AROUND THE WORLD, NEW ZEALAND IS RENOWNED FOR ITS EXCEPTIONAL WINES

OUR MISSION

TO CREATE VALUE FOR OUR MEMBERS

OUR PURPOSE

TO PROTECT THE COMPETITIVE POSITION OF WINE FROM NZ

TO SUPPORT THE PROFITABLE GROWTH OF WINE FROM NZ

OUR ACTIVITIES

ADVOCACY/RESEARCH/SUSTAINABILITY/MARKETING
NEW ZEALAND WINEGROWERS ANNUAL REPORT 2014

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Chairs’ Report

We Are All Winegrowers

Wine is an iconic New Zealand product. It attracts high spending tourists. It enjoys an extraordinary export growth rate year-on-year. It is New Zealand’s leading shelf-stable, consumer-ready product, placing the name of our country and its regions on the lips of millions of consumers worldwide.

A premium reputation is the foundation of New Zealand wine’s iconic status. It is the reason that consumers are willing to pay more on average for New Zealand wine than for almost any other country’s wine. Without those willing consumers, wine production in New Zealand is not an economic proposition.

The reputation of the New Zealand wine industry is inextricably bound to the reputation of our country as a whole. Benefits and risks to the good name of New Zealand are benefits and risks to the good name of New Zealand wine.

As wine moves closer to becoming a $2 billion top-5 New Zealand export industry, the need to support its reputation with increased investment and stronger protections becomes ever more pressing.

Ultimately, every stakeholder in the industry shares an interest in and a responsibility for the premium reputation of New Zealand wine. It is the factor that unites growers, regions, boutique operations and large corporates under a single banner: it is what makes us all winegrowers.

Bounce-Back

Wineries took full advantage of the glorious 2013 vintage to bounce back from the supply constraints of 2012. Both export value and volume experienced a 10% uplift as overseas sales earned an unprecedented $1.33 billion f.o.b. and neared 190 million litres. The average value per litre remained steady at $7.11 for all wine and $8.32 for packaged wine; a solid performance given the deadweight of continued high currency levels.

Australia remains the leading export destination accounting for 53 million litres or 28% of total export volumes. Exporters to this market are well aware that some producers in that part of the world would like to see WET rebate entitlements changed; but that can only happen in accordance with Australia’s international obligations.

North America and Northern Europe are where the fastest growth is happening; USA experienced growth of 16% in the past 12 months and the hub markets of the Netherlands and Germany were up 25% and 52% respectively. China and Hong Kong, on the other hand, have slowed considerably but the potential in these markets is undiminished.

In the domestic market the story was different. While the total market continued to hover around 90 million litres, New Zealand wine sales slipped an estimated 6% as wineries continued to prioritise export markets.

Stocking Up

The highly successful sales year left stocks needing replenishment and even greater demand forecast. A bountiful vintage was needed to fill the tanks and 2014 delivered.

At 445,000 tonnes, the harvest may seem a drop in the ocean compared to our competitors; but it was a record for New Zealand, signalling confidence that there is still a greater market for our wine than we have been able to supply to date.

The “two-speed” growing season got off to a rapid start but slowed in the lead-up to vintage with a run of fine but cool weather in most regions allowing for good flavour development. Late rains brought the season to a close, but quality is generally of a high standard with some standout regions and varieties.

New Zealand Sauvignon Blanc is a must-have category in restaurant and retail listings the world over. Little surprise then that, at 310,000 tonnes, it represented 72% of the total harvest in 2014. Pinot Noir increased production 15% to 36,500 tonnes with significantly larger harvests in all South Island regions. Chardonnay, Pinot Gris and Merlot all increased production 7-8% on the back of strong demand.

On the Move

Strong sales have made wine a star performer. Wine exports now earn more foreign exchange for New Zealand than butter, fin-fish or kiwifruit.

The impetus of the 2014 vintage will very likely take wine to around $1.5 billion in exports during the next...
year. Current growth estimates will see exports climb to $2 billion in exports by the end of the decade, placing wine firmly among the New Zealand’s top 5 traded goods on current figures.

Throughout the post-GFC years, wine has consistently outperformed the government’s Business Growth Agenda. Wine can claim many achievements since 2008:

- Export volumes have more than doubled;
- Export value has increased by 60%;
- Export returns have grown by 8% per annum on average against a national average of 2%;
- A direct contribution to GDP of around $700 million annually;
- Wine tourists spent more than $814 million annually;
- More than 7,700 people have been directly employed on a full time basis.

