

NEW ZEALAND WINEGROWERS INC

# ANNUAL REPORT 2019



NEW ZEALAND WINE  
PURE DISCOVERY

## **Vision**

Around the world,  
New Zealand is renowned  
for our exceptional wines.

## **Mission**

To create enduring value  
for our members.

## **Purpose**

To protect and enhance  
the reputation of New  
Zealand wine.

To support the sustainable  
diversified value growth of  
New Zealand wine.

## **Activities**

Advocacy, Research,  
Marketing, Environment

**New Zealand Winegrowers Inc**  
Annual Report 2019

<b>01</b>	Chair's Report	02
<b>02</b>	Advocacy	10
<b>03</b>	Research	16
<b>04</b>	Sustainability	24
<b>05</b>	Marketing and Events	28
<b>06</b>	Information Resources	42
<b>07</b>	Financials	44
<b>08</b>	Statistics	46
<b>09</b>	Directory	54





# 01 CHAIR'S REPORT

**This year the Board completed its strategic review of the wine industry — its first since 2011. We engaged Pricewaterhouse Coopers to help us dig deep into a wide range of questions. The process, and their report, provided us and all members with a wealth of usable insights into the state of our sector, challenges and opportunities.**

## **Evolving for the Future**

The strategic review report concludes that our focus as an industry needs to be on enhancing the industry's reputation and sustainability credentials, responding to changing market dynamics, and managing and mitigating risks to profitability, all underpinned by maintaining quality, distinctive wine styles.

So what have we done as a result of the review?

First, it's your review, so we shared it with you. We visited all the main wine regions in October to present the report and its findings to members, and again last month we toured the regions to explain decisions taken so far, and how it will be implemented.

One of our key goals for this strategic review was to produce a study of the industry and its future that is usable for you today. If you have not read the report, I strongly recommend that you do. It's all in digestible bites at [nzwine.com/members](http://nzwine.com/members) under Reports & Statistics, with separate chapters on Sustainability, Supply, Demand, Regions, Research, Celebrating



Excellence, Technology, Regulation, Business Models, and Supply Risks.

Next, we confirmed New Zealand Winegrowers' existing vision – that around the world New Zealand is renowned for its exceptional wines – but updated our purpose statement to better reflect why we exist: to protect and enhance the reputation of New Zealand wine; and to support the sustainable and diversified value growth of New Zealand wine.

The Board then took some initial steps:

- We responded to members' feedback about how to celebrate our industry's successes by developing a new New Zealand Wine of the Year Awards to recognise a broader range of achievements within our sector; and
- We sharpened our focus on communicating directly to members usable developments and trends through the Bragato Conference, Grape Days, Spray Days, and other channels.

Since then, the Board and management have worked hard to prioritise and plan effective implementation of the review's outcomes.

The strategic review report noted the continued steady growth of the industry, and identified a range of challenges and risks that need to be addressed to maintain that trajectory, and ensure all members have the opportunity to benefit. This year's export results again reflect the industry's strengths, with total export value for the year ended June 2019 up 6% on the previous year to \$1.83 billion and volume up 5% to 270 million litres. The average price per litre was up 1% on the previous year to \$6.74 per litre, with packaged wine up 2% at \$8.55. The UK and USA led the growth, with value growth outpacing volume growth in both markets.

Another key industry dynamic examined was land availability in Marlborough, our largest winegrowing region. The report concludes that there is approximately 5,000 hectares of commercially viable, productive land remaining in Marlborough, and PwC's modelling suggests the region may near supply capacity limits by around 2028. This implies that Marlborough wineries will increasingly need to focus on value enhancement and productivity, while maintaining quality. New Zealand Winegrowers' research efforts will support this drive.

Over the whole country, New Zealand's producing vineyard area grew this year by 600 hectares or 2% – to 38,680 hectares, with each of Hawke's Bay and Marlborough recording growth of over 2%. Sauvignon Blanc, Chardonnay, Pinot Noir and Pinot Gris recorded the largest vineyard area growth. Based on plantings yet to come into production, we estimate total growth in productive vineyard area to continue at around 1% for at least the next two years.





### Implementing the Strategic Review outcomes

The risk with any organisational review is that the findings simply sit on the shelf. Your Board is determined that the investment in the strategic review will deliver measurable results for the benefit of members. We formed an implementation committee of the Board to guide and monitor the implementation of decisions taken by the Board, and to report on progress to the Board and members.

We developed a five year budget forecast for New Zealand Winegrowers, and approved a new budget for the 2019/2020 year that will begin to give life to the changes. We acknowledge that the 10% levy increase this year will cause pain for some, but as a levy payer myself, I can assure you that the Board has scrutinised carefully all existing and proposed expenditure, and will continue to do so. We consider the increase is necessary if New Zealand Winegrowers is to deliver at least the same level of service to members as it has in the recent past, while also delivering the strategic review outcomes.

As a result of the strategic review we are:

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Developing and publishing KPIs for New Zealand Winegrowers, and health indicators for the industry as a whole

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Ensuring diversity is showcased across all our activities

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Revamping the New Zealand Winegrowers management structure to better reflect the importance of sustainability

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Offering greater, and clearer, support to regions

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Expanding the focus on domestic wine tourism, while stopping most levy-funded activity in Australia

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Refocussing activities in Advocacy, Environment and Research and

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Continuing to offer timely and relevant information.

The Board will continue to report to members on initiatives and changes that New Zealand Winegrowers is undertaking as a result of the strategic review.



### **Strength through our regions**

One of the industry's strengths is the diversity of its regions, and the mix of varieties, styles and stories they contribute to our overall New Zealand wine offering. This finding came through strongly in the strategic review. But we also heard that regions would appreciate more engagement with the national body, and more support for regional administration, and more clarity over our respective roles.

We discussed this with regional Chairs at a recent Regional Membership Council meeting, and have agreed a number of steps to make this a reality. New Zealand Winegrowers' new General Manager Sustainability role will be given specific responsibility for oversight of the relationship between NZW and each regional body, and we will make sure we attend more regional association meetings. New six year relationship agreements with each region will match the six year mandate of New Zealand Winegrowers from its members under our levy orders. And in addition to providing for regional funding, those

agreements will make clearer the kinds of support and efficiencies that we can provide to regional associations — including governance training, accounting support, website and IT support, membership database access and training, and one free place at key NZW events.

More emphasis on our regions was also part of the new format for the New Zealand Wine Awards, first held in November. As our single annual industry celebration, the event now provides more opportunities to celebrate the uniqueness of each region and its wines, the achievements of our emerging leaders from the Young Viticulturist of the Year, Young Winemaker of the Year, and the New Zealand School of Winegrowing, and to recognise other achievements. This year we were pleased to honour three new Fellows, recognising the outstanding contributions to New Zealand winegrowing made by Jane Hunter, Mark Nobilo and Ivan Sutherland. This year's Wine Awards promises to be an even broader recognition of our collective achievements.



## Bragato Research Institute (BRI)

This has been an exciting year of consolidation and progress for New Zealand Winegrowers' wholly-owned national grape and wine research centre — the Bragato Research Institute.

As recommended in the strategic review, we expanded the independent depth on the BRI Board by appointing two of New Zealand's most experienced research leaders, Dr Bruce Campbell and Dr Dianne McCarthy CNZM. BRI also secured key staff, with Jacqui Wood joining as Research Winery Manager, Dr Darrell Lizamore appointed as Principal Research Scientist Grapevine Improvement, and Dr Fang Gou as Data Coordinator.

BRI made and reported on developments in each of its three largest research programmes — Vineyard Ecosystems, Lighter Wines and Pinot Noir. With 23 separate research projects on the go, BRI is focussed on completing and delivering insights to our members through a wide range of publications, reports and events — such as Grape Days, which 700 members attended this year.

This year BRI also successfully completed its first vintage using its newly-designed research fermenters. Next year will see BRI build a new research winery facility alongside key industry and research partners at the NMIT/MRC campus in Blenheim, which will have capacity for 100 of these research fermenters, allowing wine research of a kind and scale never possible before in New Zealand.

## Climate change

Potential impacts of climate change are some of the most significant unknowns facing our industry, which is why BRI has a major climate change programme under way. The first phase — completed this year — modelled climate scenarios for nine winegrowing regions and presented those findings to members. The next two phases will explore the impact of different climate scenarios on our regions, and evaluate adaptation strategies to respond to those impacts.

The government's Zero Carbon Bill (or, more properly, the Climate Change Response (Zero Carbon) Amendment Bill), introduced this year, is proposed as New Zealand's national framework to deliver on its obligations under the 2016 Paris Agreement on climate change. The Bill would put in place a structure of targets and independently-set rolling emissions budgets to meet those targets. The Bill aims to balance the need for individuals and businesses to have certainty about how New Zealand's national response to climate change will affect them, against the need to allow the government of the day to weigh up competing policy priorities — such as what our economy and other countries are doing.

The Bill's approach is similar to that taken by the UK, and seems sound, but the real test will be how this framework is implemented over coming years.

Winegrowing is a very low net emitter of greenhouse gasses. In fact it is precisely the kind of low-carbon, high value land use the Productivity Commission said New Zealand would need to expand if it is to achieve a sustainable low emissions future. Assuming the Bill becomes law, we will be watching carefully to ensure it is implemented in a way that recognises winegrowing's sustainability advantages, and meets the needs of our members.

## Sustainability

Sustainability is a cornerstone of the reputation of New Zealand wine, and the strategic review underscored how important all aspects of sustainability are to maintaining our social license to operate and our markets. In response, the Board has created a new General Manager Sustainability role to increase the focus on embedding sustainability — environmental, social, economic and cultural — through everything New Zealand Winegrowers does.

Informed by the strategic review and detailed member feedback, our renewed commitment to sustainability will see us prioritising work in the areas of water, waste, pests and disease, climate change and people. A new technical advisory group will prioritise Sustainable Winegrowing New Zealand goals, and update and streamline the scorecard. Improving technology for members will also be considered across the whole organisation.





CHARDONNAY AND SPARKLING SYMPOSIUM 2019

## Biosecurity

A further two separate Brown Marmorated Stink Bugs (BMSB) — our number one “most unwanted” pest — were detected in New Zealand this year, testing our joint industry/government response arrangements under the Government Industry Agreement on Biosecurity. Thankfully in both instances no further bugs were found, and we were pleased with the way the BMSB Council — which we chair — was able to work with government on the response to achieve this good result.

The Ministry for Primary Industries also took high profile decisions to redirect car carrying vessels that were heavily contaminated with BMSB, and later proposed tough new regulations to manage imports from high BMSB risk countries. This shows that our close engagement with the government on biosecurity readiness and response is building trust and understanding.

We also doubled our Biosecurity staff, to two, so that we can help increase members’ awareness of biosecurity risks and their engagement in biosecurity risk management activities.

## Marketing

The marketing highlight of the year was the 2019 International Sauvignon Blanc Celebration, held in Marlborough. Sauvignon 2019 was built on three themes — Place, Purity and Pursuit — and guests were taken on a three-day journey exploring the complexity of Sauvignon Blanc, emerging styles, vineyard practices, winemaking influences and future trends. Our 350 guests, including 100 international delegates, were also treated to tastings and spectacular culinary evenings where 500 wines from 60 producers, representing six New Zealand winegrowing regions, were showcased.

The success of Sauvignon 2019 was also evident on social media, as the top lifestyle visitors promoted New Zealand wine and their distinctive experiences around New Zealand’s wine regions to a combined audience of 229,343 on Twitter and 59,453 on Instagram. Our refreshed social media goal over the past year was to increase engagement with members, and grow a community of highly engaged New Zealand wine lovers. Within the industry, we demonstrated leadership on social media by equipping members with the tools to leverage social media campaigns and dates. Initiatives such as the #SauvBlanc Day campaign, #CellarDoorDay promotion and 2019 Vintage competition contributed to a 57% increase in engagement on NZW social channels over the past year.

As part of the strategic review a number of new activities were proposed for New Zealand Winegrowers, including additional support and closer work with the regions, an increased cross-organisation focus on sustainability and increased support for wine tourism. Existing activities were reviewed and trimmed in a number of areas including closing the Australian office following five years of no growth for New Zealand wine sales.

Research tells us that international wine tourists spend more, stay longer and visit more regions than the average international visitor to New Zealand. This is great news for our wineries, particular those that rely more heavily on domestic sales. Our [nzwine.com/visit](http://nzwine.com/visit) portal now links tourists to 256 wineries offering 436 different wine tourism experiences. To support this increasing sophistication of winery tourism, we have submitted a proposal to government for technical amendments to the licensing provisions for winery cellar doors.

## Maintaining standards

2018 was, unfortunately, notable for a number of negative news stories about our industry. Principals at one large, and one small winery separately pleaded guilty to charges under the Wine Act, and the reputation of the industry in general was tarnished by headlines about some environmental breaches, and about labour contractors providing services to our sector but not meeting minimum labour standards.

Although these cases are the exceptions, and few of them are as straightforward as they seem from the headlines, they inevitably reflect poorly on us all. The Wine Act cases, in particular, were a clear wake-up call to winemakers: failure to comply with our rules is not just bad practice; it can have serious personal and business consequences.

We have subsequently fielded a lot more queries from members about compliance, and our Advocacy team has added an extra senior staff member. We are rolling out a roadshow around our regions in September to help highlight to members key areas for focus. An industry code of practice for workers is also under development to help ensure our labour standards universally meet legal requirements and international supply chain expectations.

