



NEW ZEALAND WINE
PURE DISCOVERY

2021

NEW ZEALAND WINEGROWERS INC

Annual Report



CORTEVA YOUNG VITICULTURIST COMPETITION, GOLDIE ESTATE, WAIHEKE. PHOTO: AMBER SOLJAN

Vision

Around the world, New Zealand is renowned for its 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, and environment.

2021

NEW ZEALAND WINEGROWERS INC

Annual Report

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Chair's Report

Ten years ago, the New Zealand wine industry set out to double the value of our wine exports to \$2 billion per year. This ambition reflected industry confidence that the distinctive flavours, quality and sustainability of our wines would increasingly resonate with consumers around the world.

A decade on, we have realised that bold objective. Exports reached \$2.01 billion for the year ending December 2020. Our ability to compete with distinction, in markets at home and throughout the world, has been affirmed year after year.

This sustained growth has never been without challenge. In the past year, the effects of COVID-19 on the border, markets, and increasingly supply chains, have continued to impact growers and wineries.

Now, for many in the industry, those challenges have been compounded by a vintage that is of exceptional quality, but much reduced in volume. Successfully managing the market impacts of the resulting supply constraints in a post-pandemic world will be a key focus for our industry.

IMPACTS OF COVID-19

Restrictions on operations of hospitality businesses worldwide have been a major stress point for wineries dependent on that sector. With countries bouncing in and out of lockdown, it is hard to predict buying patterns and, indeed whether some trade customers will survive at all.

Cellar doors have also been hit hard by the collapse in international tourist numbers. Positively, we have seen more New Zealanders visiting cellar doors, but there have been long, lean periods outside of traditional Kiwi holiday periods and long weekends. The tourism bubble with Australia provided hope for operators, but its potential benefits have been hindered by its on-again-off-again status.

Internationally, New Zealand wineries' partnerships with supermarkets and big retailers strengthened. With operations of other outlets restricted or closed, consumers turned to trusted brands on the retail shelves. New Zealand wine benefited from this trend. Exports lifted sharply in the six months to December 2020, up 9% in value and 15% in volume for the period.

As the year progressed, wineries' ability to ship products to market became a matter of concern. Transport costs more than doubled

and shipping reliability plunged. Wineries now report that orders are being lost because of supply chain issues. This is an unprecedented situation, with no near-term solution.

VINTAGE 2021

Each year our growers and wineries look forward to vintage with enthusiasm and expectation. In terms of quality, Vintage 2021 delivered—emphatically so, in fact. The critical post-veraison ripening period was marked by near-perfect weather throughout the country. Vintage 2021 wines will bear testimony to these ideal conditions and enhance our international reputation for high-quality wines.

However, harvest volumes from regions in the centre of the country were hit by inclement weather in spring, which markedly reduced the crop volume. In Central Otago and Waitaki Valley, by contrast, production rose from the previous year. Overall production in 2021 was 19% down on the previous year. Grower returns in affected areas were hit, despite some rise in grape prices. For many wineries, with stocks already low from strong demand, this means a challenging year ahead to meet the demands of trade customers, retailers and consumers.

The impact of the small vintage is already being felt. Export volumes, after lifting 15% in the six months to December 2020, fell 16% in the six months to June 2021. At year-end, export value was down 3% to \$1.87 billion, the first fall in export value in 26 years. The total export value will likely fall further in the year ahead as we estimate the industry is short by up to seven million nine-litre cases of wine.

The shortage will generate strong competition for grapes and wine going into next vintage. This would lift incomes for growers but push costs higher for wineries, compounding the challenges they are facing. Wineries likely will need to review their cost and price structures as a result.

OVERCOMING LABOUR CHALLENGES

In the past 12 months, an overriding concern for many growers and wineries has been the

availability of overseas workers. These workers play a vital role in enabling the industry to meet the critical seasonal work peaks. If those peaks, particularly pruning and harvest, are not met this would put in jeopardy the jobs of the 21,000 Kiwis who work in and supply our sector.

The availability of workers is a major focus for New Zealand Winegrowers (NZW). We have worked closely with the Ministry for Primary Industries (MPI) and other government departments to secure New Zealand workers to fill the roles left by Recognised Seasonal Employer (RSE) and other overseas workers. However, the vacancies we are facing cannot be filled by Kiwis alone, given the tight employment market in many of our regions, and the immobility of much of the labour market in New Zealand.

“Reaching the milestone of \$2 billion in wine exports demonstrates that the unique flavours, quality and sustainability of our wines resonate with consumers across the globe.”

Working closely with the horticulture sector, contractors and government, we secured preferred access for two cohorts each of 2,000 RSE workers through managed isolation and quarantine (MIQ). Changes have also been made to visas to make them more flexible and give certainty to the individuals concerned. The recent government announcement that RSE workers from Samoa, Tonga and Vanuatu will no longer be required to go through MIQ is also a significant win.

These successes are positive. However, with some borders restrictions still in place, the labour outlook for the year ahead persists as a major concern for producers. NZW continues to work hard in this area to try and ensure the workforce is available to meet our seasonal peaks over the next year and beyond. ►



FIT FOR A BETTER WORLD

Research has long been an important tool informing business decisions by growers and wineries, from canopy management in the 1980s, through to recently concluded ground-breaking investigations into the production and marketing of lighter wines. The willingness to learn and innovate in our sector was evident again this year, with a record attendance of more than 900 members and employees at the June 2021 Grape Days.

With funding from the Ministry of Business, Innovation & Employment (MBIE) we have built a world-class facility and research capability at the Bragato Research Institute (BRI) in Marlborough. Negotiations for additional funding for BRI over the next two years are well advanced with MBIE. In addition, we are in the contracting stage with MPI for a new vine improvement programme that aims to build resilience for our vines in terms of climate change and pest and disease. This project has garnered strong support from industry members, and as with other initiatives, aligns strongly with the MPI *Fit for a Better World* vision and strategy.

Building a sustainable financial and research future for BRI will help maximise the long-term contribution of BRI to the success of the industry. Success in doing this will add further to the industry's reputation as being at the forefront of global wine industry innovation.

MADE WITH CARE

Positive international perceptions of New Zealand have been reinforced by extensive global media coverage of the nation's response



NAUTILUS ESTATE. PHOTO: RICHARD BRIGGS

to COVID-19. To capitalise on this opportunity, we have leveraged off the New Zealand Trade and Enterprise Made with Care digital campaign in our major export markets. This campaign sought to drive preference and awareness for premium New Zealand food and beverage products. In addition, the campaign has provided a valuable platform to businesses constrained in their ability to promote their products, due to border closures and other restrictions.

The Made with Care initiative has been a natural fit for our producers, given our strong environmental credentials. We know that how we produce our products is important to our markets and our consumers.

Our world-leading sustainability programme, Sustainable Winegrowing New Zealand (SWNZ), has been running for 25 years, and we are seeing increasing industry support for organics and

biodynamics, as well as a growing interest in regenerative agriculture. This year we launched new SWNZ questionnaires targeted at our focus areas, including water, climate change and waste, while we have continued our support of Organic Winegrowers New Zealand.

There is a strong alignment between the industry's sustainability activities and the government's agenda for climate change, water and farm environment plans. We believe SWNZ should be the primary vehicle to demonstrate our producers' compliance with these environmental regulatory requirements and we will continue to advocate strongly for this.

Accepting SWNZ as the equivalent of a freshwater farm plan will foster industry compliance with the desired environmental outcomes, while easing the compliance burden for growers and wineries. We see this as a win for the environment, a win for the industry and a win for regulators.

BUILDING INSIGHT AND CULTIVATING OUR COMMUNITY

A key focus of NZW is delivering timely and relevant information to our members. In times of uncertainty, especially when in-person engagement is limited, the role of information becomes even more critical.

Our marketing function has completely refocused in the face of COVID-19. We have shifted from delivery in-market to providing insights and intel to members. Our overseas-based staff have been key in this, providing in-market views at a time when many industry members cannot travel.

Support for webinars has been strong, as was reflected in the 2021 Member Survey. Member ratings were up across the board compared with the 2019 survey, indicating NZW is well connected with members and is cognisant of their needs.

With continuing COVID-19 restrictions and uncertainty, the provision of information to members will remain a priority. In addition to

annual events such as Grape Days and Spray Days, we will hold a Wine Business Forum in November to update members on the latest market developments and insights.

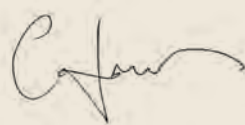
In the year ahead we believe personal contact is going to be increasingly important. As well as reaching out more proactively to the regions, we are supporting The Whole Bunch Pinot Noir event in September, and planning to organise an industry celebration alongside the Wine Business Forum.

These events will sit alongside a suite of other community and leadership-focused initiatives that we undertake each year. The Corteva Young Viticulturist of the Year and Tonnellerie de Mercurey Young Winemaker of the Year competitions, Women in Wine, and other mentoring programmes are all aimed at building a diverse, future-focused and empowered workforce.

OUR MEMBERS, OUR FUTURE

Our members—the grape growers and wineries of New Zealand—have built the success of this industry. Reaching the milestone of \$2 billion in wine exports demonstrates that the unique flavours, quality and sustainability of our wines resonate with consumers across the globe.

Success in the future will rely on the same principles of the past; producing distinctive and premium wines that meet the values and expectations of our customers. As we look forward, commitment to our people, our culture and our place will become an even more important component of our sustainability story. By doing so we can be confident of a future that will deliver even more value to our communities and our country. ■

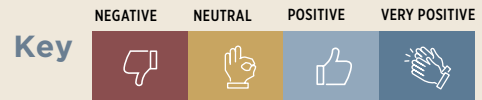


Clive Jones (Chair)



Fabian Yukich (Deputy Chair)

Member Survey results summary 2021



2021 Outlook

What is the **outlook for your business** for the next 12 months?



Overall satisfaction with **NZW performance** during the last 12 months?



Overall satisfaction with **NZW responsiveness** to queries/requests when contacted?

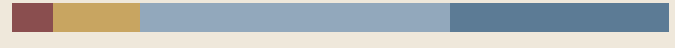


Importance of NZW activities to your business?