Throughout this period, investment has focussed predominantly on building markets. Growers and wineries have relentlessly pursued new opportunities in the changed commercial environment. Partnerships with MPI, MFAT and NZTE have been invaluable in helping wineries to get into, and get to grips with, new markets. But the key that has ultimately unlocked those opportunities is the premium reputation of New Zealand wine.

Confidence in those efforts is demonstrated by a lift in vineyard and infrastructure developments in the past 12 months. The industry is on the move once more.

With full tanks and the possibility that some stocks will be carried forward, it is worth repeating the caution from last year’s report. Increases in productive capacity should be based on a clear-eyed assessment of market demand. Wineries need to undertake careful and realistic planning of future production and make decisions that account for growth across the whole industry in the longer-term.

**REPUTATION, REPUTATION, REPUTATION**

All this investment would count for very little without the reputation that New Zealand wine has built up over the years.

The past 12 months have seen some challenges to brand New Zealand and hopefully some lessons learned. From the >

“New Zealand’s successes are undeniable; with industry and export growth galloping ahead year after year... Behind the scenes the New Zealand industry has been focused on exporting wine of high quality rather than trying to lure fans with very cheap prices—as several other countries have done.”

DAVID LAWRAISON, WINEALIGN.COM, CANADA, JULY 5, 2014
perspective of the wine industry, these challenges have underscored the fact that everyone who trades on our national reputation has an obligation to look after it.

Quality and integrity should never be in question. Customers need to be able to rely on the New Zealand name. To break that trust is to undermine the basis of our reputation and our national brand. Now that news and opinions about products can gain the attention of millions in seconds, there is no margin of error. Everything has to be done right every time.

The government has a key role to play in implementing effective regulatory protections. Free-riders should be deterred and rightful users given the ability to protect their investment. We have a world-class system in the Wine Act and have been working with officials to ensure that export controls are suited to a $2 billion industry. Geographical indications also need formal recognition to protect the places that make our wines famous; this is a must-have for the industry.

Social & Sustainable

Sustainability has been a guiding principle for the wine industry for many years; because we care about the physical and social environment in which we live and because our customers expect this from us. 94% of New Zealand’s vineyard producing area is certified by sustainability and/or organic programmes, unmatched by any voluntary scheme around the world.

One of the commitments that New Zealand Winegrowers made to its members last year was to remove the frustrations involved in completing the Sustainable Winegrowing New Zealand scorecard. A redesigned scorecard and a whole new user interface in the form of WiSE has now been rolled out and feedback is strongly positive.

Social sustainability is every bit as important as environmental sustainability. The industry’s major responsibilities in this area relate to its functions as an employer and a producer of alcoholic beverages. These responsibilities are taken very seriously.

Cheers! The strong uptake of voluntary pregnancy advisory labels and the Premium Experiences—Guidelines for Major Wine Events developed in conjunction with the Health Promotion Agency are examples of the industry’s dedication to promoting safe and sociable drinking behaviours. The Primary Growth Partnership research project into lower alcohol and lower calorie wine styles shows that product innovation and social responsibility go hand in hand.

At the same time, new legislation governing the sale and supply of alcohol has implemented major changes that have yet to fully take effect. The vocal clique arguing for even more restrictions on advertising and sponsorship and for excise increases captures much media attention. But such proposals must be considered rationally in light of their dire effect on the economic sustainability of the wine industry and the lack of evidence that they will be in any way proportionate or effective.

Getting Together

Commitment to a premium reputation is a powerful unifying force for the wine industry. It gives growers and wineries a common identity based around quality and authenticity. It is what underwrites the ability of New Zealand Winegrowers to represent the whole industry.
That is why the vision of the national body is for New Zealand wine to be renowned around the world for exceptional wine.

Ensuring that the structure and activities of New Zealand Winegrowers reinforce the unified vision is essential. The Board has been looking very hard over the past 12 months at the governance and representation structures of the national organisation. Some initial options will soon be put to the membership with a view to fulfilling the original 2002 vision of a single industry body. A full and frank consultation process will be undertaken, so make sure that you have your say when the time comes.

**HOW FAR WILL WE GO?**

Once again, vineyards are being planted and wineries are being built. Where is this going to take the New Zealand wine industry?