Ultimately, addressing any collective shortcomings will make us stronger, and help reinforce our reputation for sustainably and ethically produced wine. Now is the time for us all to make sure we are clear about our legal obligations, and each play our part in ensuring all industry players are meeting them.

## Accessing our markets

After a long gestation, the CPTPP Agreement finally came into force at the end of 2018 and it is in force for seven of the 11 signatories — including Japan, Canada and Mexico, with whom it is our first free trade agreement. The agreement reduces tariffs on wine and includes wine-specific provisions to align labelling and other requirements.

Although the future of Brexit remains as uncertain as ever, negotiations have now begun on a free trade agreement with the European Union. The continental members of the EU, taken together, would be our third largest market, at around \$182 million. A free trade agreement that removed tariffs, protected our geographical indications, and removed friction in our trade with the EU — such as minor differences in winemaking practices and definitions, and the need for certificates of chemical analysis — would be worth having. Given the different approaches to agriculture between our markets, wine is unlikely to be the most significant sticking point in whether we can actually conclude a deal with the EU.

We were disappointed not to succeed in our campaign to have Dr John Barker elected as the first ever non-European Director General in the 100-year history of the International Organisation of Vine and Wine (OIV) in Paris. Dr Barker retained solid support right to the end from almost half the members, who were very keen to see a fresh approach within the body. We were very grateful for the direct support given by the Prime Minister, Deputy Prime Minister and Minister for Primary Industries, and for the huge efforts put in by Dr Barker and by staff of the Ministry of Foreign Affairs and Trade, and the Ministry for Primary Industries, both in New

Zealand and overseas. Together we delivered a strong campaign which reflected very well indeed on New Zealand and our wine industry.

## Board changes

During the past financial year Tim Nowell-Usticke and John Ballingall joined the board. We are very grateful that Katherine Jacobs, the inaugural Chair of the Women in Wine initiative, whilst leaving the board, has agreed to continue in the Women in Wine role. We thank her for her two years of engaged and active service as a director.

## Celebrating 200 years

On 25 September 1819, the Rev. Samuel Marsden set about creating a new mission settlement in the Kerikeri Basin, and at the Stone Store he planted about one hundred grape vines — the first ever recorded as being planted in New Zealand.

He wrote optimistically in his diary about our industry's future potential:

*New Zealand promises to be very favourable to the vine, as far as I can judge at present of the nature of the soil and climate. Should the vine succeed, it will prove of vast importance in this part of the globe.*

I doubt he knew just how right he was!

New Zealand Winegrowers will celebrate the 200th anniversary of this first planting with a celebration and tasting at the Kerikeri Mission Station, and dinner at the Waitangi Treaty Grounds. A commemorative vine will be planted to celebrate what has been achieved, and to mark the start of our industry's next 200 years.

I invite you all to raise a glass on 25 September, to reflect on where we've come from and toast our industry's bright future.



John Clarke, Chair



Clive Jones, Deputy Chair

NEW ZEALAND PROMISES TO BE  
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AS FAR AS I CAN JUDGE AT  
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Samuel Marsden  
1819





# 02

# ADVOCACY

**It's hard to keep ahead of changing rules and laws affecting winemaking, grape growing, and business. That's where the New Zealand Winegrowers Advocacy team comes in. One of our main roles is to keep abreast of those rules, alert members to significant changes, provide resources and one-on-one help to educate and guide members in their compliance.**

## **Help at hand**

Compliance breaches have, unfortunately, been in the news this past year. Based on the most common queries that we receive from members every week, we'll be revamping our resources and rolling out a roadshow over coming months to help ensure all members can be confident they understand their obligations.

## **Engaging to deliver**

In the Coalition Government's 'year of delivery', a key purpose of our Advocacy team is to effectively deliver clear messages and information to decision makers and influencers. We protect the status we have earned with successive governments as a trusted representative body by maintaining a frank dialogue about the industry's activities and interests. This ensures they hear the needs of our industry and can factor those into potential legislative and policy changes.

Important topics we have engaged government on this year include wine regulation and enforcement, immigration and labour, market access, allergens, wine tourism, worker safety, organics, climate change, health, pesticides, and alcohol licensing.

You can read our formal submissions to government — on topics such the Taxation Working Group, the "Trade for All" strategy, the EU-NZ free trade agreement negotiations, the Mental Health and Addiction Inquiry, and changes to the R&D tax credit scheme — on the members' section of [nzwine.com](http://nzwine.com).

## **Improving market access for New Zealand wine**

Our Advocacy team also works closely with the New Zealand government to open new markets, and reduce barriers to trade.

During this year negotiation of a free trade agreement with the European Union began. Our aspirations are high: we would like to see mutual acceptance of winemaking practices between the EU and New Zealand, so that any New Zealand wine saleable here can be sold in the EU, and vice versa. Whether that can be achieved will depend on how progressive the Europeans are prepared to be, and whether the overall negotiations can reconcile fundamental differences on agricultural issues.

On 30 December 2018 the CPTPP — the Comprehensive and Progressive Agreement for Trans-Pacific Partnership — became New





CHARDONNAY AND SPARKLING SYMPOSIUM 2019

with Japan, Canada, Mexico and Peru. It also expanded existing free trade agreements with Malaysia and Vietnam. The CPTPP will result in tariff elimination for wine exports to most CPTPP markets. Once fully implemented, we expect the tariff reductions will be an estimated \$4.5 million annually.

New Zealand joined a World Trade Organisation dispute protesting the preferential treatment Canada's gives its domestic wine over imported wine — particularly the way Canadian wine gets better access to grocery store shelves, and pays lower excise tax. Challenging Canada on these barriers sends an important signal that all economies must play by the WTO rules on fair trade. Success would remove unjustified extra costs from New Zealand exports to Canada.

Following an intense and lengthy campaign with many rounds of voting, the 47 members of the International Organisation of Vine and Wine (OIV) remained very firmly divided on who to elect as their new leader. New Zealand ultimately decided

to withdraw its candidate, Dr John Barker (New Zealand Winegrowers' former General Counsel), and in doing so avoided extending the election campaign for another year. We continue to work constructively with the OIV, but we and many other countries were deeply disappointed not to have the chance for Dr Barker to bring his clearly articulated vision of revitalisation and modernisation to this important but stodgy wine body.

### **Geographical indications to protect our regions**

All but one of our 18 regional applications to register New Zealand geographical indications (GIs) for wine have now been accepted by the Intellectual Property Office of New Zealand. This recognises years of investment by the winegrowers of New Zealand in developing those regions. It means those regional names can more readily be protected within international geographical indications regimes, such as those in the European Union and China. Winegrowers in several subregions are now also considering applying to register their subregional names under the GI Act.

### **Our people**

We want the wine industry to be an industry of choice for New Zealanders. That's why we have developed a Workforce Action Plan - a roadmap for steadily raising the profile of winegrowing as a career choice, and building capability and leadership skills.

As part of this, with a mission to "connect, inform and change", our Women in Wine initiative aims to:

- Help individual women reach their full potential and step-up into leadership roles as they wish; and
- Encourage businesses to assess their diversity and inclusion culture, ensuring there are equal opportunities for everyone

This year's inaugural Women in Wine pilot mentoring programme saw eight ambitious women matched with experienced and inspiring industry leaders to set and achieve personal development goals, develop their confidence, and widen their networks. The feedback from both mentees and mentors was that the programme was extremely beneficial and enjoyable. In 2019 the mentoring programme has been expanded to 11 places, and will be open to men as well.





YOUNG VITICULTURIST COMPETITION 2019

Similarly, our Young Viticulturist of the Year, and Young Winemaker of the Year competitions provide opportunities for our industry's talented future leaders to develop and test themselves on their technical and business skills. Annabel Bulk from Felton Road Wines in Bannockburn, Central Otago — 2018's Young Viticulturist of the Year — continued her success by gaining the coveted title of 2018 New Zealand Young Horticulturist of the Year. The Young Winemaker of the Year competition now has three regional competitions, and we hope to grow this in size, regions, participation and sponsorships over coming years.

### Embracing diversity

Last year's PwC Strategic Review highlighted diversity — of varieties, styles, regions, markets, business models, and people— as key factors in the resilience of the New Zealand wine industry. Inspired by this, and by the examples set by some of our members, New Zealand Winegrowers has committed to embracing diversity and inclusiveness in the workforce, both within its own organisation and throughout the wider industry.

To establish a baseline understanding of our workforce, the opportunities and challenges that exist for them, and their intentions, earlier this year

we conducted a survey of “Our People”. Over 700 responses were received; the results will be released at the Bragato Conference this year. One of the headline findings is that around 80% of respondents say they plan to stay in the industry “for the foreseeable future”.

New Zealand Winegrowers is working with Diversity Works NZ to develop its own diversity and inclusion policy, and has hosted initial seminars for members to learn more about workforce diversity and inclusion, and its benefits. As we learn on this journey, we will share our materials with members.

In March, following the attacks in Christchurch, the Board created a \$30,000 Communities Fund to support regional initiatives that foster personal contact and enhance understanding between:

- Those who live in the communities where the wine sector operates, and;
- Those who work in the wine sector — especially those whose background or culture differs from the majority of the community.

Applications from regions for ideas for the use of this fund are coming in now.

**80% of respondents say they plan to stay in the industry “for the foreseeable future”.**

2019 NZW ‘Our People’ Survey

## Supporting our workers

The 2018 Recognised Seasonal Employer (RSE) scheme cap increase (to 12,850 workers) was welcome and a direct result of the industry demonstrating its commitment to supporting migrant workers, and providing hard data to government about the gap in worker supply.

We contributed to an operational review on the RSE scheme. As a direct result of insights and information provided to government, the 2018 cap allocation process was an improvement on past years. The government is now conducting a policy review of the RSE scheme and our CEO and Chair have provided initial insights to the research team.

As noted in the Chair's report, mistreatment of workers is increasingly in the headlines. While the vast majority of members do keep standards high, the industry's reputation depends on all workers in the sector being protected. This means it is up to each member to be satisfied that workers on their vineyards or in their wineries are fairly treated and receive at least the minimum legal entitlements.

We meet regularly with the Ministry of Business, Innovation and Employment to share information and make sure we are each clear about our respective goals and priorities on labour and immigration issues.

## Tourism growth at winery cellar doors

Wine tourism is core business for many New Zealand wineries, and wine tourism has become significant within New Zealand's overall international tourism offering. These activities include cellar doors visits, restaurants, winery and vineyard tours, and accommodation. To support the growing importance of wine tourism, New Zealand Winegrowers has proposed to the government technical changes to the licensing regime for cellar door licences. These changes would recognise the commercial evolution of cellar door operations and cellar door tourism, and help ensure that licencing structures do not dictate business structures.

## Making responsible drinking the norm in New Zealand

In-depth research conducted by The Tomorrow Project — the joint responsible drinking initiative of New Zealand Winegrowers, Brewers Association and Spirits New Zealand — highlighted that if we want drinking responsibly to be the cultural norm in New Zealand, we need to make sure youth are provided with the support and understanding to make good decisions around drinking.

During this year nearly 20,000 year 9 school students (12-13 year olds) attended a performance and workshop of Smashed (smashed.org.nz). Smashed is a new, internationally acclaimed theatre-based education programme, aimed at equipping

year 9 students with the skills they need to counter peer pressure to drink alcohol. It has been brought to New Zealand by the Tomorrow Project, and is being delivered by the Life Education Trust. Feedback from school principals and school boards has been overwhelmingly positive. We plan to roll this pilot programme out more broadly in coming years.

## Maintaining sustainable relationships between growers and wineries

When tough decisions need to be made between growers and wineries. To help provide guidance for maintaining the grower/winery relationship we convened a working group to develop a Grape Supply Code of Conduct.

The voluntary Code, which will be released at the Bragato Conference this year, is intended to help codify industry expectations, and support sustainable, principled grape supply contracting. Beyond setting out basic minimum requirements, the Code does not prescribe what must be included in every contract; rather it identifies principles for a sound relationship, and recommends 12 core elements that should be agreed within in a grape supply contract to best support a good outcome, and ensure any differences are resolved efficiently.

## Submissions

New Zealand Winegrowers made or contributed to direct submissions to government or written policy proposals on many matters, including the following:

### International

#### Trade for All, MFAT

October 2018

#### Post-Brexit UK/NZ FTA, MFAT

February 2019 (ongoing)

#### Geographical indications in the EU/NZ FTA, MFAT

March 2019 (ongoing)

#### Graphic Health Warning Labelling on Alcoholic Beverages in Korea, MFAT

May 2019

#### Ongoing support for Canada WTO wine dispute, MFAT

### Domestic

#### Proposal for the International Visitor Tourism Levy, MBIE

July 2018

#### Food Safety Template for Winemakers, MPI

July 2018

#### Labelling of sugars on packaged foods and drinks, Food Regulation Standing Committee

September 2018

#### Potassium polyaspartate as a food additive in wine, FSANZ

October 2018

#### Corrective Taxes, Taxation Working Group Secretariat

November 2018

#### Government Tourism Strategy, MBIE

February 2019

#### Employer Assisted Work Visas and Regional Workforce Planning, MBIE

March 2019

#### Review of Vocational Education and Training, Ministry of Education

April 2019

#### Reform of the Overseas Investment Act

The Treasury, May 2019

#### Proposed Air NZ exemption from wine export requirements, MPI

June 2019

#### Consultation on mandatory pregnancy labelling (and other labelling initiatives), FSANZ

Ongoing



# 03 RESEARCH

## Key research priorities:

Quality and Productivity

Sustainability

Climate Change

Pest and Disease and  
Biosecurity

Technology Transfer

Diversification

New Zealand Winegrowers' research programme is comprised of more than 26 active projects and programmes, addressing all priority areas. Research reports and articles are produced regularly and communicated via the members' section of [nzwine.com](http://nzwine.com), email newsletters, and presentations given at annual conferences, regional seminars and workshops.