Advocacy



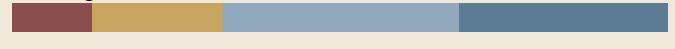
Research



Sustainability

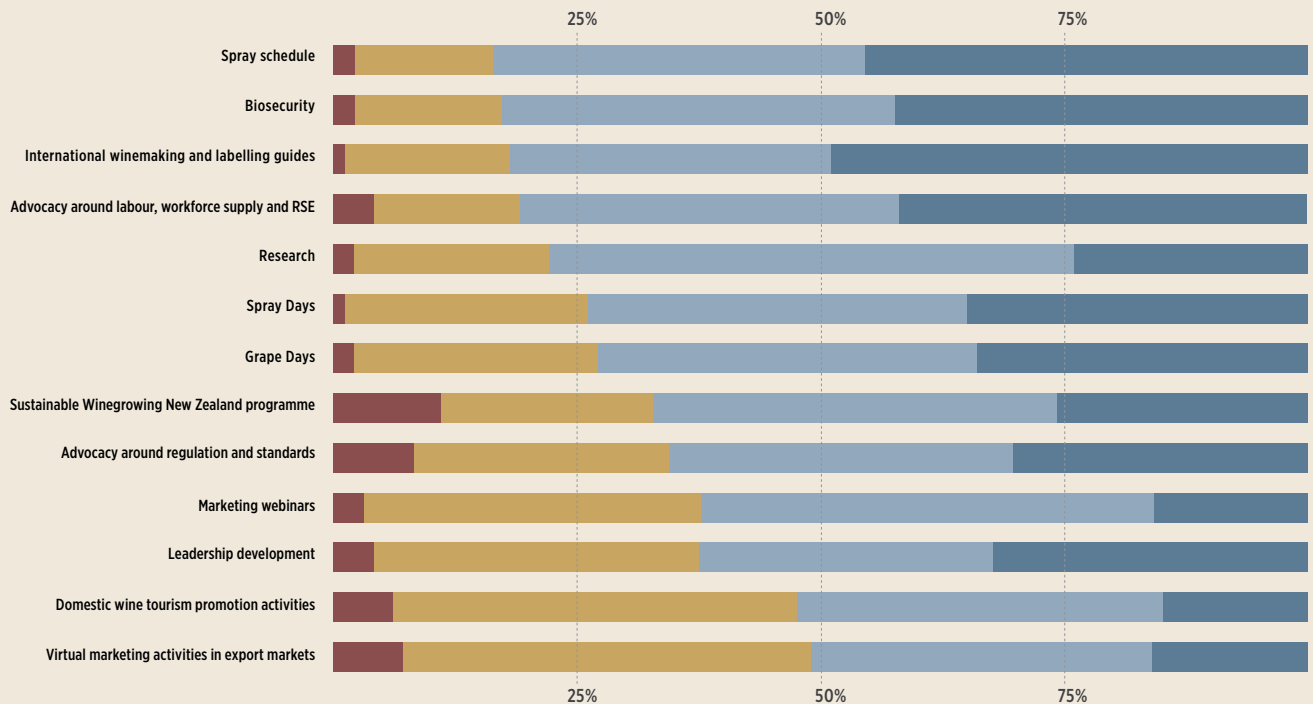


Marketing



Satisfaction with **NZW delivery of activities** that your business is aware of or has used?

New Zealand Winegrowers Deliverables



Satisfaction with how **NZW performed in these areas** during COVID-19?

Government advocacy to achieve 'essential service' status



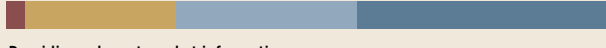
Providing practical guidelines for operating safely



Increased communication



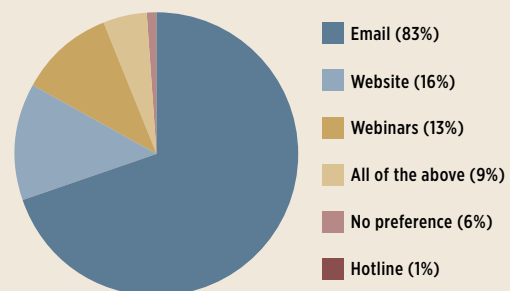
Responsiveness to member queries



Providing relevant market information



On the topic of COVID-19, **preferred mode of communication from NZW?**



Advocacy

Identifying what's required for New Zealand's winegrowers to produce, market and sell competitively, and then providing the support tools and advocacy to make that change a reality.



NAUTILUS ESTATE. PHOTO: RICHARD BRIGGS

WORKFORCE ACTIVITIES

Over the past 12 months our members have had to make business decisions in conditions of ongoing uncertainty. Our role has been to provide up-to-date information to inform decision-making, and to advocate for changes to immigration and the Recognised Seasonal Employer (RSE) scheme that were creating blockages.

We are an active member of the RSE Industry Chief Executives Group, and this group was successful in reinstating the entry of RSE workers from the Pacific. We continue to work closely alongside the horticulture sector and the government, to ensure we have the offshore labour we need to meet our critical seasonal work peaks. The recent government announcement that RSE workers from Samoa, Tonga and Vanuatu will have quarantine-free travel to New Zealand was a very welcome and positive development for our Vintage 22 workforce.

We have also increased our support for attracting New Zealanders to the industry. This included creating career pathways resources to demonstrate the range of roles and progression into other pathways, illustrated with real people in the industry. The second phase will involve developing further resources for teachers to help

them advise their students about the options available in viticulture and wine.

To shape an industry workforce strategy, NZW has commissioned PricewaterhouseCoopers to provide a strategic issues paper on the increasing workforce shortages and potential solutions. The report will be used to engage with our regional associations, local and central government to explore potential options to manage seasonal labour issues across the short and medium term. We will continue working with regions and members to share the key issues and take action on the best solutions.

POTENTIAL FREE TRADE AGREEMENTS ON THE HORIZON

New Zealand continues its negotiations for a free trade agreement with both the EU and the UK. NZW is regularly engaging with government to advocate for winegrowers' interests and to ensure that matters specific to industry are adequately addressed in any eventual agreement.

We appreciate those members who have supported us by providing information and case studies for our discussions with officials — these help us to paint a picture of how an agreement would work for winegrowers. ►

ENGAGING WITH GOVERNMENT ON EXCISE

The Minister of Customs, Hon Meka Whaitiri, decided to raise excise again from 1 July 2021. NZW is disappointed in this decision, and we continue to engage with government on issues related to excise.

Over the past year, our members have worked hard to operate in uncertain times, to keep their workers in jobs, and continue to contribute to the economic recovery of their regions and communities. While our members appreciated the set of relief measures made available by Customs to defer excise payments, they were still faced with making these payments in full over time.

CELLAR DOOR LICENSING CHALLENGES CONTINUE, BUT WATCH THIS SPACE

Since 2018, NZW has been working steadily with officials to seek improvements to the Sale and Supply of Alcohol Act that would support

wine tourism, such as by allowing cellar doors with an off-licence to charge for tastings.

While government has not yet progressed a promised review of the wider legislation, Stuart Smith MP has introduced a private members' bill that (if passed) we expect would largely address members' concerns.

Kieran McAnulty MP has also introduced a private members' bill that would remove the additional restrictions on selling alcohol at Easter and Christmas, and offer additional flexibility to any winegrowers wishing to operate on those days.

We look forward to engaging with the parliamentary process on any bills that may be introduced in this space, whether they are government or private members' bills.



YOUNG VITS, ESCARPMENT, WAIRARAPA. PHOTO: PETE MONK

Leadership and communities

We were fortunate to be able to run our Young Viticulturist of the Year and Young Winemaker of the Year programmes in 2020, albeit later than originally planned. These events gave contestants the opportunity to refocus on their self-development and career progression.

The Corteva Young Viticulturist of the Year 2020 was Rhys Hall from Indevin and the Tonnellerie de Mercurey Young Winemaker of the Year 2020 was Ben Tombs from Peregrine.

A special Young Viticulturist conference and dinner also took place in October 2020, celebrating 15 years of the competition. It brought together the whole 'Young Vit' community, including all previous winners, to celebrate how far the competition has come and to discuss what lies ahead for the industry. The 2021 Young Viticulturist programme is now well underway, with the 2021 Young Winemaker programme scheduled to start in September.

We continue to run the Women in Wine Mentoring Programme and the NZW Mentoring Programme, with the Young Leaders' Forum returning this year after a break in 2020. And for the first time, Go You! Workshops were held around the country pre and post vintage, providing tips and resources on mental well-being and goal setting. ■

Summary of submissions

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

International

UK-NZ FTA, UK House of Lords (International Agreements Sub-committee)

September 2020

Possible New Geographical Indications Right in Australia, IP Australia

December 2020

Draft Action Plan on Delivery of Global Alcohol Strategy, World Health Organization (joint submission with Brewers Association and Spirits NZ)

December 2020

Domestic

Safely Managing Fuel on Farms, WorkSafe

October 2020

FSANZ Act review, Food Standards Australia New Zealand

November 2020

Aspirations for the Food Regulatory System, Food Regulation Standing Committee

January 2021

Update of NZS8409: Management of Agrichemicals, Standards New Zealand

January 2021

Water Services Bill, Health Select Committee (joint submission with Brewers Association and Spirits NZ)

March 2021

Recognising Variability in Charging for Animal Products and Wine Approvals Consultation, New Zealand Food Safety

March 2021

Draft Advice for Consultation, Climate Change Commission

March 2021

Future Membership of the CPTPP, Ministry of Foreign Affairs and Trade

April 2021

FSANZ Act review, Food Standards Australia New Zealand

May 2021

Targeted Update of Agriculture Sector Occupations in ANZSCO, Department of Agriculture, Water and the Environment, Australian Bureau of Statistics

June 2021

Proposals for regulating organic businesses in the primary sector, Ministry for Primary Industries

June 2021 ■



YOUNG WINEMAKER 2020. PHOTO: RICHARD BRIGGS

Research

The vision of Bragato Research Institute's (BRI) vision is to transform the New Zealand grape and wine industry through research, innovation and extension.



BRAGATO RESEARCH INSTITUTE

As the NZW research arm, BRI focusses its research on the short- and long-term priority areas identified by our members, and then drives industry uptake of research outcomes.

In its initial three years of operation, BRI has established strong governance and management, put in place effective systems and infrastructure, and attracted top science capability. BRI's national Research Winery in Blenheim (a facility unique in the Southern Hemisphere) opened just before the first COVID-19 lockdown, and provides new capability to deliver impact and science excellence to members.

CLEAR VALUE PROPOSITION

Bragato Research Institute was created in June 2017, with \$12.5 million establishment funding from MBIE, and began operations in 2018. MBIE's November 2020 review of BRI assessed the value of wine industry research to New Zealand, including BRI's ability to realise this. The review found:

"There is a clear value proposition for BRI, centred on the provision of specialist viticultural research, combined with a state-of-the-art Research Winery. Bragato fills a gap not supplied by other research organisations, providing immediate technical support for the industry to grow and thrive."

Research is expensive. To leverage members' levy funds, BRI also seeks contestable funding from government and other funders, co-funding from individual members, and collaborates with other research organisations. This has enabled BRI to invest a total of \$15.4 million into research over the past three years, compared to levy funding of \$6.6 million. Developments include:

- » a successful COVID-19 response fund application for processing grape marc into hand sanitiser
- » the upcoming announcement and launch of our largest ever research programme—with significant government co-funding
- » other sizeable applications, including to the Ministry for Primary Industries' (MPI) Sustainable Food and Fibre Futures fund.

Collaborations this year included a Manaaki Whenua project looking at wine and climate change, and a regenerative agriculture project with Beef+Lamb NZ.

BRI is also developing its income from a range of commercial services to industry. In addition to commercial Research Winery trials, these include a new soil health consulting service, a fit-for-purpose wine sensory evaluation service, as well as genomic analysis which provides an efficient



and cost-effective service to identify mystery wine varieties.

In July 2021, BRI saw a change in leadership, with Jeffrey Clarke (formerly NZW General Manager Advocacy & General Counsel) being appointed as CEO.

RESEARCH WINERY

Vintage 2021 was the second year of operation for the Research Winery, and it was busy with research projects and commercial clients, proving that it is fulfilling a previously unmet need. The Research Winery fermented 186 different wines in Vintage 2021, up from 67 in 2020.

The ferments provided winemakers with cost-effectively produced trial wines made under tightly controlled conditions. The feedback from commercial customers has been positive, and wineries value the certainty of knowing (during the pressure of vintage) that BRI's winemakers are focussing exclusively on their trials. The Research Winery has also attracted substantial support from the wider industry, with cash sponsorships by Hill Laboratories, Fermentis, and WineWorks all signed this year.