We will never be one of the giants. Yes, there is scope for exciting new regions and sub-regions to emerge around the country and for existing regions to develop. Nevertheless, Marlborough, the engine of the export trade, will reach the limit of viable vineyard land at some point. And our cool climate will always enforce its harsh discipline on those who would drive us down the low-cost, high-production pathway.

We can, however, be among the most sought after and highly valued. That is our best future; but it is not an inevitable future. It demands that we offer our customers the comfort of knowing our products will always be good and honest, the satisfaction that they will always tell an interesting story, and the status of purchasing something unique and innovative.

Consistently meeting consumer expectations for premium New Zealand wines will take us a long way.

“I’m impressed. My tastings of New Zealand wines throughout 2013 was the most exciting year of reviewing this country so far; the wines just get more and more compelling… I don’t think there is a wine nation in the world that has qualitatively progressed its wine offering as quickly as New Zealand.”

**LISA PERROTI-BROWN, WINE ADVOCATE, OCTOBER 31, 2013**
## Member Survey Results Summary

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

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### How well informed do you feel about New Zealand Winegrowers and its activities?*

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### How do you value the following services offered by NZW?*

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<thead>
<tr>
<th>Service</th>
<th>Rating</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Advocacy</td>
<td>4.31</td>
<td>6%</td>
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<tr>
<td>Marketing</td>
<td>4.23</td>
<td>4%</td>
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<tr>
<td>Research</td>
<td>4.08</td>
<td>7%</td>
</tr>
<tr>
<td>Sustainability</td>
<td>4.25</td>
<td>1%</td>
</tr>
<tr>
<td>Funding regional organisations</td>
<td>4.39</td>
<td>1%</td>
</tr>
<tr>
<td>User-pays: Events</td>
<td>4.47</td>
<td>1%</td>
</tr>
<tr>
<td>User-pays: Sustainable Winegrowing New Zealand</td>
<td>3.68</td>
<td>1%</td>
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<tr>
<td>WECS (funded by Govt)</td>
<td>4.46</td>
<td>1%</td>
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### How do you value the information you receive from NZW (e.g. industry KPI snapshots, labelling guides, spray schedules, market data etc)?*

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### Do you consider the grape price data published by NZW useful?*

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<td>1%</td>
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<td>4%</td>
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### How do you value New Zealand Winegrowers personnel in terms of:*

<table>
<thead>
<tr>
<th>Quality</th>
<th>Rating</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Integrity</td>
<td>4.61</td>
<td>4%</td>
</tr>
<tr>
<td>Knowledge</td>
<td>4.61</td>
<td>4%</td>
</tr>
<tr>
<td>Professionalism</td>
<td>4.83</td>
<td>1%</td>
</tr>
<tr>
<td>Responsiveness</td>
<td>4.79</td>
<td>1%</td>
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### How well do you believe the NZW Board represents the interests of your industry?*

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<td>8%</td>
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### How do you feel about your involvement with NZW and its activities?*

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<tr>
<th>Opinion</th>
<th>Rating</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>I don’t want to be involved</td>
<td>4.20</td>
<td>4%</td>
</tr>
<tr>
<td>I don’t know how to be involved</td>
<td>4.20</td>
<td>4%</td>
</tr>
<tr>
<td>I’m as involved as I want to be</td>
<td>4.20</td>
<td>4%</td>
</tr>
<tr>
<td>I want more opportunities to be involved</td>
<td>4.20</td>
<td>4%</td>
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NZW is funded by grape and wine levies (apart from any user-pays funding). Considering the levy you pay and the value you receive in return, is your payment?

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<thead>
<tr>
<th>Payment</th>
<th>Rating</th>
<th>Percentage</th>
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<tr>
<td>Too high</td>
<td>15%</td>
<td>4%</td>
</tr>
<tr>
<td>About right</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>Too little</td>
<td>66%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Considering the future for your business and the wine industry as a whole, and the service you require from NZW, in the future would you prefer to pay?

<table>
<thead>
<tr>
<th>Service</th>
<th>Rating</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Less levy for fewer services</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>About the same</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>More levy for additional services</td>
<td>1%</td>
<td>1%</td>
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*Average rating
**MOST UNWANTED**

**IN THE VINEYARD: FUNGI, BACTERIA, INSECT, PHYTOPLASMA**

**Grapevine Leaf Rust (Phakopsora euvitis)**
- Affects grapevines, small dark spots appear on the upper surface of grapevine leaves. This is followed by the formation of year-long yellow, powdery spots on the underside of mature leaves. Infected leaves may fall prematurely.
- Spores can be spread through wind and air currents.
- Can completely destroy entire crops.
- Often controlled by fungicide sprays.