## THE INDUSTRY'S 3 MAJOR LEVY-FUNDED PROGRAMMES:

### Vineyard Ecosystems Programme: Pest and Disease, Sustainability

**Objective:** To research and understand how management choices affect New Zealand vineyards, to increase sustainable winegrowing in the future. The programme started in 2015 and runs to December 2021.

**Total Funding:** \$7m comprising \$3.5m each from NZW levies and MBIE Partnership Fund.

**Research:** The fourth year of data collection is complete and significant work is underway to convert this data into tools and information. The part of the programme looking at cost-efficient optimisation of weed management has ended, with outcomes showing no negative effect on yield and quality with one herbicide pass followed by non-chemical management. Another year of results from the pruning wound susceptibility and fungicide efficacy study provided data on critical times for application of pruning wound protection and efficacy data on fungicides used in combating grapevine trunk disease.

### Lighter Wines Programme — Diversification, New Wine Styles

**Objective:** Position New Zealand as the world leader for high quality, naturally grown lower-alcohol wines. The programme started in 2014 and runs to December 2020.





**Total Funding:** \$16.97m comprising \$8.84 from industry levies and participating companies, and \$8.13 from MPI's Primary Growth Partnership (PGP).

**Research:** Work this year has focused on market activation, and the development of the 'NZ Lighter' category branding. The research focus has shifted to exploring post-harvest technologies for the development of lighter wines, and understanding how quality lighter wines can be made from red varieties.

**Research:** The programme is nearing the end of its second year. Good progress has been made in the different research fields of Sensory perception, Chemistry, and Viticultural/Winemaking techniques which allowed us to begin to understand the concept of quality in NZ Pinot noir. This last year saw the development of an in-vitro berry culture system, as well as the development of new methodologies for measuring and understanding the chemical composition of wine.

**Pinot Noir Programme — Quality and Productivity, Diversification**

**Objective:** Growing returns through tools enabling high quality Pinot Noir production at higher yields. The programme started in 2018 and runs to February 2023.

**Total Funding:** \$10.3m comprising \$1m from industry levies and \$9.3m from MBIE's Endeavour Fund.

## BRAGATO RESEARCH INSTITUTE

**Vision:** Transforming the NZ grape and wine industry through research, innovation and extension.

**Mission:** World-leading research from grape to glass.

**Purpose:** Research to support the sustainable and diversified value growth of NZ wine.

Research to protect and enhance the competitive position and reputation of NZ wine.

New Zealand Winegrowers Research Centre Ltd now operates as Bragato Research Institute. Building on the legacy of Romeo Bragato, we plan to honour his work through world-leading research and innovation to support the continuing success of the wine industry.

The industry's levy funded research activities are now complemented and supported by the activities of Bragato Research Institute, established with MBIE funding as a Regional Research Institute, and wholly owned by New Zealand Winegrowers.

With levy funds increasingly able to focus on applied research into immediate needs and issues, BRI will build its in-house capability (people and facilities) and manage a portfolio of work to address longer term issues, and position the industry for future challenges and opportunities.

In June 2019, Dr Bruce Campbell and Dr Dianne McCarthy CNZM joined the BRI Board — bringing with them immense science skills and experience. Based on a recommendation from the

PwC Strategic Review, the BRI Board now comprises of three NZW Board Members and three independent Board Members, including an independent Chair.

During the year, BRI's work-plan and research winery business case were accepted by MBIE securing an additional \$2m funding, to confirm total MBIE funding at \$12.5m — the maximum proposed.

Other highlights of BRI's first establishment year include:

### **Climate Change programme:**

Future climate scenarios have been modelled for nine wine regions based on 15 variables and two time slices. Future research will investigate the implications of those climate scenarios for winegrowing and adaptation tools. The climate change modelling was presented in each wine region in conjunction with NIWA.

### **Design, manufacture and trialling new research fermenters:**

Our first successful vintage, with significant support from a range of industry, supplier and research partners, tested the degree of control delivered by our novel fermenters, as well as a collaboration with PFR and NMIT. These trials confirmed the research fermenters as a powerful research tool and provided ideas for improvements for fermenters to be built in the future.

### **Establishment of a national Research Winery:**

Work is underway to build a national Research Winery, located at the NMIT/MRC campus in Blenheim,

to be operational for the 2020 vintage. This is part of our vision to build an integrated hub combining winegrowing research education and industry alongside NMIT, Plant and Food Research, and other research and industry organisations.

Other projects approved for funding by BRI include:

- Evaluation of ground cover, amenity & native plants as potential reservoirs of pathogens of grapevines
- A PhD project to investigate the application of nanotechnology to vineyard agrichemicals to enable decreased and more targeted application of those treatments.
- Improving remedial surgery practices for control of grapevine trunk disease to increase vineyard longevity
- Addition of fresh grape juice to ferments in order to increase thiol production
- The Organic Focus Vineyard Project: Reassessing soil health, five years on
- A comparison of physical means to reduce rot versus chemical means in New Zealand vineyards

BRI has also co-funded work:

- Investigating Quercetin instability in wine (BRI funding of \$275,000 alongside industry (non-levy) funding of \$264,000 and Callaghan Innovation \$527,757).





## Research Projects funded by NZW 2018/2019

### Quality Wine Styles for Existing and Developing Markets

#### Lighter wine (PGP)

University of Auckland and Plant and Food Research (Various) Jointly funded by NZW and MPI Primary Growth Partnership (PGP) fund.

#### High-throughput genotyping of transposon-induced mutations in vines

Lincoln University (C Winefield)

#### Population genomics of the wine spoilage yeast *Brettanomyces bruxellensis*

Auckland University (M Goddard)

#### Low alcohol-reduced calorie wines using molecular sponges for sugar removal

University of Auckland (B Fedrizzi)

#### Shoot trimming effects on Pinot noir vine leaf area to fruit weight ratio, productivity and fruit composition

Lincoln University

#### Breaking the quality-productivity seesaw in wine grape production (Pinot Noir Programme)

University of Auckland, Plant and Food Research and Lincoln University (Various) Jointly funded by NZW and MBIE

#### UC Davis collaboration to determine factors that affect colour in Pinot noir wines when grapes are harvested at lower than target berry soluble solids

Plant and Food Research (C Grose)

#### The role of microbes in regional Pinot Noir quality and style

University of Auckland (M Goddard)

#### Exploring the chemical space in Vineyard Ecosystems (VE) Programme juices and wines

University of Auckland (B Fedrizzi)

### Pests and disease

#### Optimising management of grapevine trunk diseases for vineyard longevity

South Australian Research & Development Institute (M Sosnowski)

#### Developing powdery mildew best practise in New Zealand vineyards

A Lambourne — Supported by MPI Sustainable Farming Fund

#### Spray protocols to quantify and optimise spray deposits applied to dormant grapevines (trunks, heads, cordons and canes)

Plant and Food Research (M Walter) Supported by MPI Sustainable Farming Fund as part of the Powdery mildew best practise project.

#### Improving remedial surgery practices for control of grapevine trunk disease to increase vineyard longevity

Linnaeus (E van Zijll de Jong)

#### Biofungicide options to control powdery mildew (PM) (and *Botrytis cinerea*) on grape

Plant and Food Research (M Walter) Supported by MPI Sustainable Farming Fund as part of the Powdery mildew best practise project.

### Cost reduction/increased profitability

#### Precision Grape Yield Analyser Programme 2016-2021

Lincoln Agritech Limited (A Werner)

#### An automated grape yield estimation system — The Rod Bonfiglioli Scholarship

Massey University (M Legg)

### Sustainability/organics

#### Vineyard Ecosystems Programme

University of Auckland and Plant and Food Research (Various) Jointly funded by NZW and MBIE

#### Cost efficient optimisation of weed management in vineyards

Thoughtful Viticulture (M Krasnow)

#### Optimisation of irrigation and water savings in Marlborough Sauvignon blanc and Pinot noir and Hawke's Bay Chardonnay and Merlot

Thoughtful Viticulture (M Krasnow)

#### Future-proofing the wine sector with innovation: evaluation of ground cover, amenity & native plants as potential reservoirs of pathogens of grapevines

Plant and Food Research (V Bell)

#### The Organic Focus Vineyard Project: Reassessing soil health, five years on

Organic Winegrowers New Zealand (R Reider)

#### Monitoring the harlequin ladybird in Hawke's Bay vineyards and the surrounding habitat

Plant and Food Research (V Bell)

#### A comparison of physical means to reduce rot versus chemical means in New Zealand vineyards

Thoughtful Viticulture (M Krasnow)

## Articles

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### **BRI Pinot Noir Programme**

Various

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### **Nursery vines and grapevine trunk disease**

E van Zijll de Jong, N Hoskins and G Thorpe (Linnaeus and Vine Managers)

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### **Powdery Mildew Case Studies**

A Lambourne

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### **Developing surveillance tools for monitoring inoculum dispersal of grapevine trunk diseases**

E van Zijll de Jong and M Sosnowski (Linnaeus Laboratory and South Australian Research & Development Institute)

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### **Reducing herbicide use in New Zealand vineyards**

M Krasnow (Thoughtful Viticulture)

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### **Optimising irrigation in New Zealand vineyards**

M Krasnow (Thoughtful Viticulture)

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### **Future-proofing the wine sector with innovation: evaluation of groundcover, amenity and native plants as potential reservoirs of pathogens of grapevines**

V Bell (Plant & Food Research)

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### **What's that smell — a look into Brett**

New Zealand Winegrowers

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### **Winemaking Options for Lighter Wines**

New Zealand Winegrowers

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### **An automated grape yield estimation system**

B Parr & M Legg (Massey University)

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### **Vineyard Ecosystems: Soil and Water Services**

The Production Footprints Team & friends (Plant & Food Research)

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### **The role of microbes in regional Pinot Noir quality and style**

S Knight et al. (University of Auckland)

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### **Exploring the chemical space in juice and wine for the Vineyard Ecosystems programme Grapevine trunk disease research update**

M Sosnowski (SARDI) D Mundy (Plant & Food Research) and E van Zijll de Jong (Linnaeus Laboratory)

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### **Biofungicide options to control powdery mildew (PM) and Botrytis cinerea on grape**

K Wurms et al. (Plant & Food Research)

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### **Mechanical shaking for rot reduction**

M Krasnow (Thoughtful Viticulture) and M Allen (Allen Vineyard Advisory)

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### **Pinot Noir Volatome**

K Packer, K Parish-Virtue and B Fedrizzi (Auckland University)



## Reports

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### **Optimisation of Irrigation in New Zealand Vineyards**

M Krasnow et al.  
(Thoughtful Viticulture)

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### **Development of a Method to Assess, and Preliminary Screening of, Commercially Available Yeast Nutrient Products using Sauvignon blanc Microvin Ferments**

K Creasy (Creasy and Co)

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### **Pinot Noir Programme, Research Aim 2.5 — Ideotype Vines. Annual Report**

D Martin, C Scofield, T Rutan  
(Plant & Food Research)

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### **Pinot Noir Programme, Research Aim 2.6 — Ideotype Wines. Annual Report**

D Martin et al. (Plant & Food Research)

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### **Pinot Noir Programme, Research aim 4.1 — bunch sorting. Annual report**

D Martin and R Oliver  
(Plant & Food Research)

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### **Pinot Noir Programme, RA4.2 — Validation wines. Annual report**

C Grose et al. (Plant & Food Research)

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### **Feasibility study: New Zealand Pinot Noir in 5 global markets**

Wine Intelligence

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### **Pinot noir grape and wine phenolic profiling**

L Dias Araujo and P Kilmartin  
(University of Auckland)

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### **Synthesis and development of MS-based methods to study glycosides and free terpenoids in Pinot noir**

S Mosafari et al.  
(University of Auckland)

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### **Annual update on progress for the role of microbes in regional Pinot Noir quality and style project**

S Knight et al. (University of Auckland)

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### **Vineyard Ecosystems RA 1.1 Annual Report**

M Grevan et al. (Plant & Food Research)

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### **Vineyard Ecosystems RA 1.2 Annual Report — Relating under-vine management, biota and leafroll virus**

V Bell et al. (Plant & Food Research)

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### **Vineyard Ecosystems RA 1.3 Annual Report — Pathogen Management**

D Mundy et al.  
(Plant & Food Research)

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### **Exploring the chemical space in Vineyard Ecosystems (VE) Programme juice and wine samples**

J Wang et al. (University of Auckland)

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### **Sensory characterisation of within-brand pairs of commercial Lighter and full-strength New Zealand Sauvignon blanc wines**

B Pineau et al.  
(Plant & Food Research)

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### **Sensory characterisation of 2018 research Sauvignon blanc wines varying in the date at which the fruit was harvested and the population of berries from which they were fermented**

B Pineau et al.  
(Plant & Food Research)

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### **Effects of partial alcohol removal using reverse osmosis: outcomes, key insights gained, and perspectives for future research**

E Sherman et al.  
(Plant & Food Research)

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### **Canopy manipulations to slow sugar accumulation for the production of lower alcohol wines: Pinot gris white wine and Merlot and Pinot noir red wines**

M Krasnow et al.  
(Thoughtful Viticulture)

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### **Clones and rootstocks annual report**

V Raw et al. (Plant & Food Research)

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### **Effects of different yeast preparation, inoculation timing and ferment oxygenation methodologies on ethanol yield and varietal aroma compound formation**

F Pinu et al. (Plant & Food Research)

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### **Influence of differing mid to late fermentation temperatures on Sauvignon blanc wine composition in relation to low alcohol wine production**

C Grose et al. (Plant & Food Research)

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### **Skin contact annual report**

D Martin, C Grose and A Albright  
(Plant & Food Research)

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### **Influence of surface area to volume ratio on ethanol yield of commercial scale Pinot noir ferments**

E Sherman E, M Yvon and D Martin  
(Plant & Food Research)

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### **Future-proofing the wine sector with innovation: evaluation of groundcover and native plants as potential reservoirs of pathogens of grapevines**

V Bell et al. (Plant & Food Research)

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### **Monitoring the harlequin ladybird in Hawke's Bay vineyards, 2019**

Bell VA and Taylor T  
(Plant & Food Research)

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### **Powdery Project Final Report**

A Lambourne

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### **Mechanical shaking to reduce fungicide sprays — 2018-19 Annual report**

M Krasnow et al.  
(Thoughtful Viticulture)



RESEARCH REPORTS + ARTICLES ARE PRODUCED REGULARLY  
AND COMMUNICATED VIA THE MEMBERS' WEBSITE AT  
NZWINE.COM, EMAIL NEWSLETTERS, AND PRESENTATIONS  
GIVEN AT ANNUAL CONFERENCES, REGIONAL SEMINARS  
AND WORKSHOPS.