TAKING THE SCIENCE TO MEMBERS

A selection of New Zealand's most exciting wine research was presented at this year's NZW Grape Days events, with a record 926 members attending throughout the country.

"The Research Winery fermented 186 different wines in Vintage 2021, up from 67 in 2020."

Grape Days aim to share relevant outputs of industry-funded research. In 2021 there was a strong focus on the seven-year, \$7 million Vineyard Ecosystems Programme, which is drawing to a close in the field.

During the past year the BRI extension team has also been established. The team's key role is to communicate research to members, ensuring information and tools delivered by research programmes are being adopted and applied to deliver benefits to industry. ►



The industry's three major levy-funded programmes

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 concluded 30 June 2021.

Total Funding: \$18.83m comprising \$10.58m from participating companies and industry levies and \$8.25m from MPI's Primary Growth Partnership (PGP).

Research: This seven-year programme has helped position New Zealand as the leading producer of lower-alcohol wines. These wines represent a new product category, one that has been pioneered and championed by the programme and the participating wine companies, with our wineries offering more than 45 products in the no-, low-, and lower-alcohol category. Based on current trends and the share of lighter wines in the domestic market, the production of these wines is predicted to grow and be 10% of export sales by 2030.

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 2022 (after obtaining a one-year extension with no additional funding, to enable COVID-19-incurred delays in research and programme communications and extension to be delivered in full).

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

Research: The Vineyard Ecosystems Programme examines how vineyard management activities can enhance biodiversity and improve grapevine performance. Work now focuses on the Bayesian network modelling (complex statistical modelling and analysis) needed to verify trends and indicate cause and effect, with significant traction being made in this area.

Applied research areas are also being summarised for industry uptake, including reduced herbicide applications for weed management, providing alternative habitats for mealybug control, and pruning wound protection against grapevine trunk disease.

PINOT NOIR PROGRAMME: QUALITY AND PRODUCTIVITY, DIVERSIFICATION

Objective: Growing returns through tools enabling high-quality Pinot Noir production at higher yields. The programme began in 2017 and runs until September 2022.

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

Research: The programme is nearing the end of its fourth year, with good progress being made in the research fields of sensory perception, chemistry and viticultural and winemaking techniques. The expansion of the programme to include two projects to examine the effect of macromolecules (polysaccharides) and their content in wine, as well as further understanding of green/herbaceous sensorial perception and implications for product acceptance, has produced results, with publication of findings. ■

To find out more about the 2020/2021 BRI Research Projects visit www.bri.co.nz/current-research.



BRAGATO RESEARCH INSTITUTE

Sustainability

Sustainability has been an integral part of the New Zealand wine industry for well over 20 years.

Over 96% of New Zealand's vineyard area is certified by Sustainable Winegrowing New Zealand.

For the New Zealand wine industry, sustainability means growing, making and sharing our wine in a way that doesn't cost the earth. Sustainability credentials now play an important role in the perception of premium products. Goods that are produced with respect for the natural world, and for the people throughout the value chain, are seen as more desirable to modern, informed consumers. Our focus on sustainability will continue to position the industry to respond effectively to these shifts, as well as our government's ambitious regulatory reform agenda.

ENHANCING OUR COMMITMENT TO SUSTAINABILITY

Sustainable Winegrowing New Zealand (SWNZ) is widely recognised as a world-leading sustainability programme and has been in place since 1995. But our commitment to sustainability means we are constantly evaluating how we can improve our actions and enhance our efforts.

The past 12 months have focused on the first stage of a long-term project to future-proof SWNZ and ensure its relevance for members. In December 2020, new SWNZ questionnaires were released online, which are better aligned with our six key focus areas and their corresponding sustainability goals. Our key focus areas and goals encapsulate specific aspects of sustainability that are most relevant for our industry, our people, our stakeholders and our markets. These updates



RAPAURA SPRINGS, BLIND RIVER VINEYARD PHOTO: RICHARD BRIGGS

will result in an increased focus on quantitative reporting, and are critical to ensure SWNZ remains a world-leading certification programme with robust data collection.

SWNZ will become increasingly important to help members minimise transaction costs as government implements its regulatory reform agenda. During 2020/21, NZW has worked with a range of regional councils to help position SWNZ as an equivalent vehicle to achieve farm-planning objectives. These objectives are likely to help shape the future direction of the SWNZ programme.

GROWING FOCUS ON THE IMPACT OF CLIMATE CHANGE

Climate change has rapidly become the most talked about focus area of sustainability, with the wine industry setting the goal of being carbon neutral by 2050 in line with government's regulatory deadline. For the first time, a specific section on climate change was included in the new SWNZ questionnaire for both vineyards and wineries. The data collected through this reporting will help to build a greater understanding of the industry's greenhouse gas ►



MISHA'S VINEYARD

“If I had to pick one wine country that was greener than others it would be New Zealand, where many producers follow a ‘reduce, reuse, recycle’ mantra.”

JANE MACQUITTY, THE TIMES UK

emissions and help to inform how members can mitigate their impact on climate change.

During the past year, NZW released two baseline research reports conducted by Toitū Envirocare. The first report highlights the industry’s greenhouse gas emissions footprint, which, while significant, is relatively small compared to a range of other prominent primary sector industries. As one of the lowest emitting industries within the horticultural sector, we are well placed to contribute positively toward achieving the country’s climate change goals. The second report highlights a range of pragmatic mitigation options in the winery and vineyard to reduce our climate impact.

These reports, combined with the climate change data collected through SWNZ, will enable us to

benchmark where we are now so that we can chart a better path to achieving our 2050 goal.

NZW has taken active steps to contribute to this goal being achieved. The 2020/21 year marked the first time the organisation has been certified under the Toitū Envirocare carbonreduce programme. As part of this programme, NZW has set a three-year target of reducing its emissions by 10% from our baseline year, 2018/19, and developing its strategy to meet longer-term reduction targets.

SUSTAINABILITY GUARDIANS

The Sustainability Guardians programme aims to promote sustainability innovation and problem solving through peer-to-peer learning. Over the last year, highlights included the development of guidance on the storage and disposal of treated timber vineyard posts, regular meetings of the waste working group, and webinars promoting climate change mitigation and biosecurity best practice. More is planned over the next year as we strive to encourage continuous improvement in our members’ sustainability journeys.

ORGANIC WINE: FROM STRENGTH TO STRENGTH

The New Zealand organic wine sector is showing impressive growth—a reflection of both international demand and increasing industry awareness around the benefits of organic practices.

A new report* released in early 2021 from Organics Aotearoa New Zealand (OANZ), shows a strong increase in organic wine production. From 2017 to 2020, the export value of New Zealand organic wine grew 40% to reach a total of \$65 million.

Domestic sales of certified organic wine also continue to grow, posting an increase of 33% in total sales value from 2017 to 2020.

The conversion of vineyards to organic production is ongoing. In the three years from 2017 to 2020, certified organic vineyard area grew by approximately 33%, reaching a total

**New Zealand Organic Market Report 2020/21*

of over 2,200 hectares. Currently, more than 10% of all New Zealand wineries hold organic certification. This includes some wineries which produce both organic and non-organic wines.

The organisation's popular annual Organic Wine Week grew to new heights of participation in the digital world this year, featuring online international organic wine seminars and tastings, as well as in-person events across New Zealand. The year also saw new educational initiatives for OWINZ, including webinars, regional pruning workshops, field days on organic conversion and a series of Visual Soil Assessment workshops co-sponsored by the Bragato Research Institute.

Organic Winegrowers New Zealand now has over 200 members from across the wine industry. For more information visit [organicwinenz.com](https://www.organicwinenz.com).

CLIMATE CHANGE

New Zealand wine industry is carbon neutral by 2050



PEST AND DISEASE

Understand, reduce and mitigate impacts of existing and potential pest and disease



PEOPLE

Be an industry of choice for workers



Sustainability goals

SOIL

Protect and enhance soil health



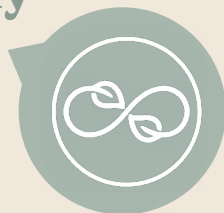
WATER

Be a world leader in efficient water use and the protection of water quality



WASTE

New Zealand wine industry achieves zero waste to landfill by 2050



BIOSECURITY: EDUCATE AND ENGAGE

This year our biosecurity activities focussed on the 'participation' aspect of the NZW Biosecurity Strategy—assisting members to plan and implement biosecurity best practice in vineyards.

The team produced a wide range of new guidance material, including:

- » a new version of the Grafted Grapevine Standard (V4)
- » best practice guidelines
- » a biosecurity plan template
- » a vineyard pest and disease identification guide
- » webinars as part of the Sustainability Guardians programme and NZW's annual Biosecurity Week.

Government-facing work has been another key priority. Two new operational agreements have been signed by the NZW Board under the Government-Industry Agreement (GIA):

- » an operational response plan for an incursion of *Xylella fastidiosa* (largely complete)
- » the Plant Pass biosecurity scheme to ensure better biosecurity practices across the nursery industry.

These agreements help ensure readiness for our most unwanted pests. Further operational agreements are under development and should be ready in the next year.

Additionally, the Biosecurity team made the following submissions over the last 12 months:

- » proposed amendments to the Vehicles, Machinery and Parts Import Health Standard (June 2021)
- » harmonisation of measures for *Drosophila suzukii* across table grape pathways (July 2020)
- » proposed changes to the Import Health Standards for Vehicles, Machinery and Parts, and Sea Containers from all countries. (July 2020). ■

Marketing

Although international borders remain largely closed, the awareness and perception of 'Brand New Zealand' has never been stronger, and our premium wine story of sustainably produced and diverse wines resonates more powerfully now than ever.

2021 has been about identifying new ways to keep New Zealand wine top of mind. We continue to enhance and evolve how we take our New Zealand wine story to the world, while also investing time to understand the rapidly changing global market dynamics and sharing this intel with our members. Creating platforms for our members to make global connections has remained an important part of our role and we look forward to when it is feasible to return to face-to-face interactions once again.

OUR MESSAGE TO THE WORLD

With New Zealand's international profile stronger than ever, we have had a unique time-bound opportunity to promote our outstanding food and beverage products while our borders are closed to the world. We were involved in the development of government's Made with Care campaign from its early stages, which has

helped amplify our premium New Zealand wine story and extend its reach internationally. The Made with Care campaign, led by New Zealand Trade and Enterprise (NZTE), aligns perfectly with our industry's core focus on sustainability, valuing our people and looking after our land for future generations.

NEW ZEALAND WINE ON THE GLOBAL STAGE

In February, our teams in Canada, USA, UK and New Zealand collaborated to provide a wide range of content across virtual platforms to our global audience. The inaugural virtual New Zealand Wine Week (NZWW) included panel discussions with New Zealand winemakers who explored diverse themes such as What's New and What's Next?, Pinot Noir Soils and in collaboration

“I can honestly say I found great wines (and people and food) in every region; the experience was transformational.”

CHRIS STRUCK, SOMMELIER NEW YORK CITY,
REPORTED IN VINEPAIR, OCTOBER 2020



CHINA ROADSHOW



with Harpers Wine & Spirit publication, a sustainability webinar challenging the myths around food miles.