**Black Rot (Disearia bidwellii)**
- Affects flowers, leaves, roots, stems. Black rot of grapevines can cause severe loss and can be very destructive.
- Symptoms include cankers on stems and petioles, by necrotic foliar spots and by bud death.
- Spread can occur via propagating material, grafting & grapevine that can lead to serious harvest losses.
- Bacterial necrosis of grapevines is characterized by typical symptoms such as necrosis, which is followed by the formation of small dark spots on the leaves.
- Spores can be spread through wind and air currents.
- Often controlled by fungicide sprays.

**Phytoplasma**
- Impacts include reduced vitality of vines, yield reductions, and reduced wine quality due to high acid and low sugar contents of fruit from infected plants.
- Highly contagious quarantine disease that can spread rapidly, become systemic, and can infect Alphonso lines.
- Spores can be spread through wind and air currents.
- Often controlled by fungicide sprays.

**Glassy winged sharpshooter**
- A large hemiptera that obtains its nutrients by feeding on plant fluids.
- A stem feeder and transmits various viruses by feeding on other vines.
- Symptoms include loss of vine vigour and fruit rots.
- Attacked fruit show signs of vesicles (blisters) and the presence of small white spots.
- Much damage may occur inside the fruit after ripening.

**Dorsophila suzukii** (Spotted wing drosophila)
- Larval feeding of early instars causes the fruit to collapse around the oviposition scar, and if attack rates are high the entire fruit can collapse.
- Drosophila species have been implicated as vectors of plant pathogenic fungi and bacteria.
- Larval feeding can cause damage to the fruit.

**Vine mealybug (Planococcus ficus)**
- Vine mealybugs are small (adults are about 3mm long), soft-bodied insects that feed on plant fluids.
- Feeding can cause damage to the fruit.

**Omnivorous leafroller (Platyntema stultana)**
- The caterpillar feeds on the leaves, flowers and developing berries of grapes.
- Platynota stultana can be a serious pest of vineyards.
- The most significant damage is to grapevines after the onset of ripening when feeding allows secondary pathogens to enter the fruit at the damage site.
- Feeding caterpillars cause loss of yield and reduced fruit quality as a result of fruit rots.

**Bacterial leaf blight (Xanthomonas ampelina)**
- Affects flowers, leaves, roots, stems, and fruit.
- This disease can cause severe loss and can be very destructive.
- Symptoms include cankers on stems and petioles, by necrotic foliar spots and by leaf blight.
- Symptoms can be controlled by fungicide sprays.

**Pseudoisculus spp. (Angular leaf scorch)**
- Affects grapevines, small dark spots appear on the upper surface of grapevine leaves.
- This is followed by the formation of year-long yellow, powdery spots on the underside of mature leaves.
- Infected leaves may fall prematurely.
- Can completely destroy entire crops.
- Often controlled by fungicide sprays.

**01 GLASS IS LIFE**

**IF SEEN - NOTIFY MPI EXOTIC PEST & DISEASE HOTLINE IMMEDIATELY: 0800 80 99 66**

**www.nzwine.com**
ADVOCACY MISSION: PROTECTING MEMBERS’ ABILITY TO PRODUCE, MARKET AND SELL COMPETITIVELY

KEY INITIATIVES AND RESULTS

Protecting members’ ability to produce, market and sell competitively is the objective of the Advocacy team. Our activities are centred around: engagement with government; suitable standards for product integrity; protection of intellectual property; free and fair trade and promotion of social responsibility.

The past 12 months have seen a number of successes including securing market access for organic wines into the European Union and lower licensing fees for cellar doors. At the same time, they have thrown up challenges such as the new and unclear rules around promotions.

Hard-won progress has been made on the major priority projects: protection of geographical indications and traceability for bulk wine exports. We look forward with optimism to decisive developments on these matters in the coming year.

ENGAGEMENT

The opening of a Wellington office and the employment of an External Relations Manager marked a major step forward for our relationships with government. As a major and still growing export industry, it was time for a permanent presence in Wellington.