# 04 SUSTAINABILITY

**Over 98% of New Zealand's vineyard area is Sustainable Winegrowing NZ certified.**

## **Growing importance of sustainability**

Sustainability has been an integral part of the New Zealand wine industry for well over two decades. The 2018 PwC Strategic Review re-emphasised that our commitment to sustainable practices protects our social license to operate, assists market access and reduces risks to industry reputation.

The Strategic Review recommendations were reinforced by SWNZ member research also undertaken in 2018. Together they resulted in significant changes for our sustainability initiatives, such as:

- Aligning our sustainability goals with the United Nations Sustainable Development Goals.
- Further prioritising the focus areas of water, waste, pests and disease, climate change and people.
- Reviewing the sustainability strategy for the next five years.

- Evaluating the SWNZ programme; including the appointment of a technical advisory group of industry experts to prioritise core SWNZ goals, and update and streamline the scorecard.
- Refreshing the Sustainability Committee to re-focus as the Environment Committee.
- Recruiting a newly created position — General Manager of Sustainability — whose focus will include ensuring sustainability is embedded across all New Zealand Winegrowers' activities.

These changes demonstrate an increased commitment to elevate sustainability to a new level that is vital for the future success of our wine industry.





As well as high-level strategy planning, there have been several operational highlights in a record-breaking year, including;

- A record number of members registered for Spray Days in 2018 with 1,000 people attending session throughout the country. This popular format of hands-on, practical, grower education will be held again next year.
- A record number of SWNZ audits were undertaken by independent auditors, with 733 full-site audits and 70 desk-top audits conducted. This is the most audits ever conducted for the SWNZ programme and highlights the growth of sustainability in the industry.
- The New Zealand wine sustainability story was also presented to a record number of audiences this year with presentations being undertaken at the International Sauvignon Blanc Conference, visiting delegations from Chile and China, International Masters of Wine classes, Romeo Bragato Conference, Young Viticulturist Education Days, Grape Days, Spray Days, and student classes at NMIT and Lincoln University.



CHURTON

## Continuous improvement

Central to our sustainability policy is a commitment to keep improving and evolving, in order to maintain our position as a world leader. This year we have developed a new policy to remove alkylphenol ethoxylates (APEs) from the wine industry. There has been overwhelming support for this initiative from members and the supply chain to eliminate these endocrine disrupting chemicals from use.

The success of the SWNZ Continuous Improvement ‘winery waste’ group also continued this year with plans to develop similar groups in the other focus areas and regions.

## Organics — Great wine is in our nature

Organic wine production in New Zealand continues to flourish and grow, with over 70 wineries now making certified organic wines.

Organic Winegrowers New Zealand (OWNZ) continues to focus on providing education and information on organic practices to growers and winemakers, with New Zealand Winegrowers providing support and funding for these initiatives to benefit the wine industry as a whole.

Knowledge-sharing is a hallmark of the New Zealand organic community. The third Organic and Biodynamic Winegrowing Conference, held in June 2019 in Marlborough, attracted a sell-out audience of over 350 growers and winemakers who attended three days of talks and tastings.

New marketing initiatives are also helping us share New Zealand organic wine with the world. The inaugural Organic Wine Week, pioneered in September 2018, was a shining success. Restaurants and retailers up and down New Zealand, and in the UK, enthusiastically got behind the initiative, hosting organic wine tastings, seminars and winemaker dinners. Organic Wine Week is now set to become an annual fixture, with plans to expand in 2019.

As the number of certified producers grow, Organic Winegrowers New Zealand has adopted the tagline “Great wine is in our nature”, highlighting the relationship many growers observe between organic production and excellent wine quality.

## Biosecurity — Building industry capability to mitigate risk

It is critical that New Zealand vineyards are fully prepared to respond to any biosecurity incursion that has the potential to threaten the industry. This year we have focused on increasing our influence as a partner in New Zealand’s biosecurity readiness and response decision making, and deepening our engagement with members to ensure their awareness of biosecurity risks and participation in biosecurity activities.

Through the Government Industry Agreement, NZW chairs the Brown Marmorated Stink Bug Council, the group of industry organisations which, alongside MPI, are responsible for making readiness and response decisions for this high priority pest.

During 2018/19 the BMSB Council’s plans were tested for the first time with investigations being launched in Mount Maunganui and Glenfield in response to the post border detections of individual bugs. Both investigations were successfully completed with no further bugs being found.

As our relationship with the government continues to mature under GIA, we are beginning to see more decisions that reflect the industry’s priority to prevent BMSB from establishing. This high-risk season we saw MPI take action to redirect car carrying vessels that were heavily contaminated with BMSB. This led them in turn to new regulations on the importation of sea containers from Italy and vehicles, machinery and equipment from a wide range of countries to mitigate the risk of entry. In addition, in May 2019 the our Biosecurity Advisor joined an Australian and New Zealand government delegation that visited the Republic of Georgia to learn about the Georgian long term BMSB management programme, that aims to eradicate the pest from the country.

NZW also chairs the Xylella Action Group, a group of industry organisations that has partnered with MPI through a Sustainable Farming Fund “Tere” project. The aim of this project is to conduct research which examines the risks to New Zealand’s primary industries from this most unwanted pest. The results of this research will help those involved to develop cost share arrangements, so that impacted parties can develop

joint readiness initiatives for *Xylella fastidiosa* like those which have been done for BMSB.

2018/19 has seen the spread of the harlequin ladybird to almost all New Zealand's wine regions. While no ladybirds were reported to be aggregating in bunches at harvest time NZW, in conjunction with the Bragato Research Institute, has adopted a precautionary approach. Together we have invested in further research to learn more about the ladybird's biology and behavior to determine if it is going to be a problem for the industry in the future.

Throughout the year we have been proactive in promoting the "Ko Tātou — This is us" message, which highlights that biosecurity is everyone's responsibility. These activities included the launch of the 'Being a Biosecurity Champion' programme in collaboration with the Bayer Young Viticulturist of the Year education days. These regional events highlighted the importance of biosecurity best practice to an emerging group of industry leaders. This programme, in combination with presentations at Grape Days, highlighted new tools and practices that can be implemented in the vineyard to protect members from the risks posed by unwanted pests and diseases.

Increasing our influence with government and the continued focus of member focused extension activities will continue to be high priorities in 2019/20 and in future years.

#### **Submissions to Government made in 2018-19**

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##### **June 2019**

Submission on the proposed changes to the Import Health Standards for Vehicles, Machinery and Equipment and Sea Containers from All Countries, dated 3 June 2019.

#### **Decisions in partnership with Government**

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##### **December 2018**

Post border detection of Brown Marmorated Stink Bug in Mt Maunganui.

**Outcome:** Investigation launched — no further bugs detected

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##### **January 2019**

Post border detection of Brown Marmorated Stink Bug in Glenfield Auckland.

**Outcome:** Investigation launched — no further bugs detected

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##### **May 2019**

Assessment of Georgia's BMSB management programme.  
NZ Winegrowers Biosecurity Advisor

**“The NZ wine industry is in a very strong position with all the building blocks in place in terms of knowledge, organisation, communication, enthusiasm, talent and terroir (and brand recognition) and it is fantastic to see wineries and growers collaborating together for the common good, under the umbrella of sustainability”**

Monty Waldin,  
[chateaumonty.com](http://chateaumonty.com), UK



# 05 MARKETING AND EVENTS



The demand for New Zealand wine continues to rise in international markets, with total export value increasing 6% to \$1.83 billion for the year ended June 2019.



CHARDONNAY AND SPARKLING SYMPOSIUM 2019

At a retail level, this translates to \$7+ billion dollars of New Zealand wine sold around the world annually, something to raise a glass to.

The premium reputation of New Zealand wine translates to real value in our major markets, where New Zealand remains either the highest or second highest priced wine category in the USA, UK, Canada, and China.

This premium reputation of New Zealand wine is constant factor that informs all of our Marketing activity, alongside our other brand pillars of varietal and regional diversity, and importantly, sustainability.

The NZW Marketing Programme is focused on developing and supporting the growth of the New Zealand wine brand, and creating value for members in the following key areas:

- **International Visits:** to develop strong relationships with influencers in key markets
- **International Education:** to increase engagement with key trade, media and educators
- **Wine Tourism:** to help wineries maximise revenue from tourists
- **Events:** to provide members with a platform to tell their story

The main highlight this year was Sauvignon 2019; a celebration that attracted some of the world's top international wine producers, experts and key influencers to New Zealand. This major event helped contribute to EAV (Equivalent Advertising Value) of \$3.2 mil, and provided a platform to continue to drive the diversity messaging of New Zealand Sauvignon Blanc around the world.

## International Visitor Programme 2018-2019

Number of international visitors hosted

# 74

17 from the USA  
17 from the UK & Ireland  
9 from Europe  
1 from the UAE  
4 from Canada  
12 from Asia  
14 from Australia



Satisfaction rate (post visit survey result)

# 100%

EAV in print articles

# \$3.2 m

## 336 million people told about New Zealand Wine

“Once, not too long ago, I could visit almost all of the noteworthy wine producers in New Zealand in the course of a two-week visit. No longer. With more than 700 wineries now operating, I’d venture to say New Zealand has moved further and faster than most other wine-producing nations.”

Joe Czerwinski, Wine Advocate, USA

“From start to finish, the planning and organisation, hospitality and calibre of events and tastings was absolutely world class and it’s an experience that will stay with me forever. I’ve met some wonderful people, tasted some incredible wines and forged a lifelong bond with New Zealand. I was blown away by the respect and collaboration the wine industry out there has for one another. Something that we can all learn from!”

Victoria Anderson, Wine Buyer, Booths UK

Number of sommeliers attended  
the Sommit™ in Hawke’s Bay

# 19

Number of regional & national events across 9 regions  
(Organised with regional associations for groups surrounding Sauvignon 2019)

# 13



## International Education Programme 2018-2019

Attendees likely to list/write/educate  
(post seminar survey result)

# 97%

Satisfaction rate (post seminar survey result)

# 99%

"The first Friday in May was International Sauvignon Blanc Day, which may have come and gone without you noticing. I'm aware of it only because a couple of weeks ago I took part in a fascinating blind tasting in anticipation of the great day... This tasting - unusually and delightfully - was organised and hosted by both interested parties acting in unison."

Jancis Robinson MW, 'France v New Zealand - who makes the best Sauvignon blanc?'