The week shone a spotlight on New Zealand with 6,770 people tuning in to the activities throughout the week and media coverage reaching 111 million people. For 2022, we will be extending the NZWW programme into Asia.

And after a one-year hiatus, NZW China was able to host physical events again. The NZW Pure Discovery Roadshows ran in Shenzhen, Beijing and Shanghai in May 2021, with over 1,000 trade and 500 consumer attendees, and 45 brands showcased.

DO SOMETHING NEW, NEW ZEALAND

In addition to NZTE, NZW also collaborated with organisations working hard internationally and domestically to build awareness and strengthen perceptions of New Zealand, such as Tourism New Zealand (TNZ).

With the closure of international borders, NZW launched the Visit the Vines Domestic Wine Tourism consumer campaign in June 2020. The campaign leveraged off TNZ's Do Something New, New Zealand campaign and encouraged New Zealanders to Sip, Dine, Stay or Play at winery visitor experiences. To complement the campaign, in December 2020 NZW launched a Scan and Win



consumer domestic trip giveaway for visitors to winery experiences, with a 55% participation rate from Wine Tourism winery members.

DISCOVER NEW ZEALAND WINE ONLINE

With physical wine fairs not being possible around the world, NZW has identified other ways to increase the discoverability of New Zealand wines. We have offered our members the opportunity to have their wines listed in the New Zealand Wine Catalogue, operated by Bottlebooks, an online platform used by retailers and events such as the London Wine Fair and ProWein. To date, 197 wineries have signed up. The New Zealand Wine Catalogue is the go-to resource for anyone interested in listing or seeking to represent New Zealand wines in their market as well as for wineries to display all their important brand assets in one place. NZW recently exhibited at the Digital London Wine Fair, which was an exciting opportunity for the New Zealand Wine Catalogue to be viewed by any attendee searching for New Zealand wines. ■

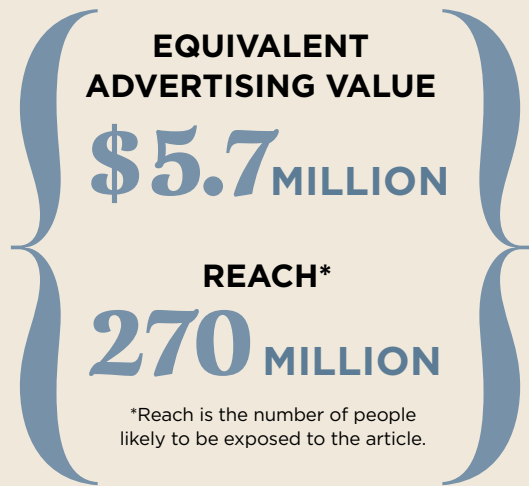
**“Great wines bring people together.
But the great wines of New Zealand do so
much more than that: They connect us all
with the generations of people who have
cherished the land and relied on the seas.”**

FOODANDWINE.COM, DECEMBER 2020

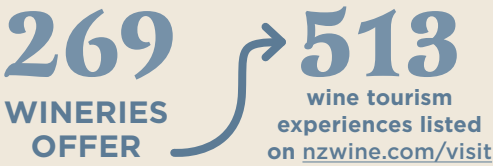


Global PR

The NZW Global PR Programme ensures that New Zealand wine continues to be a vibrant part of the media conversation globally. The **NZW Media Hub** is where international media can access stories about New Zealand wine, free of charge, and use as they see fit. The Hub currently features over 50 stories about the New Zealand wine industry, and is continuing to grow.

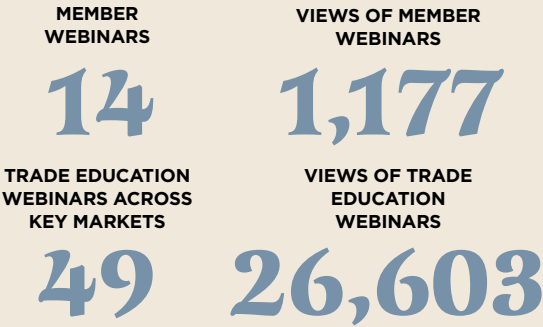


Wine Tourism



Webinars

Providing our membership with relevant and timely information in an ever-changing global wine landscape has remained a key driver for our team. The area of 'Intel and Insights' has become a major focus over the past year, delivering:



Online
nzwine.com

Annual statistics

WEBSITE USERS

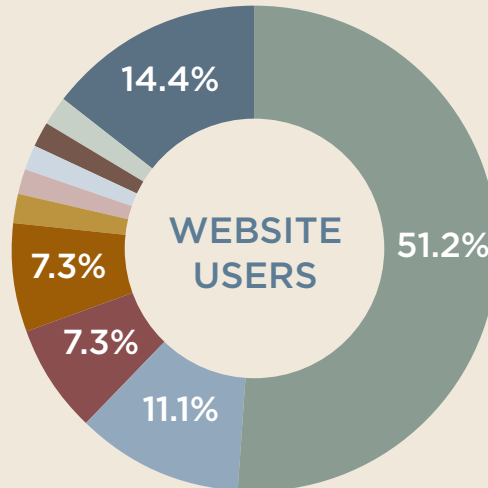
169,430

PAGE VIEWS

634,274

TOP PAGES

1. Wine Regions
2. Marlborough Wine Region
3. Statistics & Reports
4. Winery Directory



- NEW ZEALAND
- UNITED STATES
- UNITED KINGDOM
- AUSTRALIA
- CANADA
- CHINA
- JAPAN
- GERMANY
- FRANCE
- OTHERS



Social Media

Our social media goal was to grow a community of highly engaged New Zealand wine lovers, engage

with members, and demonstrate leadership in the New Zealand wine industry online by equipping members with the tools to leverage social media campaigns.

PROFILE IMPRESSIONS

4,726,610

(1.4% INCREASE)

PROFILE ENGAGEMENTS

143,240

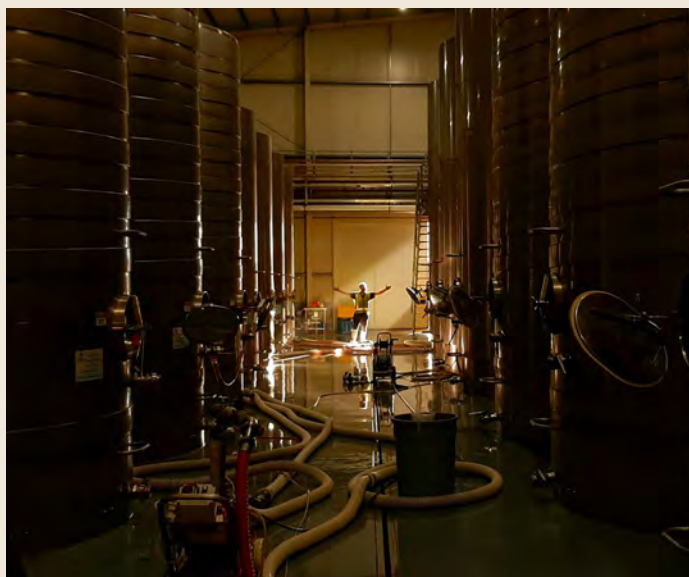
(20.3% INCREASE)

TOTAL FOLLOWERS ACROSS PLATFORMS

56,999

CURRENT NUMBER OF MENTIONS ON #NZWINE

184,726



“I’m looking for joy, deliciousness, and honest intentions. I want to feel the wine, be transported by it, have my eyes pop open and utter ‘dammit, this is why wine exists.’ New Zealand sets a high bar when it comes to this criteria.”

LAUREN MOWERY, FORBES.COM, FEBRUARY 2021



Financials

High-level breakdown (year to 30 June 2021)

New Zealand Winegrowers (NZW) is the industry organisation of and for the winemakers and grape growers of New Zealand.

These are the accounts for NZW and its subsidiaries, NZW Wines Limited Partnership and NZW Research Centre Limited trading as Bragato Research Institute (BRI).

Operating income includes the grape and wine levies. These are used to fund marketing, research, environment and advocacy activities. User pays activities include marketing events in New Zealand and overseas, the Sustainable Winegrowing New Zealand programme,

provision for the Wine Export Certification Service and Young Viticulturist and Young Winemaker Competitions.

The BRI provides 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 NZW for the year ended 30 June 2021.

OPERATING INCOME

\$16.6m
↓38%

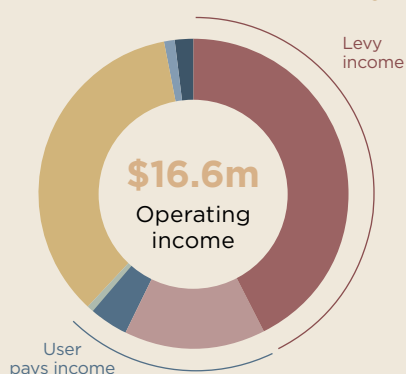
EXPENDITURE

\$17.0m
↓16%

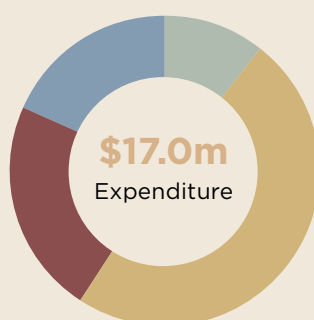
ASSETS/RESERVES

\$12.1m

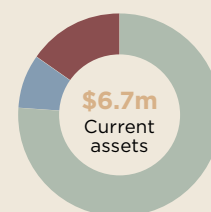
OPERATING INCOME AND RESERVES SUMMARIES



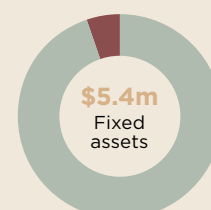
| | |
|--|--|
| Wine levy \$7.2m ↓12% | External funding for research \$5.9m ↓52% |
| Grape levy \$2.5m ↓25% | Young Vit & Winemaker \$0.2 ↑12% |
| Marketing user pays 0.5m ↓69% | Other \$0.3m ↓27% |
| SWNZ \$0.03 ↓96% | |
| Romeo Bragato conference \$0m ↓100% | |



| | |
|-------------------------|------------------------------|
| Social \$1.8m ↓42% | Environmental \$3.8m ↓16% |
| Economic \$8.3m ↓12% | General \$3.1m ↓3% |



| | |
|------------------------|---------------------|
| Levy incl BRI \$5.1 | User pays \$0.6m |
| Biosecurity \$1m | |



| | |
|---|------------------|
| Winery incl fitout and equip \$5.12m | Other \$0.28m |
|---|------------------|

Breakdown of expenditure by objective

| Key Achievements | Levy | Non-Levy |
|--|-----------------|------------------|
| Research and Innovation Winery fermented 186 wines | \$2.21m ↑6% | \$4.56m ↓21% |
| International Marketing and Tourism 269 members offer tourism experiences 49 trade education webinars | \$2.01m ↓14% | \$0.22m ↓70% |
| Administration Technology review RFP undertaken | \$1.72m ↓8% | \$0.34m ↓10% |
| Events in New Zealand 14 member webinars | \$0.11m ↑8% | \$0.40m ↓58% |
| Environment SWNZ programme Spray Days | \$1.23m ↑84% | \$0.07m ↓92% |
| Member Information 926 attended Grape Days | \$1.16m ↑6% | \$0.05m ↓86% |
| Regions Regional Membership Council Regional Funding and Support | \$1.11m ↑2% | |
| International Trade (Advocacy) UK/NZ FTA Submission Vice-presidency of FIVS | \$0.27m ↓19% | \$0.16m ↓14% |
| Domestic Trade (Advocacy) COVID-19 support to members 11 domestic submissions to government | \$0.63m ↓14% | |
| People Women in Wine Labour strategy and RSE Young Viticulturist & Young Winemaker Competitions | \$0.23m ↓17% | \$0.22m ↑21% |
| Biosecurity Building industry capability 3 submissions to government | \$0.31m ↑12% | |
| Total | \$10.99m ↑1% | \$6.02m ↓36% |
| Total expenditure | | \$17.01m ↓16% |

