadth—particularly the loss of local nuance—must also be acknowledged.

The importance of standards as a management process

We have been struck again in this round of evaluations just how important standards are as a management process rather than just a 'badge' showing good practice. This issue has been frequently referred to already above, so not too much more needs to be said at this point. Nevertheless, it is important to remember that improving performance across all standards is vital. Our work is not just about assessing the credibility of standards now, but improving practice in the longer term.

However, the importance of this issue is really amplified when talking with growers who are seeking to certify to a standard. They need a clear plan of action which can be understood within their wider operational and commercial management structures. Sustainability can seem complicated, and certainly encompasses a wide range of issues. The extent to which a standard is able to support this, rather than appear as yet another thing on the 'to do' list is vital to their impact.



As well as providing a clear 'to do' list, the best standards also provide significant resources to wine businesses to support them. This might be on-line resources, workshops and other information. Napa Green, for example, provide direct support to companies wanting to become certified demonstrates, and run a series of workshops and other face-to-face forums so that companies can learn from each other. The consortium of organisations behind the Vinos de Chile standard includes research institutions whose outputs support certifying wine businesses.





Beyond benchmarking

One of the most striking outcomes of the benchmarking process thus far has been the sheer diversity of approaches taken by sustainability standards in the wine sector. Each reflects its own context—shaped by geography, regulatory environment, market pressures, and organisational philosophy. This diversity is not a weakness; it is a strength. It shows that whilst the broad themes of sustainability are global, these manifest in a huge variety of local realities, which require evolving practices shaped by local realities to address effectively.

At the same time, certain structures and strategies have emerged as particularly effective—whether in how standards support smaller producers, address labour issues, or embed flexibility without compromising rigour. These examples offer valuable lessons not just for individual standards, but for the sector as a whole.

Taken together, these point to a deeper understanding of what makes a sustainability standard effective. Not just credible, but usable. When we complete the full benchmarking process in early 2026, SWR will publish a follow-up report highlighting these standout practices: a “greatest hits” of sustainability in wine. This will not be a ranking, but a resource: a curated set of insights to inform and support continuous improvement across the industry.

SWR’s role in this is not just to assess, but to convene, challenge, and support. The insights from this benchmarking round will inform the next iteration of the Global Reference Framework, and we will continue working with standards bodies, producers, and partners to ensure that sustainability in wine is not only credible, but also achievable, inclusive, and continually improving.