New initiatives include a programme of field trips in Wairarapa and Marlborough with officials designed to build mutual understanding between officials and industry.

We are in constant contact with officials over wine-specific issues and also participate in wider discussions on broad-based issues such as free trade agreements.

STANDARDS

The growth of our industry depends on maintaining the reputation of New Zealand wine as a premium product. New urgency has been given to the ongoing review of wine export legislation as a result of the Whey Protein Concentrate contamination affair. New Zealand Winegrowers is working with government to identify the tools available both under existing legislation and in the future to manage risks associated with bulk wine exports and system integrity. The upgrade to the outdated WEC’s IT platform has also progressed apace and will be rolled out late 2014.

The Customs and Excise system is under review and New Zealand Winegrowers is making sure government has the best information to understand how it impacts on our members, particularly given changing business models for producing and distributing wine.

A close eye has also been kept on the review of the Food Standards Code and the development of the Food Act 2014 as well as several other regulatory developments to make sure that they do not cut across the interests of our members.

INTELLECTUAL PROPERTY

New Zealand Winegrowers has continued to push for the implementation of geographical indications legislation as a priority. A work programme has been agreed by government and we expect a final decision to be made before the end of 2014. We also succeeded in defeating the attempt by an offshore company to register a trade mark that conflicted with the South Island GI.

SOCIAL RESPONSIBILITY

We continue to step up our efforts to encourage socially responsible practices among our members and to ensure that the industry’s voice is heard in the national debate on harmful consumption of alcohol.

In collaboration with the Health Promotion Agency, we produced Premium Experiences — Guidelines for hosting safe and successful large scale wine events. We also celebrated a successful first year for the Cheers! initiative including highly successful “standard drinks” and website promotion campaigns.

Regulations under the Sale and Supply of Alcohol Act formally recognised winery cellar doors as the core activity areas.
as being very low risk and set the fees at the lowest level. Uptake of pregnancy advisory labels, as recommended by New Zealand Winegrowers, has been strong. This was instrumental in an extension of the voluntary timeframe for adopting such labels. However, difficulties with special licence fees and with interpreting the new restrictions on advertising and promotion continue to plague wineries.

**TRADE**

A number of long-running initiatives have borne fruit this year. The USA and Canada ratified the World Trade Group Labelling Agreement meaning that exporters now have two options for front labels that can be used across all major markets. The efforts to achieve equivalence for organic wine entering the European Union paid off, with the European Parliament signing off on the law change in June this year.

The long and complicated job of building regulatory platforms for the acceptance of wines made to New Zealand standards in all markets continues, with multiple initiatives being played out in the WWTG, OIV, Codex Alimentarius, FIVS and APEC. We have also continued to advocate for improved market access for wine in the many ongoing free trade negotiations in which New Zealand is involved.

**SUBMISSIONS**

New Zealand Winegrowers made or contributed to direct formal submissions or written policy proposals on the following matters:

**INTERNATIONAL**

- International Organisation for Vine and Wine (OIV) (March & June 2014)
- Codex Alimentarius Committee on Food Additives (March 2014)
- WHO Revised Draft Action Plan on Non Communicable Diseases (ongoing)
- UN High Level Review of Non Communicable Diseases (July 2014)

**DOMESTIC**

- Sale and Supply of Alcohol Act Regulations (November 2013)
- Local Alcohol Plans (ongoing)
- Development of a National Drug Policy for New Zealand (March 2016)

**TRADE**

- Trans-Pacific Partnership Free Trade Agreement (ongoing)
- Russia-Kazakhstan-Belarus Free Trade Agreement and technical regulations (ongoing)
- Regional Closer Economic Partnership Free Trade Agreement (ongoing)
- EU Organic Wine Equivalence (ongoing)
- Ministerial Forum on the Review of Alcohol Advertising and Sponsorship (May 2014)
- Dairy Traceability Working Group (May 2014)
- Review of Export Legislation (ongoing)
- Geographical Indications (Wines and Spirits) Act Implementation (ongoing)
- Review of Wine Export Legislation (ongoing)
- Cost Benefit Analysis of Energy Labelling (ongoing)
- Review of Pregnancy Advisory Labelling (ongoing)
- Development of Wine eCert Platform (ongoing)

**INTERNATIONAL MEETINGS 2013-14**

- APEC Wine Regulators Forum, Washington DC, USA
  4 November - 5 November 2013
- OIV Expert Group Meetings, Paris, France
  24 March - 4 April 2014
- FIVS Autumn Congress, Toronto, Canada
  11 November - 12 November 2015
- FIV General Assembly and Spring Congress, Brussels, Belgium
  7 April - 9 April 2014
- WWTG Inter-sessional meeting, Brussels, Belgium
  9 April - 10 April 2014

“The best New Zealand wines...are now truly in a league all their own. And unlike their European counterparts, New Zealand’s best wines display fair price tags for the level of quality you get.”