Statistics

Summary of New Zealand wine (2012-2021)

| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Number of wineries | 703 | 698 | 699 | 673 | 675 | 677 | 697 | 716 | 717 | 731 |
| Number of growers | 824 | 835 | 858 | 762 | 747 | 726 | 699 | 692 | 694 | 732 |
| Producing area (hectares) | 35,337 | 35,182 | 35,510 | 35,463 | 36,226 | 36,943 | 38,073 | 39,061 | 39,934 | 40,323 |
| Average yield (tonnes per hectare) | 7.6 | 9.8 | 12.6 | 9.1 | 12.0 | 10.7 | 11.0 | 10.7 | 11.4 | 9.2 |
| Average grape price (NZ\$ per tonne) | 1,359 | 1,688 | 1,666 | 1,732 | 1,807 | 1,752 | 1,841 | 1,890 | 1,920 | N/A |
| Tonnes crushed (thousands of tonnes) | 269 | 345 | 445 | 326 | 436 | 396 | 419 | 413 | 457 | 370 |
| Total production (millions of litres) | 194.0 | 248.4 | 320.4 | 234.7 | 313.9 | 285.1 | 301.7 | 297.4 | 329.0 | 266.4 |
| Domestic sales of NZ wine (millions of litres) | 64.6 | 51.7 | 49.9 | 61.9 | 56.2 | 52.1 | 53.6 | 50.6 | 50.0 | 49.2 |
| Consumption per capita NZ wine (litres) | 14.7 | 11.6 | 11.2 | 13.7 | 12.2 | 11.0 | 10.9 | 10.3 | 10.0 | 9.6 |
| Total domestic sales of all wine (millions of litres) | 91.9 | 92.5 | 90.6 | 96.0 | 93.4 | 92.0 | 94.5 | 93.1 | 91.7 | 90.2 |
| Consumption per capita all wines (litres) | 20.9 | 20.8 | 20.3 | 20.8 | 20.2 | 19.5 | 19.2 | 18.9 | 18.3 | 17.7 |
| Export volume (millions of litres) | 178.9 | 169.6 | 186.9 | 209.4 | 213.4 | 253.0 | 255.0 | 270.4 | 286.5 | 284.9 |
| Export value (millions of NZ\$ FOB) | 1,177 | 1,210 | 1,328 | 1,424 | 1,570 | 1,663 | 1,705 | 1,825 | 1,923 | 1,870 |

N/A - Not yet available



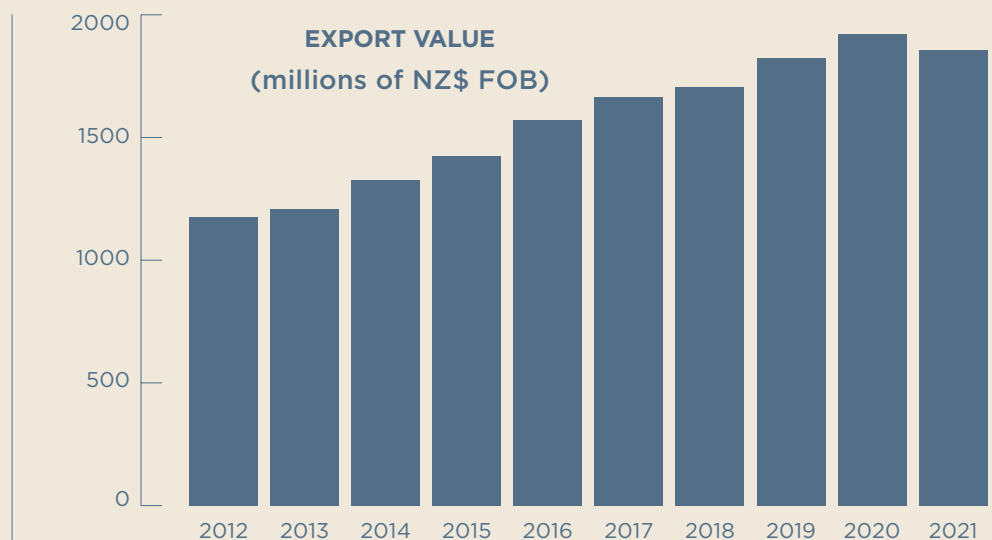
PRODUCING AREA (ha)

2012

35,337

2021

40,323



New Zealand Winegrowers membership (2012-2021)

| Wineries by size* | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Small | 622 | 617 | 611 | 587 | 581 | 582 | 603 | 624 | 628 | 645 |
| Medium | 71 | 71 | 65 | 69 | 78 | 77 | 77 | 73 | 69 | 67 |
| Large | 10 | 10 | 23 | 17 | 16 | 18 | 17 | 19 | 20 | 19 |
| Total | 703 | 698 | 699 | 673 | 675 | 677 | 697 | 716 | 717 | 731 |

*From 2008: Category 1 (small)—annual sales not exceeding 200,000 litres. Category 2 (medium)—annual sales between 200,000 and 4,000,000 litres. Category 3 (large)—annual sales exceeding 4,000,000 litres.

| Wineries by region | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-----------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Northland | 16 | 13 | 15 | 14 | 15 | 16 | 17 | 20 | 20 | 18 |
| Auckland | 118 | 116 | 114 | 111 | 110 | 109 | 102 | 100 | 99 | 99 |
| Waikato/Bay of Plenty | 15 | 13 | 13 | 12 | 9 | 8 | 10 | 7 | 9 | 8 |
| Gisborne | 24 | 21 | 19 | 18 | 18 | 18 | 17 | 16 | 15 | 33 |
| Hawke's Bay | 84 | 77 | 76 | 75 | 76 | 79 | 91 | 98 | 100 | 104 |
| Wairarapa | 64 | 65 | 67 | 67 | 68 | 64 | 69 | 72 | 67 | 67 |
| Marlborough | 148 | 152 | 151 | 140 | 141 | 139 | 141 | 150 | 158 | 159 |
| Nelson | 36 | 38 | 37 | 35 | 36 | 36 | 38 | 42 | 38 | 35 |
| North Canterbury | 68 | 70 | 66 | 67 | 64 | 65 | 67 | 68 | 71 | 68 |
| Central Otago | 120 | 124 | 132 | 127 | 133 | 137 | 136 | 135 | 133 | 134 |
| Waitaki Valley | | | | | | | 4 | 4 | 4 | 3 |
| Other areas | 10 | 9 | 9 | 7 | 5 | 6 | 5 | 4 | 3 | 3 |
| Total | 703 | 698 | 699 | 673 | 675 | 677 | 697 | 716 | 717 | 731 |

| Grape growers by region | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| Northland | | | | | | | | | 4 | 4 |
| Auckland | 9 | 11 | 11 | 10 | 5 | 4 | 3 | 8 | 5 | 5 |
| Waikato/Bay of Plenty | 2 | 2 | | | | | | | | |
| Gisborne | 54 | 53 | 48 | 41 | 41 | 36 | 33 | 31 | 27 | 14 |
| Hawke's Bay | 103 | 104 | 102 | 74 | 71 | 65 | 62 | 58 | 57 | 65 |
| Wairarapa | 24 | 30 | 17 | 14 | 15 | 17 | 13 | 14 | 14 | 19 |
| Marlborough | 551 | 548 | 581 | 535 | 534 | 519 | 510 | 509 | 514 | 531 |
| Nelson | 38 | 40 | 52 | 38 | 36 | 37 | 35 | 27 | 27 | 32 |
| North Canterbury | 8 | 14 | 15 | 18 | 14 | 14 | 9 | 13 | 10 | 19 |
| Otago | 35 | 33 | 32 | 32 | 31 | | | | | |
| Central Otago | | | | | | 33 | 33 | 32 | 36 | 43 |
| Waitaki Valley | | | | | | 1 | 1 | | | |
| Total | 824 | 835 | 858 | 762 | 747 | 726 | 699 | 692 | 694 | 732 |

Auckland and Northland are reported separately from 2020.

Statistics

New Zealand producing vineyard area (2012-2021)

| By grape variety (ha) | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | *2021 |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Sauvignon Blanc | 20,270 | 20,015 | 20,029 | 20,497 | 21,400 | 22,230 | 23,426 | 24,605 | 25,160 | 25,326 |
| Pinot Noir | 5,388 | 5,488 | 5,509 | 5,514 | 5,519 | 5,572 | 5,588 | 5,549 | 5,642 | 5,779 |
| Chardonnay | 3,229 | 3,202 | 3,346 | 3,117 | 3,116 | 3,114 | 3,106 | 3,179 | 3,222 | 3,194 |
| Pinot Gris | 2,485 | 2,403 | 2,451 | 2,422 | 2,439 | 2,369 | 2,471 | 2,413 | 2,593 | 2,774 |
| Merlot | 1,234 | 1,255 | 1,290 | 1,239 | 1,198 | 1,211 | 1,133 | 1,093 | 1,087 | 1,086 |
| Riesling | 770 | 787 | 784 | 767 | 753 | 721 | 679 | 572 | 569 | 634 |
| Syrah | 387 | 408 | 433 | 436 | 426 | 439 | 432 | 440 | 437 | 434 |
| Cabernet Sauvignon | 305 | 301 | 289 | 275 | 253 | 249 | 250 | 216 | 219 | 217 |
| Gewürztraminer | 347 | 334 | 376 | 277 | 242 | 229 | 221 | 206 | 217 | 193 |
| Malbec | 140 | 142 | 127 | 129 | 119 | 121 | 114 | 111 | 111 | 101 |
| Sauvignon Gris** | | | | 104 | 113 | 109 | 105 | 105 | 105 | 106 |
| Cabernet Franc | 119 | 119 | 113 | 109 | 99 | 91 | 97 | 91 | 93 | 90 |
| Viognier** | | | | 129 | 119 | 97 | 97 | 89 | 85 | 69 |
| Other varietals | 661 | 728 | 764 | 448 | 430 | 391 | 354 | 394 | 395 | 320 |
| Total | 35,335 | 35,182 | 35,511 | 35,463 | 36,226 | 36,943 | 38,073 | 39,061 | 39,934 | 40,323 |

| By region (ha) | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | *2021 |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Northland | | | | | | | | 73 | 71 | 74 |
| Auckland | | | | | | | | 313 | 319 | 289 |
| Auckland/Northland | 411 | 414 | 392 | 403 | 387 | 387 | 392 | | | |
| Waikato/Bay of Plenty | 24 | 24 | 25 | 16 | 3 | 13 | 15 | 12 | 12 | 19 |
| Gisborne | 1,635 | 1,599 | 1,915 | 1,440 | 1,350 | 1,246 | 1,181 | 1,163 | 1,191 | 1,183 |
| Hawke's Bay | 5,030 | 4,846 | 4,774 | 4,638 | 4,641 | 4,615 | 4,678 | 4,883 | ***5,034 | 4,643 |
| Wairarapa | 979 | 991 | 995 | 1,003 | 1,005 | 932 | 969 | 1,030 | 1,039 | 1,096 |
| Marlborough | 22,956 | 22,819 | 22,907 | 23,452 | 24,365 | 25,244 | 26,288 | 27,176 | 27,808 | 28,360 |
| Nelson | 1,011 | 1,095 | 1,123 | 1,141 | 1,135 | 1,093 | 1,162 | 1,105 | 1,102 | 1,092 |
| North Canterbury | 1,371 | 1,435 | 1,488 | 1,428 | 1,419 | 1,472 | 1,457 | 1,368 | 1,369 | 1,479 |
| Central Otago | 1,917 | 1,959 | 1,932 | 1,942 | 1,880 | 1,886 | 1,873 | 1,875 | 1,930 | 2,024 |
| Waitaki Valley | | | | | 41 | 55 | 58 | 63 | 59 | 65 |
| Other/Unknown | | | | | | | | | | |
| Total | 35,335 | 35,182 | 35,511 | 35,463 | 36,226 | 36,943 | 38,073 | 39,061 | 39,934 | 40,323 |