Number of seminars, masterclasses, education programmes and self-pouring tastings in 14 countries

# 81

19 in the USA  
14 in the UK & Ireland  
6 in Europe  
18 in Canada  
14 in Asia\*  
9 in Australia  
1 in the UAE  
\*(with support from NZTE)



Over 700 individual wines poured from over 200 individual wineries

## To over 4,500 trade & media attendees and 9,500 consumers of which 95% were A List or B List

**A List** Directly involved in purchase or media decisions  
**B List** - Indirectly involved in purchase or media decisions

Thanks to our partners



## Marketing Programme and Events by Market

### ● Marketing programme

Seminars— 19  
Trade & Media Attendees— 1,962  
Consumer Attendees— 2,085  
Trade & Media Visits to NZ— 17

### ● User pays event programme

Events— 7  
Trade & Media Attendees— 500+  
Consumer Attendees— 2,500+  
Wineries Showcased— 164  
Wines Poured— 456

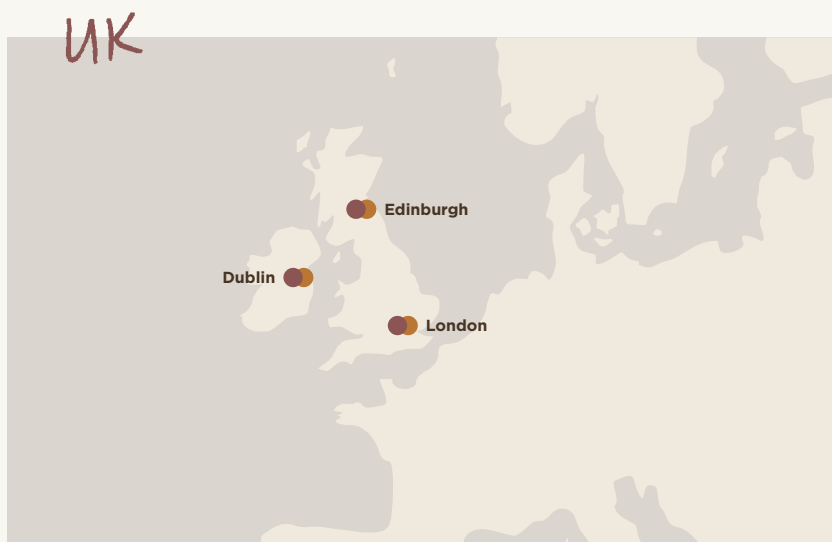


### ● Marketing programme

Seminars— 12  
Trade & Media Attendees— 268  
Consumer Attendees— 161  
Trade & Media Visits to NZ— 17

### ● User pays event programme

Events— 6  
Trade & Media Attendees— 1844  
Consumer Attendees— 2,665  
Wineries Showcased— 121  
Wines Poured— 647



### ● Marketing programme

Seminars— 7  
Trade & Media Attendees— 217  
Consumer Attendees— N/A  
Trade & Media Visits to NZ— 10

### ● User pays event programme

Events— 3  
Trade & Media Attendees— 60,170\*  
Consumer Attendees— 479  
Wineries Showcased— N/A  
Wines Poured— 340

\* 60,000 at ProWein



## AUSTRALIA



### ● Marketing programme

Seminars— 9  
Trade & Media Attendees— 115  
Consumer Attendees— 6,650  
Trade & Media Visits to NZ— 14

### ● User pays event programme

Events— 3  
Trade & Media Attendees— N/A  
Consumer Attendees— 140  
Wineries Showcased— 20  
Wines Poured— 26

## CANADA



### ● Marketing programme

Seminars— 18  
Trade & Media Attendees— 1,319  
Consumer Attendees— 916  
Trade & Media Visits to NZ— 4

### ● User pays event programme

Events— 14  
Trade & Media Attendees— 1,960  
Consumer Attendees— 55,377\*\*  
Wineries Showcased— 171  
Wines Poured— 454

\*\* 25,000 at Vancouver Wine Festival &  
13,500 at Rocky Mountain Wine Festival

## ASIA



### ● Marketing programme

Seminars— 14  
Trade & Media Attendees— 792  
Consumer Attendees— N/A  
Trade & Media Visits to NZ— 12

### ● User pays event programme

Events— 3  
Trade & Media Attendees— 1,283  
Consumer Attendees— 479  
Wineries Showcased— 37  
Wines Poured— 196



Number of international wine tourists

776,599

Spending by wine tourists

\$3.26b

**The international wine  
tourist stays 3.5 days  
longer than the average  
holiday visitor and  
visits more regions**

– 4.2 versus 3.5 regions



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The international wine tourist spends more than the average holiday visitor by

27%

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International visitors that went to a winery

23%

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DON'T LISTEN TO WHAT THEY SAY. GO SEE FOR YOURSELF. NEW ZEALAND. WE SHOULD ALL TRAVEL MORE, ESPECIALLY TO DESTINATIONS LIKE THIS. TO TOP IT OFF, THERE ARE SOME AMAZING WINES CREATED HERE, SO... WHAT ARE YOU WAITING FOR?!

Amy Lieberfarb  
Wine Blogger, USA

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Visitors who cycled and also visited a winery

46%

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Visitors who golfed and also visited a winery

46%

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Propensity of the top international visitor markets to visit a winery

United Kingdom 36%

USA 35%

Australia 25%

China 17%

Source IVS (International Visitor Survey)  
- Year End March 2019

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256 wineries offer a total of 436 wine tourism experiences on [nzwine.com/visit](https://nzwine.com/visit)

Sip 216  
Experiences

Dine 109  
Experiences

Stay 61  
Experiences

Play 50  
Experiences

- Source NZW - Year End March 2019



## Major Events

### Sauvignon 2019

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#### \$2million EAV

(Equivalent Advertising Value) in print articles

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#### 190 million Reach

(UVPM + circulation + followers)

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#### 100+ International delegates

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#### 24 Guest speakers

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#### 60 Wineries showcased

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#### 536 Wines poured

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#### 6 Regions represented

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#### Social Reach

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#### 355,550 Impressions

(Viewed content across all our social media channels)

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#### 40,495 likes and comments

(Total number of likes and comments on #Sauvignonnz posts)

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### Chardonnay & Sparkling Symposium 2019

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#### 64 International delegates

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#### 7 Guest speakers

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#### 71 Wineries showcased

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#### 118 Wines poured

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#### 9 Regions represented

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THE SUN HAS SET ON SAUVIGNON 2019 BUT IT SEEMS THERE'S A NEW DAWN FOR PRODUCERS, EXPLORING SITES + STYLES, THE WINES CLEARLY DEMONSTRATING THERE'S MORE DIVERSITY IN NZ SAUVIGNON THAN EVER BEFORE.

Rebecca Gibb MW  
Wine Journalist, UK







CHARDONNAY AND SPARKLING SYMPOSIUM 2019

CULTURE WAS A BIG PART OF THE CONVERSATION... BUT MORE SIGNIFICANT THAN THAT, CULTURE WAS DEEPLY INGRAINED IN THE EXPERIENCE OF SIMPLY BEING IN THIS COUNTRY. I LEAVE NEW ZEALAND TODAY WITH A BETTER UNDERSTANDING OF ITS WINES AND WINE REGIONS.

Kate Symons  
MINDFOOD Magazine, Australia

## Online

nzwine.com

Website Users in FY19:

274,704

Pageviews in FY19:

1,088,410

## Social Media

Our social media goal over the past year was to increase engagement with members, and grow our community of highly engaged New Zealand wine lovers.

WE CREATED TWO FACEBOOK GROUPS EXCLUSIVELY FOR MEMBERS: NZ WINE KAITIAKI, A FORUM FOR MEMBERS TO LEARN + DISCUSS SUSTAINABILITY, SWINZ AND BIOSECURITY, AND NZ WINE MARKETING, FOR MEMBERS TO INTERACT WITH THE MARKETING, EVENTS + COMMUNICATIONS TEAMS.

Impressions

3.5m

Engagements

76.5k

Increase in engagement over the past year

57%

Mentions on #nzwine

115,400

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## Key campaigns

### # CELLAR DOOR DAY

#### Pilot campaign, October 2018

Increase of visitors in October  
to [nzwine.com/visit](https://nzwine.com/visit)

174%

Toolkit created and used by  
67 members

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#### Sauvignon 2019/ Chardonnay and Sparkling Symposium social support, January 2019

The top lifestyle visitors had a  
combined audience of;

Twitter

229,343

Instagram

59,453

Mentions of #sauvignonNZ + stories

2697

#### Vintage Competition for members

#### User generated competition, March-April 2019

Entries from every wine region

1600+

Highest engagement of all time  
on winner announcement post.

### # SAUV BLANC DAY

#### Consumer campaign, May 2019

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Engagement level increase from 2018

468%

Impressions

1.45m

Engagements

242k

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Downloads of the toolkit created for members

466

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Mentions of #sauvblanc

8360



# New Zealand Wine of the Year™ 2018

## Top Trophies

### New Zealand Wine of the Year™

#### Champion Sponsored by O-I

#### New Zealand

Maude Pinot Noir Central Otago 2017

### Best Organic White Wine

Carrick Bannockburn Riesling Central Otago 2017

### Best Organic Red Wine

Carrick Bannockburn Pinot Noir Central Otago 2015

### Best Single Vineyard White Wine

Isabel Estate Wild Barrique Chardonnay Marlborough 2017

### JF Hillebrand New Zealand Best Single Vineyard Red Wine

Craggy Range Pinot Noir Te Muna Road Vineyard Martinborough 2016

### Label and Litho Limited Best Open White Wine

Dashwood Sauvignon Blanc Marlborough 2018

### QuayConnect Best Open Red Wine

Waipara Hills Pinot Noir Rosé Waipara Valley 2018

### Best Wine of Provenance

Auntsfield Cob Cottage Chardonnay 2016, 2010, 2006

## Varietal Trophies

### WineWorks Champion Sparkling Wine

Nautilus Cuvée Méthode Traditionnelle Marlborough NV

### Riedel New Zealand Champion Gewürztraminer (Nick Nobilo Trophy)

Lawson's Dry Hills Gewürztraminer Marlborough 2016

### Dish Magazine Champion Pinot Gris (Brother Cyprian trophy)

Misty Cove Wines Pinot Gris Marlborough 2018

### Plant & Food Research Champion Riesling (Friedrich Wohnsiedler Trophy)

Wither Hills Riesling Marlborough 2018

### Antipodes Water Company Champion Sauvignon Blanc (Spence Brothers Trophy)

Blind River Sauvignon Blanc Awatere Valley, Marlborough 2018

### Guala Closures Champion Chardonnay (Bill Irwin Trophy)

Marisco Craft Series 'The Pioneer' Chardonnay Marlborough 2016

### Champion Other White Wine

Misty Cove Wines Landmark Series Grüner Veltliner Marlborough 2018

### Champion Sweet Wine

Auntsfield Busch Block Late Harvest Riesling Southern Valleys, Marlborough 2016

### New World Champion Rosé

Archangel Lace Rosé Central Otago 2018

### Fruitfed Supplies Champion Pinot Noir (Mike Wolter Memorial Trophy)

Maude Pinot Noir Central Otago 2017

### Champion Merlot Cabernet and Blends (Tom McDonald Memorial Trophy)

Villa Maria Reserve Cabernet Sauvignon Merlot Gimblett Gravels, Hawke's Bay 2016

### winejobsonline.com Champion Syrah (Alan Limmer Trophy)

Villa Maria Reserve Syrah Gimblett Gravels, Hawke's Bay 2016

### Champion Other Red Styles

Church Road One Malbec Gimblett Gravels, Hawke's Bay 2016

## Regional Trophies

### Best Wine — Hawke's Bay

Villa Maria Reserve Syrah Gimblett Gravels, Hawke's Bay 2016

### Best Wine — Gisborne

Villa Maria Reserve Barrique Fermented Chardonnay Gisborne 2016

### Best Wine — Wellington Wine Country

Craggy Range Pinot Noir Te Muna Road Vineyard Martinborough 2016

### Best Wine — Marlborough

Marisco Craft Series 'The Pioneer' Chardonnay Marlborough 2016

### Best Wine — Nelson

Falcon Ridge Estate Pinot Noir Nelson 2017

### Best Wine — Canterbury

Waipara Hills Pinot Noir Rosé Waipara Valley 2018

### Best Wine — Central Otago

Maude Pinot Noir Central Otago 2017

"THIS IS A REFRESHED COMPETITION  
BASED ON AN ENTIRELY NEW CONCEPT.  
WE ARE FOCUSING ON THINGS THAT  
ARE IMPORTANT TO OUR INDUSTRY,  
BY INTRODUCING NEW AWARDS SUCH  
AS BEST SINGLE VINEYARD AND BEST  
ORGANIC WINES... THIS IS A REVAMPED  
INDUSTRY AWARDS THAT IS LOOKING  
TOWARD THE FUTURE."

Warren Gibson,  
Chair New Zealand Wine of the Year™







# 06 INFORMATION RESOURCES

# 07 FINANCIALS

# 08 STATISTICS



## 06 Information Resources

**New Zealand Winegrowers information resources are highly valued by our members. A core function of New Zealand Winegrowers is the provision of up-to-date information delivered in a timely manner to members, trade, media and consumers.**

All of the information published by New Zealand Winegrowers is available online at either [nzwine.com](http://nzwine.com) or [nzwine.com/members](http://nzwine.com/members)

New Zealand Winegrowers also produces a wide range of printed publications, brochures and promotional items, ranging from spray schedules to varietal sales guides.

### Industry Reports & Statistics

Domestic Market Reports  
Export Market Reports  
Export Statistics  
Import Statistics  
Average Grape Price Data Statistics  
New Zealand Wine Key Performance Indicators and Snapshots  
Vintage Survey Reports and Indicators  
New Zealand Winegrowers Spray Schedule  
Vineyard Register Reports and Regional Snapshots  
Viticulture Financial Benchmarking Reports and Key Performance Indicators  
Sustainable Winegrowing New Zealand National and Individualised Reports  
Biosecurity Fact Sheets and Best Practice Guides  
Vinefacts

### Labelling and International Market Access

International Labelling Guide (28th Edition) December 2018  
International Labelling Matrix Guide Poster (26th Edition)

### Vineyard, Winemaking and Cellar Door Practices

International Winemaking Practices Guide (11th Edition) June 2017

### Labour/ Health and Safety/ Legal

Working For You  
Working Well — New Zealand Winegrowers and Worksafe New Zealand  
Legal Guide — New Zealand Winegrowers and Bell Gully

### Marketing and Communication

What's Fermenting — monthly e-newsletter to members  
Bragato Research Institute Newsletter — quarterly e-newsletter to members  
New Zealand Winegrower Magazine — published by Rural News Group Ltd under Authority of New Zealand Winegrowers  
New Zealand Winegrowers Post Event and Seminar Reports  
New Zealand Wine Varietal and Regional Guides  
New Zealand Wine Educational Textbook (available in English & Mandarin)  
New Zealand Wine Overview Presentation  
Guides to market (Australia, Canada, Germany, Ireland, The Netherlands, Poland, Sweden, UK & USA)  
Debra Meiburg's Guide to the Wine Trade (Beijing, Hong Kong, Shanghai, Singapore, Taiwan)  
Pricing Calculators (Australia, Canada LCBO & BCLDB, UK, USA, China, Germany, Japan, Sweden, The Netherlands, Singapore)  
Euromonitor Country Market Reports for 27 Countries  
Nielsen Scantrak Data Reports (UK)  
Wine-Searcher Report — Trends in Key Markets for New Zealand Wine (USA, UK, Europe, Canada, Asia & Australia)  
Wine Intelligence Chinese Wine Market Landscape Report  
Member Toolkits for digital campaigns (#SauvBlanc Day, Pinot Noir Day)

High-level breakdown  
(Year to 30 June 2019)

New Zealand Winegrowers Incorporated is the industry organisation of and for the wine makers and grape growers of New Zealand.

