



Wine Packaging Choice Tool

Developing an evidence-backed tool to drive informed packaging decisions for wine.

The Challenge

Glass bottles remain the dominant wine packaging format, accounting for over 80% of global volumes. Yet bottle manufacture and transport can account for up to 50% of a wine's total carbon footprint. At the same time, Scope 3 emission reporting requirements and the introduction of Extended Producer Responsibility (EPR) levies in many markets are sharpening commercial and regulatory pressure to reduce packaging impacts.

While lower-carbon formats like aluminium cans, PET, bag-in-box, and kegs offer real opportunities, "lower carbon" does not necessarily equal "more sustainable". Different formats can shift impacts elsewhere, with outcomes shaped by local recycling infrastructure and other market-specific factors including availability, operational practicality, and consumer acceptance.

The Aim

To develop a Packaging Choice Tool that helps wine businesses take informed decisions about their packaging formats, balancing environmental outcomes with practical and commercial realities. The tool will consider:

- **Environmental trade-offs**, including carbon emissions, recyclability, and pollution risk.
- **End-of-life outcomes**, based on market-specific recycling rates and infrastructure realities.
- **Logistics and shipping choices**, including bulk shipping and destination bottling considerations.
- **Commercial practicality**, including how filling-line speed and equipment requirements affect unit costs.
- **Consumer perceptions**, and the realistic scope to shift these over time.
- **Availability and scalability**, now and over the medium term, including when alternative formats may reach critical mass.

Key questions

- **Where are you selling to?** Recycling rates vary greatly by country, and affect outcomes.
- **Where is the wine coming from?** Transport weight and route matter; bulk shipping may be preferable in some cases.
- **How and where will it be consumed?** Formats suit different occasions, for example single-serve cans for on-the-go.
- **On-trade vs off-trade?** On-trade service may suit kegs for wine by the glass or carafe.
- **What shelf life is required?** Most wine is drunk within two weeks of purchase, so glass may be unnecessary.

Workplan for 2026

This first phase lays the foundation for the Packaging Choice Tool by translating existing evidence and market insight into a practical decision framework that can be tested and refined.

Literature review

The wine sector is not the first to face the challenge of better managing the environmental impacts of its packaging. The research will begin by reviewing work already in place. This will focus on three primary areas:

- Other sectors, from consumer goods to food have already done considerable work in this area. We will review the findings and recommendations made by policy-makers in other sectors.
- There are also a range of academic and policy studies on different aspects of packaging. The most significant of these will be reviewed.
- There is also relevant work within the wine sector. In Autumn 2024, Porto Protocol released work on wine packaging. Whilst not structured as a tool, it nonetheless contains much relevant information.

Stakeholder interviews

- **Retailers:** At present, much of the innovation in wine packaging is driven by the requirements of end-market retailers. This will become even more the case as EPR regulations take hold. We will interview a number of SWR retailer members from different sales markets to understand their perspectives and views on how their requirements on packaging will evolve over the next few years.
- **Packaging manufacturers:** Interviews with bottle makers were valuable in developing SWR's research on bottle weight, particularly in understanding relevant technical aspects.
- **Other relevant organisations:** Initial interviews and review of key literature will identify other individuals and organisations which would be valuable to interview. This might include, for example, other industry bodies which have addressed packaging issues.

Foundational report

We will translate research and interview findings into an initial report containing the following analysis:

- **Key environmental impacts of wine packaging** beyond just carbon (including pollution and landfill risk).
- **Impacts by packaging type**, covering the profiles of main formats, emerging innovations and closures.
- **Recycling rates by market**, reviewing end-of-life outcomes in key destination markets by material.
- **Logistics considerations**, including bulk shipping, destination bottling, and route impacts.
- **Key decision-making factors** that determine the most appropriate option by context, structured as a logical decision tree.
- **Proposed tool structure**, summarising implications for what the tool needs to do, what it might look like, and how it can be developed in future phases.

Actions & milestones

March 2026: Conduct literature review and stakeholder interviews.

May 2026: Release foundational report and draft framework. Present findings to SWR members (webinar and/or member session).

June 2026: Test the framework with participating members and identify gaps and areas for further development (what works, where, and why).

August 2026: Define the next phase based on member feedback, which may include deeper analysis on priority factors, expanded coverage of destination markets, and additional considerations not captured in the initial phase.

September 2026: Explore options for tool development (e.g. decision tree as a static framework vs an interactive choice tool), and agree workplan for the remainder of 2026 and beyond.

Contact us

If you have any questions, would like further details or are interested in getting involved, please contact Luke Mobley, Commercial Partnerships Manager, luke@swroundtable.org.