*Projections submitted in the 2021-23 Vineyard Register

**Reported separately since 2015

***The Hawke's Bay figures within the 2020 Annual Report contained an error that has now been corrected in this document and the 2021 Vineyard Report. The Hawke's Bay vineyard area was overstated in the 2020 Annual Report by approximately 450 hectares. The error largely related to the figures for Sauvignon Blanc. Auckland and Northland reported separately since 2019

Central Otago and Waitaki Valley reported separately from 2016

Source: New Zealand Winegrowers Vineyard Survey/Vineyard Register Reports

New Zealand Vintages (2012-2021)

| By grape variety (tonnes) | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Sauvignon Blanc | 181,121 | 228,781 | 310,240 | 216,078 | 303,711 | 285,862 | 296,573 | 302,157 | 326,058 | 268,079 |
| Chardonnay | 22,855 | 27,184 | 28,985 | 27,015 | 29,162 | 26,843 | 26,371 | 25,729 | 27,568 | 23,507 |
| Pinot Noir | 23,285 | 31,775 | 36,499 | 25,763 | 35,661 | 28,760 | 35,095 | 26,944 | 34,105 | 22,029 |
| Pinot Gris | 15,347 | 22,042 | 23,880 | 19,707 | 24,892 | 20,755 | 22,824 | 20,953 | 28,849 | 20,987 |
| Merlot | 8,046 | 10,076 | 10,756 | 9,397 | 9,321 | 7,714 | 10,623 | 9,240 | 11,166 | 9,877 |
| Riesling | 4,989 | 5,932 | 6,013 | 4,535 | 5,937 | 3,880 | 3,776 | 4,776 | 4,510 | 4,407 |
| Syrah | 1,431 | 2,240 | 2,178 | 1,497 | 1,756 | 1,733 | 2,126 | 2,230 | 2,392 | 2,537 |
| Cabernet Sauvignon | 1,120 | 1,465 | 1,742 | 1,376 | 1,537 | 974 | 1,169 | 1,076 | 1,210 | 1,156 |
| Sauvignon Gris | | | | | 1,182 | 944 | 1,080 | 1,002 | 880 | 1,178 |
| Gewürztraminer | 1,249 | 1,788 | 2,264 | 1,761 | 2,221 | 1,047 | 976 | 834 | 1,167 | 707 |
| Malbec | 694 | 825 | 1,135 | 586 | 483 | 697 | 782 | 741 | 793 | 535 |
| Rosé | | | | | | | | | | 530 |
| Other reds | 307 | 262 | 537 | 457 | 677 | 401 | 456 | 506 | 522 | 540 |
| Viognier | 839 | 519 | 1,148 | 720 | 771 | 266 | 444 | 318 | 235 | 488 |
| Cabernet Franc | 414 | 421 | 582 | 485 | 616 | 373 | 350 | 473 | 452 | 458 |
| Albariño | | | | | | | 162 | 269 | 284 | 371 |
| Semillon | 596 | 721 | 507 | 425 | 466 | 249 | 385 | 304 | 292 | 289 |
| Grüner Veltliner | | | 341 | 228 | 276 | 253 | 329 | 347 | 369 | 275 |
| Other Whites | 618 | 1,052 | 1,646 | 1,294 | 727 | 824 | 250 | 232 | 271 | 144 |
| Pinotage | 292 | 400 | 425 | 494 | 374 | 145 | 153 | 142 | 122 | 96 |
| Arneis | 163 | 220 | 336 | 268 | 257 | 239 | 152 | 91 | 162 | 91 |
| Muscat varieties | 578 | 634 | 455 | 301 | 329 | 450 | 323 | 200 | 234 | 33 |
| Survey total | 263,944 | 336,337 | 429,669 | 312,387 | 420,356 | 382,409 | 404,246 | 398,564 | 441,640 | 358,316 |
| Industry total* | 269,000 | 345,000 | 445,000 | 326,000 | 436,000 | 396,000 | 419,000 | 413,000 | 457,000 | 370,000 |

| By region (tonnes) | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Northland | 92 | 130 | 210 | 203 | 92 | 121 | 113 | 319 | 269 | 248 |
| Auckland | 1,220 | 789 | 1,392 | 824 | 1,267 | 934 | 787 | 1,585 | 1,249 | 1,239 |
| Waikato/Bay of Plenty | 7 | 12 | 63 | | 18 | | | | | |
| Gisborne | 15,590 | 15,567 | 16,192 | 17,280 | 15,944 | 16,337 | 13,000 | 16,238 | 18,959 | 17,450 |
| Hawke's Bay | 32,793 | 38,829 | 44,502 | 36,057 | 42,958 | 33,679 | 41,061 | 37,173 | 43,247 | 41,138 |
| Wairarapa | 4,271 | 4,798 | 5,743 | 3,559 | 5,049 | 3,822 | 4,592 | 4,390 | 4,472 | 3,131 |
| Marlborough | 188,648 | 251,630 | 329,571 | 233,182 | 323,290 | 302,396 | 313,038 | 305,467 | 343,036 | 269,521 |
| Nelson | 6,129 | 7,777 | 10,494 | 6,777 | 10,028 | 8,540 | 9,120 | 12,370 | 11,572 | 7,804 |
| North Canterbury | 7,079 | 8,348 | 10,962 | 5,395 | 12,170 | 8,240 | 11,157 | 8,534 | 9,861 | 7,291 |
| Central Otago | 8,115 | 8,407 | 10,540 | 8,951 | 9,177 | 8,324 | 11,358 | 11,868 | 8,515 | 10,324 |
| Waitaki Valley | | | | | | | 170 | 41 | 114 | 23 |
| Other | | 50 | | 159 | 363 | 16 | 3 | 579 | 347 | 147 |
| Survey total | 263,944 | 336,337 | 429,669 | 312,387 | 420,356 | 382,409 | 404,399 | 398,564 | 441,640 | 358,316 |
| Industry total* | 269,000 | 345,000 | 445,000 | 326,000 | 436,000 | 396,000 | 419,000 | 413,000 | 457,000 | 370,000 |

*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.

Source: New Zealand Winegrowers Annual Vintage Surveys

Statistics

New Zealand wine exports by market (2012-2021)

| | | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|----------------|------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| USA | L | 39.481 | 43.362 | 48.914 | 53.858 | 61.636 | 72.929 | 72.701 | 76.234 | 82.598 | 80.252 |
| | NZ\$ | 251.329 | 283.651 | 328.049 | 372.241 | 460.600 | 517.258 | 521.738 | 557.000 | 622.150 | 589.121 |
| United Kingdom | L | 57.657 | 47.622 | 51.868 | 59.745 | 58.936 | 74.638 | 74.435 | 82.728 | 82.448 | 80.005 |
| | NZ\$ | 284.021 | 278.415 | 318.611 | 353.931 | 381.809 | 389.272 | 386.740 | 446.584 | 464.092 | 448.864 |
| Australia | L | 53.474 | 49.764 | 53.709 | 57.528 | 52.960 | 59.672 | 56.059 | 56.335 | 61.852 | 65.819 |
| | NZ\$ | 380.473 | 373.048 | 380.851 | 362.188 | 361.677 | 371.099 | 366.997 | 367.722 | 365.083 | 379.836 |
| Canada | L | 6.509 | 7.272 | 7.703 | 9.583 | 10.612 | 11.388 | 12.776 | 12.412 | 12.278 | 11.036 |
| | NZ\$ | 70.906 | 78.177 | 78.941 | 94.906 | 107.372 | 107.434 | 127.933 | 130.133 | 135.961 | 112.725 |
| Germany | L | 1.429 | 1.532 | 2.682 | 2.073 | 2.667 | 1.728 | 1.685 | 8.413 | 14.021 | 13.503 |
| | NZ\$ | 7.639 | 9.532 | 14.459 | 10.018 | 14.501 | 10.740 | 9.061 | 44.917 | 66.384 | 56.854 |
| Ireland | L | 2.158 | 2.052 | 2.212 | 2.512 | 2.888 | 2.986 | 3.448 | 3.020 | 3.243 | 3.578 |
| | NZ\$ | 16.326 | 14.420 | 16.353 | 17.472 | 21.309 | 21.658 | 27.183 | 25.874 | 27.011 | 33.421 |
| China | L | 2.200 | 2.219 | 1.810 | 1.858 | 2.028 | 2.270 | 2.520 | 2.525 | 2.002 | 2.088 |
| | NZ\$ | 25.234 | 26.868 | 24.803 | 27.069 | 27.593 | 31.758 | 37.385 | 39.177 | 26.698 | 28.017 |
| Netherlands | L | 4.586 | 4.128 | 5.022 | 6.744 | 6.801 | 8.203 | 9.322 | 4.767 | 3.707 | 3.102 |
| | NZ\$ | 26.744 | 26.743 | 33.383 | 41.479 | 44.480 | 45.439 | 50.853 | 28.655 | 26.149 | 24.095 |
| Hong Kong | L | 1.524 | 1.570 | 1.348 | 1.399 | 1.283 | 1.353 | 1.178 | 1.067 | 1.070 | 1.337 |
| | NZ\$ | 18.393 | 20.474 | 16.853 | 17.680 | 17.333 | 18.553 | 15.671 | 13.337 | 14.112 | 17.868 |
| Singapore | L | 1.149 | 1.285 | 1.572 | 1.580 | 1.567 | 1.306 | 1.338 | 1.314 | 1.148 | 1.148 |
| | NZ\$ | 14.515 | 16.148 | 21.326 | 20.691 | 20.570 | 18.596 | 19.165 | 18.884 | 16.526 | 16.912 |
| Japan | L | 1.119 | 1.152 | 1.196 | 1.193 | 1.150 | 1.273 | 1.225 | 1.342 | 1.272 | 1.143 |
| | NZ\$ | 12.891 | 13.646 | 13.908 | 13.773 | 13.796 | 14.565 | 14.047 | 15.003 | 14.873 | 12.299 |
| Sweden | L | 1.459 | 1.563 | 1.562 | 1.630 | 1.843 | 1.779 | 1.521 | 1.631 | 1.801 | 1.167 |
| | NZ\$ | 11.554 | 13.090 | 13.020 | 13.163 | 15.276 | 14.208 | 12.903 | 13.250 | 15.173 | 9.853 |
| Denmark | L | 1.004 | 0.790 | 0.864 | 1.191 | 0.942 | 1.252 | 1.322 | 1.362 | 1.381 | 1.553 |
| | NZ\$ | 6.566 | 5.388 | 6.652 | 8.042 | 7.182 | 8.368 | 8.594 | 8.897 | 8.719 | 9.769 |
| Norway | L | 0.205 | 0.224 | 0.334 | 0.270 | 0.284 | 0.320 | 0.316 | 0.550 | 0.605 | 0.998 |
| | NZ\$ | 1.483 | 1.591 | 2.742 | 2.045 | 2.511 | 2.508 | 2.648 | 3.569 | 3.946 | 5.969 |
| Finland | L | 0.219 | 0.185 | 0.259 | 0.310 | 0.258 | 0.248 | 0.261 | 0.314 | 0.295 | 0.315 |
| | NZ\$ | 2.134 | 1.572 | 2.283 | 2.455 | 2.388 | 2.004 | 2.340 | 2.809 | 2.477 | 2.824 |
| Others | L | 4.706 | 4.942 | 5.834 | 7.947 | 7.516 | 11.618 | 14.979 | 16.351 | 16.740 | 17.901 |
| | NZ\$ | 46.638 | 47.758 | 56.124 | 67.307 | 70.938 | 89.507 | 101.377 | 109.304 | 113.339 | 121.748 |
| Total | L | 178.880 | 169.669 | 186.889 | 209.419 | 213.371 | 252.962 | 255.093 | 270.364 | 286.461 | 284.942 |
| | NZ\$ | 1,176.847 | 1,210.525 | 1,328.358 | 1,424.461 | 1,569.515 | 1,662.968 | 1,704.644 | 1,825.116 | 1,922.694 | 1,870.173 |