These are the accounts for New Zealand Winegrowers Incorporated and its subsidiaries, NZW Wines Limited Partnership and New Zealand Winegrowers Research Centre Limited trading as Bragato Research Institute.

Operating income includes the grape and wine levies. These are used to fund marketing, research, environment and advocacy activities.

User Pays activities includes marketing events in New Zealand and overseas, the Sustainable Winegrowing New Zealand programme, provision of the Wine Export Certification Service, Romeo Bragato Conference and Young Viticulturist and Winemaker Competitions.

The Bragato Research Institute is providing world-leading science, research and innovation to benefit New Zealand’s entire grape and wine industry.

NZW Wines Limited Partnership’s activity is research into production and other aspects of lower alcohol and lower calorie wine.

The financial information presented has been extracted from the audited financial statements of New Zealand Winegrowers Incorporated for the year ended 30 June 2019.

Operating Income

**\$22.8m** ↑ 20%

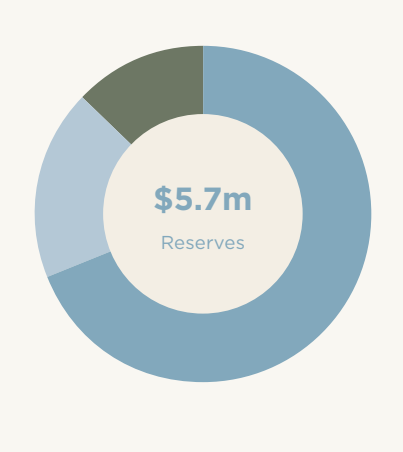
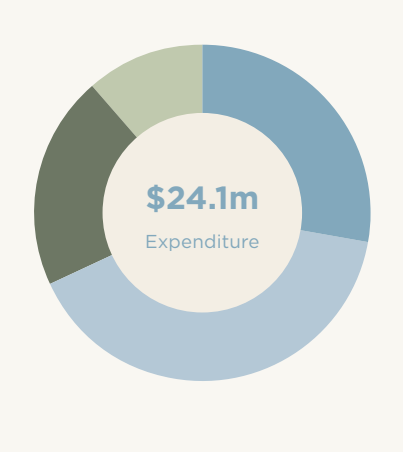
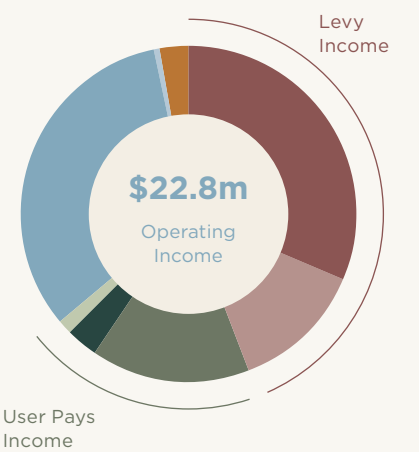
Expenditure

**\$24.1m** ↑ 15%












Reserves

**\$5.7m** ↓ 17%

Operating Income Expenditure and Reserves Summaries



## Breakdown of expenditure by objective

Key Achievements		Levy	Non Levy
<b>Research &amp; Innovation</b>			
23 projects funded	\$2.2m		\$6.6m
NZW Research Centre Ltd now operating as Bragato Research Institute	↓ 16%		↑ 49%
<b>International Marketing &amp; Tourism</b>			
74 international trade & media	\$3.1m		\$1.3m
36 in-market events	↑ 15%		↓ 24%
79 in-market seminars			
<b>Administration</b>			
Strategic review completed and implementation begun	\$2.1m		\$0.3m
	↑ 19%		↑ 145%
<b>Events in New Zealand</b>			
International Sauvignon Blanc Conference	\$0.09m		\$2.5m
Sommelier Sommits™	↑ 22%		↑ 94%
NZ Wine of the Year			
<b>Environment</b>			
Sustainable Winegrowing Programme	\$0.4m		\$0.9m
Spray Schedule	↓ 54%		↑ 26%
<b>Member information</b>			
800 attended Grape Days	\$1m		\$0.4m
Romeo Bragato Conference	↓ 13%		↓ 1%
Vinefacts and Spray days			
<b>Regions</b>			
Regional Membership Council	\$1.1m		
Regional funding	↑ 7%		
Contestable Fund			
<b>International Trade (Advocacy)</b>			
Attendance at FIVS, WWTG, OIV, APEC meetings	\$0.4m		\$0.3m
OIV – Director General Election Campaign	↓ 9%		↑ 6%
5 International Submissions & Policy Proposals			
<b>Domestic Trade (Advocacy)</b>			
Cheers!	\$0.9m		
11 Domestic Submissions & Policy Proposals	↓ 7%		
<b>People</b>			
Women in Wine	\$0.1m		\$0.1m
Labour Strategy and RSE	↑ 23%		↑ 1%
Young Vit & Winemaker Competitions			
<b>Biosecurity</b>			
Increased investment in Biosecurity	\$0.3m		
	↑ 70%		
<b>Total</b>	\$11.7m		\$12.4m
	↓ 2%		↑ 37%
<b>Total Expenditure</b>			\$24.1m
			↑ 15%



## 08 Statistics

### Summary of New Zealand Wine (2010-2019)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Number of wineries	672	697	703	698	699	673	675	677	697	716
Number of growers	1128	853	824	835	858	762	747	726	699	692
Producing area (hectares)	33,200	34,500	35,337	35,182	35,510	35,463	36,226	36,943	38,073	38,680*
Average yield (tonnes per hectare)	8.0	9.5	7.6	9.8	12.6	9.1	12.0	10.7	11.0	10.7
Average grape price (NZ\$ per tonne)	1,293	1,239	1,359	1,688	1,666	1,732	1,807	1,752	1,841	N/A
Tonnes crushed (thousands of litres)	266	328	269	345	445	326	436	396	419	413
Total production (millions of litres)	190.0	235.0	194.0	248.4	320.4	234.7	313.9	285.1	301.7	297.4
Domestic sales of NZ wine (millions of litres)	56.7	66.3	64.6	51.7	49.9	61.9	56.2	52.1	53.6	50.6
Consumption per capita NZ wine (litres)	13.0	15.2	14.7	11.6	11.2	13.7	12.2	11.0	10.9	10.3
Total domestic sales of all wine (millions of litres)	92.1	93.9	91.9	92.5	90.6	96.0	93.4	92.0	94.5	93.1
Consumption per capita all wines (litres)	21.1	21.3	20.9	20.8	20.3	21.2	20.2	19.5	19.2	18.9
Export volume (millions of litres)	142.0	154.7	178.9	169.6	186.9	209.4	213.4	253.0	255.0	270.0
Export value (millions of NZ\$ FOB)	1,041	1,094	1,177	1,210	1,328	1,424	1,570	1,663	1,705	1,825

N/A - Not yet available

\* Estimate only

## New Zealand Winegrowers Membership (2010-2019)

Wineries by size <sup>1</sup>	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Small	605	615	622	617	611	587	581	582	603	624
Medium	61	72	71	71	65	69	78	77	77	73
Large	6	10	10	10	23	17	16	18	17	19
<b>Total</b>	<b>672</b>	<b>697</b>	<b>703</b>	<b>698</b>	<b>699</b>	<b>673</b>	<b>675</b>	<b>677</b>	<b>697</b>	<b>716</b>

<sup>1</sup> Small — annual sales not exceeding 200,000 litres Medium — annual sales between 200,000 and 2,000,000 litres

Large — annual sales exceeding 2,000,000 litres

Wineries by region	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Northland	14	15	16	13	15	14	15	16	17	20
Auckland	111	117	118	116	114	111	110	109	102	102
Waikato/Bay of Plenty	21	17	15	13	13	12	9	8	10	7
Gisborne	26	24	24	21	19	18	18	18	17	16
Hawke's Bay	85	91	84	77	76	75	76	79	91	98
Wairarapa	63	64	64	65	67	67	68	64	69	72
Nelson	36	38	36	38	37	35	36	36	38	42
Marlborough	137	142	148	152	151	140	141	139	141	150
Canterbury/Waipara	61	66	68	70	66	67	64	65	67	68
Central Otago	111	115	120	124	132	127	133	137	136	135
Waitaki Valley									4	4
Other Areas	7	9	10	9	9	7	5	6	5	4
<b>Total</b>	<b>672</b>	<b>698</b>	<b>703</b>	<b>698</b>	<b>699</b>	<b>673</b>	<b>675</b>	<b>677</b>	<b>697</b>	<b>716</b>

Grape growers by region	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Auckland/Northland	44	17	9	11	11	10	5	4	3	8
Waikato/Bay of Plenty	11	2	2	2	0	0	0	0	0	0
Gisborne	87	57	54	53	48	41	41	36	33	31
Hawke's Bay	171	122	103	104	102	74	71	65	62	58
Wairarapa/Wellington	48	24	24	30	17	14	15	17	13	14
Nelson	62	39	38	40	52	38	36	37	35	27
Marlborough	568	544	551	548	581	535	534	519	510	509
Canterbury/Waipara	60	13	8	14	15	18	14	14	9	13
Otago	77	35	35	33	32	32	31			
Central Otago								33	33	32
Waitaki Valley								1	1	0
<b>Total</b>	<b>1,128</b>	<b>853</b>	<b>824</b>	<b>835</b>	<b>858</b>	<b>762</b>	<b>747</b>	<b>726</b>	<b>699</b>	<b>692</b>

Grower Membership has previously been reported as Otago, now split into Central Otago and Waitaki Valley.

## New Zealand Producing Vineyard Area (2010-2019)

By grape variety (ha)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019*
Sauvignon Blanc	16,910	16,758	20,270	20,015	20,029	20,497	21,400	22,230	23,426	24,037
Pinot Noir	4,773	4,803	5,388	5,488	5,509	5,514	5,519	5,572	5,588	5,625
Chardonnay	3,865	3,823	3,229	3,202	3,346	3,117	3,116	3,114	3,106	3,167
Pinot Gris	1,763	1,725	2,485	2,403	2,451	2,422	2,439	2,369	2,471	2,488
Merlot	1,371	1,386	1,234	1,255	1,290	1,239	1,198	1,211	1,133	1,133
Riesling	986	993	770	787	784	767	753	721	679	590
Syrah	297	299	387	408	433	436	426	439	432	441
Cabernet Sauvignon	519	519	305	301	289	275	253	249	250	221
Gewürztraminer	314	313	347	334	376	277	242	229	221	217
Malbec	157	157	140	142	127	129	119	121	114	115
Sauvignon Gris**						104	113	109	105	105
Viognier**						129	119	97	97	94
Cabernet Franc	161	161	119	119	113	109	99	91	97	98
Other varieties	2,312*	2,723*	661	728	764	448	430	391	354	349
<b>Total</b>	<b>33,428</b>	<b>33,660</b>	<b>35,335</b>	<b>35,182</b>	<b>35,511</b>	<b>35,463</b>	<b>36,226</b>	<b>36,943</b>	<b>38,073</b>	<b>38,680</b>

By region (ha)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019*
Auckland/Northland	550	556	411	414	392	403	387	387	392	392
Waikato/Bay of Plenty	147	147	24	24	25	16	3	13	15	15
Gisborne	2,083	2,072	1,635	1,599	1,915	1,440	1,350	1,246	1,181	1,190
Hawke's Bay	4,947	4,993	5,030	4,846	4,774	4,638	4,641	4,615	4,678	4,771
Wairarapa	871	882	979	991	995	1,003	1,005	932	969	983
Marlborough	19,295	19,024	22,956	22,819	22,907	23,452	24,365	25,244	26,288	26,850
Nelson	842	861	1,011	1,095	1,123	1,141	1,135	1,093	1,162	1,154
Canterbury/Waipara	1,779	1,809	1,371	1,435	1,488	1,428	1,419	1,472	1,475	1,383
Central Otago	1,540	1,540	1,917	1,959	1,932	1,942	1,880	1,886	1,873	1,884
Waitaki Valley							41	55	58	58
Other & Unknown	1,374	1,516								
<b>Total</b>	<b>33,428</b>	<b>33,400</b>	<b>35,334</b>	<b>35,182</b>	<b>35,551</b>	<b>35,463</b>	<b>36,226</b>	<b>36,943</b>	<b>38,073</b>	<b>38,680</b>

\* Projections submitted in the 2018 Vineyard Register

\*\* Reported separately since 2015

Central Otago and Waitaki Valley reported separately from 2016

Source: New Zealand Winegrowers Vineyard Survey/Vineyard Register Reports



## New Zealand Vintages (2010-2019)

By Grape Variety (tonnes)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Sauvignon Blanc	174,247	224,412	181,121	228,781	310,240	216,078	303,711	285,862	296,573	302,157
Pinot Noir	23,655	31,156	23,285	31,775	36,499	25,763	35,661	28,760	35,095	26,944
Chardonnay	26,322	25,580	22,855	27,184	28,985	27,015	29,162	26,843	26,371	25,729
Pinot Gris	12,810	17,787	15,347	22,042	23,880	19,707	24,892	20,755	22,824	20,953
Merlot	8,885	9,092	8,046	10,076	10,756	9,397	9,321	7,714	10,623	9,240
Riesling	5,416	6,118	4,989	5,932	6,013	4,535	5,937	3,880	3,776	4,776
Syrah	2,112	1,741	1,431	2,240	2,178	1,497	1,756	1,733	2,126	2,230
Cabernet Sauvignon	2,203	1,667	1,120	1,465	1,742	1,376	1,537	974	1,169	1,076
Sauvignon Gris							1,182	944	1,080	1,002
Gewürztraminer	1,556	1,836	1,249	1,788	2,264	1,761	2,221	1,047	976	834
Malbec	761	764	694	825	1,135	586	483	697	782	741
Other Reds	602	556	307	262	537	457	677	401	456	506
Cabernet Franc	552	488	414	421	582	485	616	373	350	473
Grüner Veltliner					341	228	276	253	329	347
Viognier	854	781	839	519	1,148	720	771	266	444	318
Semillon	1,362	689	596	721	507	425	466	249	385	304
Alberino									162	269
Other Whites	848	898	618	1,052	1,646	1,294	727	824	250	232
Muscat Varieties	793	550	578	634	455	301	329	450	323	200
Pinotage	467	476	292	400	425	494	374	145	153	142
Arneis			163	220	336	268	257	239	152	91
<b>Survey total</b>	<b>263,445</b>	<b>324,591</b>	<b>263,944</b>	<b>336,337</b>	<b>429,669</b>	<b>312,387</b>	<b>420,356</b>	<b>382,409</b>	<b>404,399</b>	<b>398,564</b>
<b>Industry total*</b>	<b>266,000</b>	<b>328,000</b>	<b>269,000</b>	<b>345,000</b>	<b>445,000</b>	<b>326,000</b>	<b>436,000</b>	<b>396,000</b>	<b>419,000</b>	<b>413,000</b>

By Region (tonnes)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Northland	178	111	92	130	210	203	92	121	113	319
Auckland	1,325	1,464	1,220	789	1,392	824	1,267	934	787	1,585
Waikato/Bay of Plenty	118	51	7	12	63	ND	18	ND	ND	ND
Gisborne	18,316	14,450	15,590	15,567	16,192	17,280	15,944	16,337	13,000	16,238
Hawke's Bay	38,860	35,533	32,793	38,829	44,502	36,057	42,958	33,679	41,061	37,173
Wairarapa	3,942	3,598	4,271	4,798	5,743	3,559	5,049	3,822	4,592	4,390
Marlborough	182,658	244,893	188,648	251,630	329,571	233,182	323,290	302,396	313,038	305,467
Nelson	5,963	7,854	6,129	7,777	10,494	6,777	10,028	8,540	9,120	12,370
Canterbury/Waipara	5,870	9,485	7,079	8,348	10,962	5,395	12,170	8,240	11,157	8,534
Central Otago	6,196	7,104	8,115	8,407	10,540	8,951	9,177	8,324	11,358	11,868
Waitaki Valley									170	41
Other	19	48		50		159	363	16	3	579
<b>Survey total</b>	<b>263,445</b>	<b>324,591</b>	<b>263,944</b>	<b>336,337</b>	<b>429,669</b>	<b>312,387</b>	<b>420,356</b>	<b>382,409</b>	<b>404,399</b>	<b>398,564</b>
<b>Industry total*</b>	<b>266,000</b>	<b>328,000</b>	<b>269,000</b>	<b>345,000</b>	<b>445,000</b>	<b>326,000</b>	<b>436,000</b>	<b>396,000</b>	<b>419,000</b>	<b>413,000</b>

\* The data shown are the results from the New Zealand Winegrowers' Annual Vintage Survey, whereas "Industry Total" represents the tonnes crushed by the total wine industry. The difference between 'Survey Total' and 'Industry Total' is data from wine companies who did not respond to the Vintage Survey. ND: No data available  
Source: New Zealand Winegrowers' Annual Vintage Surveys

## New Zealand Wine Exports by Market (2010-2019)

		2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
USA	L	26.360	32.223	39.481	43.362	48.914	53.858	61.636	72.929	72.701	76.234
	NZ\$	211.613	231.922	251.329	283.651	328.049	372.241	460.600	517.258	521.738	557.000
United Kingdom	L	47.995	52.930	57.657	47.622	51.868	59.745	58.936	74.638	74.435	82.728
	NZ\$	298.656	293.631	284.021	278.415	318.611	353.931	381.809	389.272	386.740	446.584
Australia	L	45.937	45.263	53.474	49.764	53.709	57.528	52.960	59.672	56.059	56.335
	NZ\$	327.098	337.740	380.473	373.048	380.851	362.188	361.677	371.099	366.997	367.722
Canada	L	7.143	5.705	6.509	7.272	7.703	9.583	10.612	11.388	12.776	12.412
	NZ\$	59.141	59.180	70.906	78.177	78.941	94.906	107.372	107.434	127.933	130.133
Netherlands	L	2.746	4.060	4.586	4.128	5.022	6.744	6.801	8.203	9.322	4.767
	NZ\$	21.576	27.369	26.744	26.743	33.383	41.479	44.480	45.439	50.853	28.655
China	L	1.425	1.489	2.200	2.219	1.810	1.858	2.028	2.270	2.520	2.525
	NZ\$	17.165	16.872	25.234	26.868	24.803	27.069	27.593	31.758	37.385	39.177
Ireland	L	1.816	1.844	2.158	2.052	2.212	2.512	2.888	2.986	3.448	3.020
	NZ\$	15.784	15.643	16.326	14.420	16.353	17.472	21.309	21.658	27.183	25.874
Singapore	L	1.031	1.164	1.149	1.285	1.572	1.580	1.567	1.306	1.338	1.314
	NZ\$	12.464	13.984	14.515	16.148	21.326	20.691	20.570	18.596	19.165	18.884
Hong Kong	L	0.947	1.307	1.524	1.570	1.348	1.399	1.283	1.353	1.178	1.067
	NZ\$	11.951	17.629	18.393	20.474	16.853	17.680	17.333	18.553	15.671	13.337
Japan	L	0.674	0.897	1.119	1.152	1.196	1.193	1.150	1.273	1.225	1.342
	NZ\$	9.026	11.017	12.891	13.646	13.908	13.773	13.796	14.565	14.047	15.003
Sweden	L	0.942	1.367	1.459	1.563	1.562	1.630	1.843	1.779	1.521	1.631
	NZ\$	8.747	11.365	11.554	13.090	13.020	13.163	15.276	14.208	12.903	13.250
Germany	L	0.586	0.748	1.429	1.532	2.682	2.073	2.667	1.728	1.685	8.413
	NZ\$	4.954	5.302	7.639	9.532	14.459	10.018	14.501	10.740	9.061	44.917
Denmark	L	1.013	0.976	1.004	0.790	0.864	1.191	0.942	1.252	1.322	1.362
	NZ\$	5.946	6.646	6.566	5.388	6.652	8.042	7.182	8.368	8.594	44.917
Norway	L	0.068	0.169	0.205	0.224	0.334	0.270	0.284	0.320	0.316	.550
	NZ\$	0.623	1.529	1.483	1.591	2.742	2.045	2.511	2.508	2.648	3.569
Finland	L	0.164	0.276	0.219	0.185	0.259	0.310	0.258	0.248	0.261	.314
	NZ\$	1.528	2.532	2.134	1.572	2.283	2.455	2.388	2.004	2.340	2.809
Others	L	2.010	4.243	4.706	4.942	5.834	7.947	7.516	11.618	14.979	16.351
	NZ\$	23.358	41.614	46.638	47.758	56.124	67.307	70.938	89.507	101.377	109.304
Total	L	142.032	154.661	178.880	169.669	186.889	209.419	213.371	252.962	255.093	270.364
	NZ\$	1,040.529	1,093.973	1,176.847	1,210.525	1,328.358	1,424.461	1,569.515	1,662.968	1,704.644	1,825.116

Note: All figures are in millions  
Source: Statistics New Zealand

## New Zealand Wine Exports by Market (year end June 2019)

		White 750ml	White Other	White Total	Red 750ml	Red Other	Red Total	Sparkling	Fortified	Total
USA	L	49.599	23.735	73.334	2.657	0.017	2.674	.226	.000	<b>76.234</b>
	NZ\$	421.161	101.072	522.233	33.197	0.313	33.510	1.256	.001	<b>557.000</b>
	\$/L	\$8.49	\$4.26	\$7.12	\$12.49	\$17.88	\$12.53	\$5.57	\$428.50	<b>\$7.31</b>
United Kingdom	L	34.037	44.223	78.260	3.845	.423	4.268	.200	.000	<b>82.728</b>
	NZ\$	235.633	165.513	401.146	40.875	2.625	43.501	1.937	.0001	<b>446.584</b>
	\$/L	\$6.92	\$3.74	\$5.13	\$10.63	\$6.20	\$10.19	\$9.67	\$64.00	<b>\$5.40</b>
Australia	L	32.462	18.789	51.251	4.456	.220	4.676	.408	.000	<b>56.335</b>
	NZ\$	235.867	69.975	305.842	53.948	2.478	56.426	5.452	.002	<b>367.722</b>
	\$/L	\$7.27	\$3.72	\$5.97	\$12.11	\$11.27	\$12.07	\$13.35	\$160.87	<b>\$6.53</b>
Canada	L	10.940	.297	11.237	1.149	.001	1.150	.025		<b>12.412</b>
	NZ\$	114.301	.993	115.294	14.422	.051	14.473	.366		<b>130.133</b>
	\$/L	\$10.45	\$3.34	\$10.26	\$12.55	\$44.65	\$12.58	\$14.84		<b>\$10.48</b>
Netherlands	L	2.166	2.083	4.248	.468	.001	.469	.050		<b>4.767</b>
	NZ\$	17.573	6.733	24.306	3.910	.023	3.933	.416		<b>28.655</b>
	\$/L	\$8.11	\$3.23	\$5.72	\$8.36	\$18.60	\$8.39	\$8.34		<b>\$6.01</b>
China	L	1.128	.023	1.151	1.324	.046	1.370	.003	.0001	<b>2.525</b>
	NZ\$	12.868	.229	13.097	25.228	.755	25.983	.037	.059	<b>39.177</b>
	\$/L	\$11.41	\$9.87	\$11.38	\$19.05	\$16.50	\$18.96	\$10.91	\$524.27	<b>\$15.52</b>
Ireland	L	2.247	.539	2.786	.207	.007	.215	.019		<b>3.020</b>
	NZ\$	17.977	5.233	23.211	2.348	.062	2.410	.254		<b>25.874</b>
	\$/L	\$8.00	\$9.72	\$8.33	\$11.32	\$8.48	\$11.22	\$13.07		<b>\$8.57</b>
Singapore	L	.939	.005	.944	.300	.014	.314	.057	.000	<b>1.314</b>
	NZ\$	12.722	.042	12.764	5.102	.136	5.237	.882	.001	<b>18.884</b>
	\$/L	\$13.55	\$8.39	\$13.53	\$17.00	\$9.97	\$16.70	\$15.60	\$79.63	<b>\$14.37</b>
Hong Kong	L	.865	.002	.867	.190	.003	.193	.006	.000	<b>1.067</b>
	NZ\$	9.546	.038	9.584	3.571	.073	3.645	.108	.0002	<b>13.337</b>
	\$/L	\$11.04	\$15.42	\$11.05	\$18.77	\$23.77	\$18.85	\$17.44	\$198.00	<b>\$12.50</b>
Japan	L	.802	.127	.929	.355	.001	.356	.057		<b>1.342</b>
	NZ\$	8.223	.648	8.870	5.533	.023	5.555	.577		<b>15.003</b>
	\$/L	\$10.25	\$5.10	\$9.55	\$15.59	\$18.73	\$15.60	\$10.18		<b>\$11.18</b>
Sweden	L	1.258	.072	1.329	.253	.001	.254	.048		<b>1.631</b>
	NZ\$	9.735	.331	10.067	2.611	.008	2.619	.564		<b>13.250</b>
	\$/L	\$7.74	\$4.62	\$7.57	\$10.32	\$12.23	\$10.32	\$11.77		<b>\$8.12</b>
Germany	L	2.317	5.694	8.011	.348	.00	.348	.053		<b>8.413</b>
	NZ\$	17.819	23.401	41.220	3.142	.004	3.146	.551		<b>44.917</b>
	\$/L	\$7.69	\$4.11	\$5.15	\$9.04	\$14.20	\$9.04	\$10.32		<b>\$5.34</b>
Denmark	L	.659	.527	1.186	.175		.175	.001		<b>1.362</b>
	NZ\$	4.938	2.130	7.068	1.801		1.801	.029		<b>8.898</b>
	\$/L	\$7.50	\$4.04	\$5.96	\$10.32		\$10.32	\$19.41		<b>\$6.53</b>
Norway	L	.242	.240	.482	.055		.055	.013		<b>.550</b>
	NZ\$	1.841	1.007	2.847	.575		.575	.147		<b>3.569</b>
	\$/L	\$7.60	\$4.20	\$5.91	\$10.53		\$10.53	\$11.12		<b>\$6.49</b>
Finland	L	.150		.150	.030		.030	.133		<b>.314</b>
	NZ\$	1.359		1.359	.309		.309	1.142		<b>2.809</b>
	\$/L	\$9.04		\$9.04	\$10.22		\$10.22	\$8.56		<b>\$8.95</b>
Others	L	6.728	8.331	15.058	1.090	.109	1.199	.093	.001	<b>16.351</b>
	NZ\$	61.934	30.539	92.473	14.721	.761	15.483	1.329	.019	<b>109.304</b>
	\$/L	\$9.21	\$3.67	\$6.14	\$13.51	\$6.96	\$12.91	\$14.26	\$27.92	<b>\$6.68</b>
<b>Total</b>	<b>L</b>	<b>146.537</b>	<b>104.687</b>	<b>251.224</b>	<b>16.901</b>	<b>.844</b>	<b>17.746</b>	<b>1.394</b>	<b>.001</b>	<b>270.364</b>
	<b>NZ\$</b>	<b>1,183.496</b>	<b>407.885</b>	<b>1,591.381</b>	<b>211.293</b>	<b>7.312</b>	<b>218.605</b>	<b>15.047</b>	<b>.083</b>	<b>1,825.116</b>
	<b>\$/L</b>	<b>\$8.08</b>	<b>\$3.90</b>	<b>\$6.33</b>	<b>\$12.50</b>	<b>\$8.66</b>	<b>\$12.32</b>	<b>\$10.80</b>	<b>\$99.96</b>	<b>\$6.75</b>