All litre and NZ\$ figures are in millions

Source: Statistics New Zealand

New Zealand wine exports by market (year end June 2021)

| | | White 750ml | White Other | White Total | Red 750ml | Red Other | Red Total | Sparkling | Fortified | Total |
|----------------|------|----------------|----------------|----------------|--------------|--------------|--------------|-----------|-----------|----------------|
| USA | L | 53.475 | 23.993 | 77.468 | 2.386 | 0.056 | 2.442 | 0.341 | .000 | 80.252 |
| | NZ\$ | 458.594 | 99.980 | 558.574 | 27.067 | 0.243 | 27.310 | 3.235 | .001 | 589.121 |
| | \$/L | \$8.58 | \$4.17 | \$7.21 | \$11.34 | \$4.34 | \$11.18 | \$9.48 | \$466.33 | \$7.34 |
| United Kingdom | L | 30.300 | 46.243 | 76.542 | 2.914 | 0.387 | 3.301 | 0.138 | 0.024 | 80.005 |
| | NZ\$ | 235.186 | 176.427 | 411.613 | 32.884 | 2.760 | 35.644 | 1.460 | 0.146 | 448.864 |
| | \$/L | \$7.76 | \$3.82 | \$5.38 | \$11.28 | \$7.14 | \$10.80 | \$10.58 | \$6.10 | \$5.61 |
| Australia | L | 23.395 | 36.935 | 60.330 | 3.993 | 0.042 | 4.036 | 1.454 | 0.00 | 65.819 |
| | NZ\$ | 167.684 | 148.087 | 315.770 | 48.864 | 0.445 | 49.309 | 14.757 | 0.00 | 379.836 |
| | \$/L | \$7.17 | \$4.01 | \$5.23 | \$12.24 | \$10.50 | \$12.22 | \$10.15 | \$0.00 | \$5.77 |
| Canada | L | 9.441 | 0.541 | 9.982 | 1.016 | 0.00 | 1.016 | 0.038 | 0.00 | 11.036 |
| | NZ\$ | 96.072 | 3.832 | 99.904 | 12.445 | 0.00 | 12.445 | 0.376 | 0.00 | 112.725 |
| | \$/L | \$10.18 | \$7.09 | \$10.01 | \$12.25 | \$0.00 | \$12.25 | \$9.95 | \$0.00 | \$10.21 |
| Germany | L | 0.806 | 12.200 | 13.006 | 0.130 | 0.361 | 0.490 | 0.006 | 0.00 | 13.503 |
| | NZ\$ | 7.333 | 46.031 | 53.364 | 1.619 | 1.808 | 3.427 | 0.062 | 0.00 | 56.854 |
| | \$/L | \$9.10 | \$3.77 | \$4.10 | \$12.50 | \$5.01 | \$6.99 | \$10.07 | \$0.00 | \$4.21 |
| Ireland | L | 2.509 | 0.787 | 3.296 | 0.216 | 0.007 | 0.223 | 0.059 | 0.00 | 3.578 |
| | NZ\$ | 22.729 | 7.443 | 30.172 | 2.469 | 0.108 | 2.578 | 0.671 | 0.00 | 33.421 |
| | \$/L | \$9.06 | \$9.46 | \$9.15 | \$11.45 | \$15.76 | \$11.58 | \$11.35 | \$0.00 | \$9.34 |
| China | L | 1.205 | 0.00 | 1.205 | 0.856 | 0.00 | 0.856 | 0.026 | 0.00 | 2.088 |
| | NZ\$ | 13.753 | 0.00 | 13.753 | 13.919 | 0.019 | 13.938 | 0.236 | 0.089 | 28.017 |
| | \$/L | \$11.41 | \$0.00 | \$11.41 | \$16.27 | \$40.08 | \$16.28 | \$9.01 | \$199.61 | \$13.42 |
| Netherlands | L | 2.538 | 0.192 | 2.730 | 0.332 | 0.00 | 0.332 | 0.039 | 0.00 | 3.102 |
| | NZ\$ | 19.865 | 0.764 | 20.629 | 2.985 | 0.006 | 2.991 | 0.475 | 0.00 | 24.095 |
| | \$/L | \$7.83 | \$3.97 | \$7.56 | \$9.00 | \$45.76 | \$9.02 | \$12.04 | \$0.00 | \$7.77 |
| Hong Kong | L | 1.114 | 0.006 | 1.121 | 0.186 | 0.001 | 0.186 | 0.029 | 0.00 | 1.337 |
| | NZ\$ | 12.947 | .085 | 13.032 | 3.825 | 0.099 | 3.924 | 0.909 | 0.004 | 17.868 |
| | \$/L | \$11.62 | \$13.32 | \$11.63 | \$20.62 | \$109.21 | \$21.05 | \$30.96 | \$13.14 | \$13.37 |
| Singapore | L | 0.900 | 0.001 | 0.901 | 0.242 | 0.001 | 0.243 | 0.005 | 0.00 | 1.148 |
| | NZ\$ | 12.664 | 0.010 | 12.673 | 4.088 | 0.011 | 4.099 | 0.140 | 0.00 | 16.912 |
| | \$/L | \$14.07 | \$10.64 | \$14.07 | \$16.89 | \$21.39 | \$16.90 | \$30.08 | \$0.00 | \$14.73 |
| Japan | L | 0.705 | 0.151 | 0.855 | 0.240 | 0.002 | 0.242 | 0.045 | 0.001 | 1.143 |
| | NZ\$ | 7.143 | 0.730 | 7.874 | 3.936 | 0.017 | 3.953 | 0.464 | 0.009 | 12.299 |
| | \$/L | \$10.14 | \$4.85 | \$9.20 | \$16.37 | \$10.57 | \$16.33 | \$10.36 | \$13.75 | \$10.76 |
| Sweden | L | 0.599 | 0.336 | 0.895 | 0.238 | 0.001 | 0.239 | 0.033 | 0.00 | 1.167 |
| | NZ\$ | 4.971 | 1.587 | 6.558 | 2.955 | .0005 | 2.960 | 0.334 | 0.00 | 9.853 |
| | \$/L | \$8.90 | \$4.72 | \$7.33 | \$12.40 | \$6.11 | \$12.37 | \$10.16 | \$0.00 | \$8.44 |
| Denmark | L | 0.593 | 0.842 | 1.435 | 0.114 | 0.00 | 0.114 | 0.003 | 0.00 | 1.553 |
| | NZ\$ | 4.718 | 3.739 | 8.456 | 1.249 | 0.006 | 1.255 | 0.057 | 0.00 | 9.769 |
| | \$/L | \$7.95 | \$4.44 | \$5.89 | \$10.97 | \$25.85 | \$11.00 | \$16.74 | \$0.00 | \$6.29 |
| Norway | L | 0.389 | 0.550 | 0.939 | 0.050 | 0.00 | 0.050 | 0.009 | 0.00 | 0.998 |
| | NZ\$ | 2.832 | 2.299 | 5.130 | 0.720 | 0.00 | 0.720 | 0.118 | 0.00 | 5.969 |
| | \$/L | \$7.28 | \$4.18 | \$5.46 | \$14.41 | \$0.00 | \$14.41 | \$13.05 | \$0.00 | \$5.98 |
| Finland | L | 0.142 | 0.029 | 0.171 | 0.035 | 0.00 | 0.035 | 0.109 | 0.00 | 0.315 |
| | NZ\$ | 1.317 | 0.114 | 1.431 | 0.403 | 0.00 | 0.403 | 0.990 | 0.00 | 2.824 |
| | \$/L | \$9.27 | \$3.98 | \$8.39 | \$11.42 | \$0.00 | \$11.42 | \$9.09 | \$0.00 | \$8.97 |
| Others | L | 8.453 | 8.361 | 16.814 | 0.970 | 0.047 | 1.017 | 0.070 | 0.00 | 17.901 |
| | NZ\$ | 73.972 | 33.902 | 107.874 | 12.564 | 0.464 | 13.028 | 0.835 | 0.011 | 121.748 |
| | \$/L | \$8.75 | \$4.05 | \$6.42 | \$12.95 | \$9.89 | \$12.81 | \$11.88 | \$24.89 | \$6.80 |
| Total | L | 136.524 | 131.166 | 267.690 | 13.917 | 0.904 | 14.822 | 2.405 | 0.026 | 284.942 |
| | NZ\$ | 1,141.782 | 525.027 | 1,666.809 | 171.992 | 5.992 | 177.984 | 25.120 | 0.261 | 1,870.173 |
| | \$/L | \$8.36 | \$4.00 | \$6.23 | \$12.36 | \$6.63 | \$12.01 | \$10.44 | \$10.11 | \$6.56 |

All litre and NZ\$ figures are in millions

Source: Statistics New Zealand

Statistics

New Zealand wine exports by variety (2012-2021)

| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Sauvignon Blanc | 150.883 | 144.551 | 160.580 | 177.776 | 181.944 | 217.890 | 220.065 | 231.194 | 249.445 | 242.876 |
| Pinot Noir | 10.560 | 10.170 | 10.705 | 10.886 | 12.171 | 12.510 | 13.171 | 12.331 | 10.282 | 10.868 |
| Pinot Gris | 4.091 | 3.612 | 4.688 | 4.479 | 4.713 | 7.151 | 7.740 | 8.678 | 9.207 | 10.671 |
| Rosé | 0.586 | 0.490 | 0.712 | 0.835 | 0.942 | 2.389 | 3.656 | 5.195 | 5.592 | 7.996 |
| Chardonnay | 5.510 | 4.914 | 4.627 | 5.277 | 6.063 | 6.172 | 4.766 | 5.088 | 4.649 | 4.914 |
| Sparkling | 1.392 | 1.451 | 1.700 | 1.441 | 1.412 | 1.088 | 1.167 | 1.150 | 1.366 | 3.272 |
| Merlot | 2.379 | 2.059 | 1.765 | 1.711 | 1.906 | 2.250 | 2.060 | 2.769 | 1.456 | 1.641 |
| Riesling | 1.057 | 0.924 | 0.996 | 0.113 | 0.150 | 1.099 | 0.962 | 1.047 | 1.184 | 1.089 |
| Generic white | 0.719 | 0.266 | 0.043 | 0.384 | 0.380 | 0.085 | 0.120 | 0.126 | 0.077 | 0.533 |
| Cabernet or Merlot blend | 1.254 | 1.424 | 1.030 | 0.754 | 0.836 | 0.972 | 0.798 | 0.810 | 0.436 | 0.453 |
| Syrah | 0.309 | 0.270 | 0.242 | 0.954 | 1.065 | 0.283 | 0.375 | 0.346 | 0.273 | 0.236 |
| Other white varieties | 0.118 | 0.103 | 0.127 | 0.282 | 0.341 | 0.453 | 0.420 | 0.235 | 0.254 | 0.217 |
| Gewürztraminer | 0.202 | 0.192 | 0.212 | 0.017 | 0.026 | 0.182 | 0.150 | 0.148 | 0.135 | 0.119 |
| Other red varieties | 0.095 | 0.085 | 0.068 | 0.041 | 0.048 | 0.128 | 0.064 | 0.085 | 0.047 | 0.074 |
| Sparkling Sauvignon | 0.217 | 0.360 | 0.107 | 0.175 | 0.183 | 0.059 | 0.101 | 0.042 | 0.056 | 0.069 |
| Generic red | 0.021 | 0.043 | 0.002 | 0.170 | 0.087 | 0.126 | 0.013 | 0.008 | 0.042 | 0.032 |
| Chardonnay blend | 0.149 | 0.997 | 0.047 | 0.005 | 0.132 | 0.007 | 0.008 | 0.010 | 0.013 | 0.028 |
| Cabernet Sauvignon | 0.030 | 0.046 | 0.006 | 0.012 | 0.013 | 0.011 | 0.023 | 0.011 | 0.019 | 0.020 |
| Sweet wines | 0.055 | 0.038 | 0.037 | 0.085 | 0.134 | 0.051 | 0.032 | 0.024 | 0.021 | 0.019 |
| Chenin Blanc | 0.013 | 0.016 | 0.017 | 0.041 | 0.028 | 0.008 | 0.009 | 0.011 | 0.010 | 0.016 |
| Sauvignon blend | 0.140 | 0.422 | 0.034 | 0.014 | 0.013 | 0.135 | 0.102 | 0.018 | 0.009 | 0.013 |
| Fortified | 0.001 | 0.001 | 0.004 | 0.002 | 0.011 | 0.001 | | 0.002 | | |
| Semillon | 0.002 | 0.003 | 0.008 | 0.009 | | 0.051 | | | | |
| Total* | 179.783 | 172.437 | 187.757 | 205.460 | 212.594 | 253.099 | 255.802 | 269.329 | 284.574 | 285.156 |

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

All litre and NZ\$ figures are in millions

Source: Wine Export Certification Service

Wine imports into New Zealand (2012-2021)

| By country of origin | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Australia | 21.897 | 32.565 | 31.958 | 25.668 | 28.715 | 28.517 | 31.527 | 32.118 | 29.795 | 27.427 |
| France | 1.449 | 2.023 | 2.153 | 2.344 | 2.869 | 2.807 | 2.762 | 3.069 | 2.807 | 3.475 |
| Italy | 0.858 | 0.865 | 0.940 | 1.023 | 1.308 | 1.381 | 1.786 | 1.870 | 2.362 | 2.539 |
| Chile | 0.530 | 1.936 | 2.457 | 1.905 | 1.842 | 2.000 | 1.606 | 1.522 | 1.943 | 2.166 |
| South Africa | 1.694 | 2.579 | 1.732 | 1.373 | 1.086 | 1.492 | 1.370 | 1.406 | 0.615 | 2.001 |
| Argentina | 0.082 | 0.112 | 0.161 | 0.229 | 0.212 | 0.223 | 0.265 | 0.917 | 2.084 | 1.001 |
| Spain | 0.311 | 0.430 | 0.518 | 0.641 | 0.578 | 0.716 | 0.557 | 0.654 | 0.955 | 0.692 |
| Others | 0.511 | 0.382 | 1.106 | 1.307 | 0.603 | 1.958 | 1.017 | 0.911 | 1.057 | 1.757 |
| Total | 27.331 | 40.892 | 40.724 | 34.490 | 37.212 | 39.935 | 40.881 | 42.466 | 41.618 | 41.059 |

| By product type | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| White | 7.555 | 16.760 | 17.280 | 11.217 | 14.088 | 18.206 | 21.525 | 21.237 | 20.603 | 18.935 |
| Red | 17.011 | 20.958 | 20.542 | 19.830 | 19.070 | 17.579 | 15.035 | 16.281 | 16.267 | 16.686 |
| Sparkling | 2.008 | 2.079 | 1.849 | 2.268 | 2.632 | 2.651 | 2.904 | 3.317 | 3.415 | 3.839 |
| Champagne | 0.679 | 0.884 | 0.896 | 1.049 | 1.364 | 1.397 | 1.371 | 1.567 | 1.288 | 1.544 |
| Fortified | 0.078 | 0.211 | 0.158 | 0.126 | 0.036 | 0.076 | 0.044 | 0.064 | 0.045 | 0.054 |
| Total | 27.331 | 40.892 | 40.724 | 34.490 | 37.190 | 39.909 | 40.836 | 42.466 | 41.618 | 41.059 |

| Country of origin | | White | Red | Sparkling | Champagne | Fortified | Total |
|-------------------|-----------|--------------------------|---------------------------|-------------------------|-------------------------|------------------------|---------------------------|
| Australia | NZ\$ L | 30.319 13.729 | 67.679 11.589 | 22.154 2.086 | | 1.172 0.023 | 121.324 27.427 |
| France | NZ\$ L | 4.829 0.489 | 15.553 1.326 | 1.765 0.116 | 47.636 1.544 | 0.074 <0.000 | 69.857 3.475 |
| Italy | NZ\$ L | 1.145 0.143 | 7.533 1.084 | 19.745 1.311 | | 0.072 0.001 | 28.495 2.539 |
| Spain | NZ\$ L | 0.444 0.060 | 3.437 0.537 | 1.209 0.091 | | 0.320 0.004 | 5.410 0.692 |
| South Africa | NZ\$ L | 1.702 1.334 | 1.743 0.654 | 0.215 0.013 | | 0.038 0.001 | 3.698 2.001 |
| Chile | NZ\$ L | 1.461 1.547 | 1.512 0.619 | 0.005 <0.000 | | | 2.978 2.166 |
| Argentina | NZ\$ L | 0.606 0.631 | 2.161 0.368 | 0.060 0.002 | | | 2.827 1.001 |
| Others | NZ\$ L | 5.425 1.003 | 3.157 0.510 | 3.690 0.220 | | 0.001 0.001 | 12.273 1.757 |
| Total | NZ\$ L | 45.929 18.935 | 102.774 16.686 | 48.846 3.839 | 47.636 1.544 | 3.615 0.054 | 248.800 41.059 |

All litre and NZ\$ figures are in millions
Source: Wine Export Certification Service

Directory

BOARD MEMBERS

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Nautilus Estate

Fabian Yukich (*Deputy Chair*)
Villa Maria Estate Ltd

Duncan McFarlane
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Misha Wilkinson
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Emma Taylor
Consultant Viticulturist

Melissa Tripe
JTC Viticulture

Michael Henley
Aotearoa New Zealand
Fine Wine Estates

Tim Rose
Rose Ag Ltd

ROLL OF FELLOWS

New Zealand Winegrowers

- 2006 **Ross Spence** QSO
- 2006 **Reid Fletcher**
- 2008 **Tim Finn**
- 2008 **John Webber**
- 2012 **Robin Dicey**
- 2013 **Stuart Smith**
- 2013 **Sir George Fistonich**
- 2014 **Hermann Seifried**
- 2014 **Agnes Seifried**
- 2014 **Richard Riddiford**
- 2015 **Kate Radburn**
- 2015 **Mike Trought**
- 2015 **Alan Brady**
- 2016 **Larry McKenna**
- 2017 **Joe Babich**
- 2017 **Geoff Thorpe**
- 2017 **Bill Spence**
- 2017 **Lorraine Rudelj**
- 2018 **Jane Hunter** CNZM
- 2018 **Ivan Sutherland** MNZM
- 2018 **Mark Nobilo**
- 2019 **Bob Campbell** MW
- 2019 **Steve Green**
- 2019 **Annie Millton**
- 2019 **James Millton** MNZM
- 2020 **Dr Rengasamy Balasubramaniam**
- 2020 **Dr John Forrest**
- 2020 **Alwyn Corban**

Wine Institute of New Zealand

- 1982 **George T Mazuran** OBE, JP
- Bogoslav (Bob) Sokolich**
- Alexander A Corban** OBE, BSc, RD Oen
- Thomas B McDonald** OBE, JP
- 1987 **Mate G Brajkovich** OBE
- 1988 **Peter D Fredatovich** MBE, JP
- 1990 **Mate I Selak**
- 1991 **Joseph A Corban** MBE
- 1992 **Frank I Yukich**
- 1993 **John (Jock) C Graham** MNZM

- 1994 **Robert O Knapstein** RD Oen
- 1995 **Peter J Babich** MBE
- 1996 **Terence J Dunleavy** MBE, JP
- 1997 **Donald M Maisey**
- 1998 **Anthony F Soljan**
- 1999 **John Buck** OBE
- 2003 **Kerry Hitchcock**

ROLL OF HONOURARY LIFE MEMBERS

New Zealand Winegrowers

- 2005 **Ms Margaret Harvey**, MW

Wine Institute of New Zealand

- 1997 **Bryan Mogridge** ONZM, BSc
- 1998 **James S Fraser** B.Food Tech, Dip.Dy
- 1999 **Stanley L Harris** QSM

New Zealand Grape Growers Council

- 1995 **Ross Goodin** ONZM, QM
- 2000 **Kevyn Moore** QSM
- 2004 **Jim Hamilton**
- 2005 **Willie Crosse**

INDUSTRY ORGANISATIONS

New Zealand Society of Viticulture & Oenology

President, Jeff Sinnott
c/o New Zealand Winegrowers

REGIONAL WINEGROWING ASSOCIATIONS

Hawke's Bay Winegrowers Inc.

Sally Duncan (*Chair*)

sally@hawkesbaywine.co.nz

Peter Hurlstone (*Regional Representative*)

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www.hawkesbaywine.co.nz

Marlborough Winegrowers Association Inc. & Wine Marlborough Ltd

Marcus Pickens (*General Manager*)

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Nelson Winegrowers Association Inc. & Wine Nelson

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