Note: All litre and dollar figures are in millions  
Source: Statistics New Zealand



## New Zealand Wine Exports by Variety (2010-2019)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Sauvignon Blanc	115.810	131.653	150.883	144.551	160.580	177.776	181.944	217.890	220.065	231.194
Pinot Noir	8.207	9.498	10.560	10.170	10.705	10.886	12.171	12.510	13.171	12.331
Pinot Gris	2.769	2.648	4.091	3.612	4.688	4.479	4.713	7.151	7.740	8.678
Rosé	0.559	0.622	0.586	0.490	0.712	0.835	0.942	2.389	3.656	5.195
Chardonnay	5.234	4.888	5.510	4.914	4.627	5.277	6.063	6.172	4.766	5.088
Merlot	2.618	2.347	2.379	2.059	1.765	1.711	1.906	2.250	2.060	2.769
Sparkling	1.737	1.271	1.392	1.451	1.700	1.441	1.412	1.088	1.167	1.150
Riesling	0.971	1.062	1.057	0.924	0.996	0.113	0.150	1.099	0.962	1.047
Cabernet or Merlot Blend	1.022	1.094	1.254	1.424	1.030	0.754	0.836	0.972	0.798	.810
Other White Varietals	0.069	0.076	0.118	0.103	0.127	0.282	0.341	0.453	0.420	.235
Syrah	0.227	0.307	0.309	0.270	0.242	0.954	1.065	0.283	0.375	.346
Gewürztraminer	0.162	0.306	0.202	0.192	0.212	0.017	0.026	0.182	0.150	.148
Generic White	0.991	0.532	0.719	0.266	0.043	0.384	0.380	0.085	0.120	.126
Sauvignon Blend	0.154	0.077	0.140	0.422	0.034	0.014	0.013	0.135	0.102	.018
Sparkling Sauvignon	0.000	0.000	0.217	0.360	0.107	0.175	0.183	0.059	0.101	.042
Other Red Varietals	0.060	0.087	0.095	0.085	0.068	0.041	0.048	0.128	0.064	.085
Sweet Wines	0.027	0.039	0.055	0.038	0.037	0.085	0.134	0.051	0.032	.024
Cabernet Sauvignon	0.043	0.020	0.030	0.046	0.006	0.012	0.013	0.011	0.023	.011
Chenin Blanc	0.010	0.017	0.013	0.016	0.017	0.041	0.028	0.008	0.009	.011
Chardonnay Blend	0.426	0.415	0.149	0.997	0.047	0.005	0.132	0.007	0.008	.010
Generic Red	0.068	0.022	0.021	0.043	0.002	0.170	0.087	0.126	0.013	.008
Fortified	0.011	0.001	0.001	0.001	0.004	0.002	0.011	0.001	N/A	.002
Semillon	0.001	0.008	0.002	0.003	0.008	0.009	N/A	0.051	N/A	N/A
<b>Total*</b>	<b>141.139</b>	<b>156.990</b>	<b>179.783</b>	<b>172.437</b>	<b>187.757</b>	<b>205.460</b>	<b>212.594</b>	<b>253.099</b>	<b>255.802</b>	<b>269.329</b>

\* Data will slightly differ in total volume to those obtained through Statistics New Zealand

Note: All figures are in millions of litres

Source: Wine Export Certification Service

## Wine Imports Into New Zealand (2010-2019)

By country of origin	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Australia	26.502	22.512	21.897	32.565	31.658	25.668	28.715	28.961	31.517	32.118
France	0.984	1.095	1.449	2.023	2.153	2.344	2.869	2.807	2.762	3.069
Chile	0.102	0.062	0.530	1.936	2.456	1.905	1.842	2.397	1.606	1.522
South Africa	5.860	1.710	1.694	2.579	1.732	1.373	1.086	1.492	1.370	1.405
Italy	1.067	0.995	0.858	0.865	0.94	1.023	1.308	1.381	1.786	1.870
Spain	0.207	0.230	0.311	0.430	0.518	0.641	0.578	0.716	.557	.654
Argentina	0.053	0.051	0.082	0.112	0.161	0.229	0.212	0.223	.265	.917
Others	0.283	0.631	0.511	0.382	1.106	1.307	0.603	1.958	1.017	.911
<b>Total</b>	<b>35.059</b>	<b>27.287</b>	<b>27.331</b>	<b>40.892</b>	<b>40.724</b>	<b>34.490</b>	<b>37.212</b>	<b>39.935</b>	<b>40.881</b>	<b>42.466</b>

By product type	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
White	13.773	8.005	7.555	16.76	17.28	11.217	14.088	18.206	21.525	21.237
Red	18.475	16.012	17.011	20.958	20.541	19.830	19.070	17.579	15.036	16.281
Sparkling	2.376	2.760	2.008	2.962	1.849	2.268	2.632	2.651	2.905	3.317
Champagne	0.381	0.447	0.679	0.883	0.896	1.049	1.315	1.397	1.371	1.567
Fortified	0.054	0.063	0.078	0.0211	0.158	0.126	0.058	0.076	0.044	0.64
<b>Total</b>	<b>35.059</b>	<b>27.287</b>	<b>27.331</b>	<b>40.892</b>	<b>40.724</b>	<b>34.490</b>	<b>37.212</b>	<b>39.909</b>	<b>40.881</b>	<b>42.466</b>

Note: All figures are in millions of litres

Country of Origin		White	Red	Sparkling	Champagne	Fortified	Total
Australia	L	18.566	11.523	2.008		.020	<b>32.118</b>
	\$	35.323	62.916	10.170		1.003	<b>109.412</b>
France	L	.264	1.136	.102	1.567	.0005	<b>3.069</b>
	\$	3.905	14.168	.796	46.924	.062	<b>65.857</b>
Chile	L	.837	.685	.0001		.000	<b>1.522</b>
	\$	1.469	1.774	.001		.000	<b>3.245</b>
South Africa	L	.516	.878	.011		.0003	<b>1.405</b>
	\$	1.116	1.839	.093		.008	<b>3.056</b>
Italy	L	.103	.825	.940		.001	<b>1.870</b>
	\$	.931	5.633	7.763		.074	<b>14.400</b>
Spain	L	.043	.496	.110		.005	<b>.654</b>
	\$	.271	3.00	.766		.378	<b>4.416</b>
Argentina	L	.607	.310	.0005			<b>.917</b>
	\$	.649	1.999	.014			<b>2.662</b>
Others	L	.302	.427	.145		.037	<b>.911</b>
	\$	2.877	3.758	1.038		2.500	<b>10.173</b>
<b>Total</b>	<b>L</b>	<b>21.237</b>	<b>16.281</b>	<b>3.317</b>	<b>1.567</b>	<b>.064</b>	<b>42.466</b>
	<b>\$</b>	<b>46.541</b>	<b>95.088</b>	<b>20.643</b>	<b>46.924</b>	<b>4.024</b>	<b>213.220</b>

Note: All figures are in millions

Source: Statistics New Zealand

# 09

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1995 **Ross Goodin, ONZM, QM**

2000 **Kevyn Moore, QSM**

2004 **Jim Hamilton**

2005 **Willie Crosse**

### Industry Organisations

#### New Zealand Society of Viticulture & Oenology

c/o New Zealand Winegrowers  
President, **Jeff Sinnott**



## Regional Winegrowing Associations

### Hawke's Bay Winegrowers Association Inc

**Maxime Cavey** (Marketing and Communications)  
maxime@hawkesbaywines.co.nz

**Adele Fitzgerald** (Administrator)  
adele@hawkesbaywines.co.nz  
  
www.hawkesbaywine.co.nz

### Marlborough Winegrowers Association Inc & Wine Marlborough Ltd

**Marcus Pickens** (General Manager)  
marcus@winemarlborough.nz  
  
www.winemarlborough.co.nz

### Nelson Winegrowers Association Inc & Wine Nelson

**Jessie Creedmore**  
marketing@winenelson.co.nz

**Jane Doherty** (Admin)  
info@winenelson.co.nz  
  
www.winenelson.co.nz

### Wairarapa Winegrowers Association & Wellington Wine Country

**Tania DeJonge** (Secretary/Treasurer)  
info@wellingtonwinecountry.co.nz  
info@wairapawinegrowers.co.nz  
  
www.wairapawinegrowers.co.nz

### North Canterbury Winegrowers

**Alexandra Thompson** (Secretary)  
admin@northcanterburywines.co.nz  
  
www.northcanterburywines.co.nz

### Central Otago Winegrowers Association

**Nick Paulin** (Chairperson)  
nick@ainzfinewine.com

**Natalie Wilson** (Membership Services)  
info@cowa.org.nz  
  
www.cowa.org.nz

### Gisborne Wine Growers Society Inc

**Annie Millton** (Chair)  
annie@millton.co.nz

**Brent Laidlaw** (Administrator)  
blaidlaw@kinect.co.nz  
  
www.gisbornewine.co.nz

### Northern Winegrowers & Grapevine Improvement Association Inc

**Stephen Nobilo**  
nwgvig@xtra.co.nz or  
stephen@waimariwines.co.nz

## Sub-Region Winegrowing Associations

### Waiheke Island Winegrowers Association

**Jenny Holmes** (Marketing Manager)  
jenny@waihekewine.co.nz

### West Auckland WineGrowers

**Michael Brajkovich** MW  
michael@kumeuriver.co.nz  
  
www.kumeuriver.co.nz

### Central Otago Pinot Noir Ltd

**Tania Partridge** (Marketing and Events)  
events@centralotagopinot.co.nz  
  
www.centralotagopinot.co.nz

### Matakana Winegrowers Inc

**Richard Robson** (President)  
matakanawinegrowers@gmail.com  
  
www.matakanawine.co.nz

### Northland Winegrowers Association

**Glenda Neil** (Secretary)  
admin@northlandwinegrowers.co.nz  
  
www.northlandwinegrowers.co.nz

### Waitaki Valley Winegrowers Association

**Andrew Ballantyne** (Chair)  
ohaumagic@yahoo.com

## Key Contacts

### New Zealand Winegrowers Inc.

PO Box 90276  
Victoria Street West  
Auckland 1142

Level 3  
52 Symonds Street  
Grafton  
Auckland 1010

Ph +64 9 303 3527  
info@nzwine.com  
www.nzwine.com



#### Chief Executive Officer

Philip Gregan  
+64 9 306 5555  
philip@nzwine.com



#### Communications Manager

Amber Silvester  
+64 9 306 5553  
amber.silvester@nzwine.com



#### External Relations Manager

Nicola Crennan  
+64 4 385 0200  
nicola@nzwine.com



#### General Manager Advocacy & General Counsel

Jeffrey Clarke  
+64 21 477 428  
jeffrey@nzwine.com



#### Business Manager — Sustainable Winegrowing NZ

Justine Tate  
+64 3 577 2379  
justine.tate@swnz.org.nz



#### Financial Accountant

Suzanne Hill  
+64 9 306 5554  
suzanne@nzwine.com



#### CEO — Bragato Research Institute

MJ Loza  
+64 21 993 389  
mj.loza@bri.co.nz



#### Biosecurity Manager

Dr. Edwin Massey  
+64 3 264 4057  
edwin.massey@nzwine.com



#### Global Events Manager

Angela Willis  
+64 9 306 5642  
angela@nzwine.com





IN JANUARY 2019 NZ WINEGROWERS,  
GISBORNE WINEGROWERS AND LOCAL  
IWI HOSTED THE FIRST EVENING OF THE  
CHARDONNAY AND SPARKLING SYMPOSIUM  
AT THE WHAKATO MARAE MANUTUKE.  
ATTENDED BY OVER 60 INTERNATIONAL  
TRADE AND MEDIA GUESTS, THIS WAS A  
UNIQUE AND SPECIAL CULTURAL  
EXPERIENCE FOR ALL INVOLVED.