**ERIC ARNOLD, AFTERTASTE, USA, APRIL 2, 2014**
RESEARCH MISSION: BUILDING A KNOWLEDGE PLATFORM THAT PROTECTS MEMBERS’ ABILITY TO PRODUCE EXCEPTIONAL WINES AND SUPPORTS INNOVATION

The New Zealand Winegrowers research strategy focuses on five main areas:

- PESTS AND DISEASES
- REDUCING COSTS, INCREASING PROFITABILITY
- SUSTAINABILITY AND ORGANICS
- QUALITY WINE STYLES FOR EXISTING AND DEVELOPING MARKETS
- TECHNOLOGY TRANSFER

The future of the New Zealand wine industry relies on research leading to technical innovation that will enable grape growers and winemakers to remain internationally competitive as leading producers of premium quality wines.

QUALITY WINE STYLES FOR EXISTING AND DEVELOPING MARKETS

PGP: A Primary Growth Partnership (PGP) between New Zealand Winegrowers, grape growing and winemaking companies and the Ministry for Primary Industries (MPI) was approved by the government in November 2013. The goal is to drive research to position New Zealand as the home of high-quality, lower alcohol wines as well as underpinning many other wider research questions in the wine sector. The PGP programme, which officially began in March 2014, has a total investment of nearly NZ$17 million over eight years, making it the largest R&D effort ever undertaken by the wine industry.

PEATS AND DISEASES

Botrytis report: Botrytis bunch rot is a perennial challenge to the wine industry despite having been the subject of ongoing research for decades. New Zealand Winegrowers commissioned Ruby Andrew and Trevor Lupton to write Understanding Botrytis in New Zealand Vineyards to provide a summary of scientific research findings and current ‘best practice.’ The book was officially launched at the Romeo Bragato Conference in 2013, and copies were sent to all members in early September.

REDUCING COSTS, INCREASING PROFITABILITY

Winning with thinning: The mechanical thinning project (co-funded by MPI’s Sustainable Farming Fund) concluded in June 2014, following a spectacular final season of trials. In a year in which crop thinning figured prominently, machine thinning was trialed across approximately 2,500 hectares in Marlborough. During vintage, 70 different sites in the region were assessed for botrytis; in every instance botrytis severity on mechanically thinned vines was at least half that of the control vines. Results, which were reported at this year’s Grape Day events, included the first report on commercial winemaking trials using machine-thinned grapes. This research add another important tool for vineyards to manage crop yields and botrytis.

SUSTAINABILITY / ORGANICS

New endeavours: A Science & Innovation Partnership proposal has reached the final stages of assessment with the Ministry of Business, Innovation & Employment (MBIE). New Zealand Winegrowers, Plant & Food Research Ltd and University of Auckland propose to sequence and evaluate the presence, activities and functions of organisms

THE FUTURE OF THE NEW ZEALAND WINE INDUSTRY RELIRES ON RESEARCH LEADING TO TECHNICAL INNOVATION.
within the vineyard, with a view to developing new management practices that minimise synthetic chemical use.

TECHNOLOGY TRANSFER

Grape Days: Now in their sixth year, the New Zealand Winegrowers Grape Day events have gone from strength to strength, providing an increasingly important channel for technical transfer. The 2014 events, once again held on the North and South Islands, attracted more than 450 attendees. Designed to combine high-level technical summaries with a practical applied focus, the events are also recorded, so that information can be made available to members on the New Zealand Winegrowers website.

Industry research investment managed through New Zealand Winegrowers is consistently leveraged over and above the direct contribution from membership levies. Direct levy investment enables us to establish research priorities and project proposals that, in turn, attract funding contributions from other sources, including government and Crown Research Institutions (CRI’s). These collaborations provide the means for comprehensive depth and breadth of exploration, enhancing our industry’s ability to assess and implement technical innovation. This leverage creates an overall research programme that is of a critical mass to enable significant research activity in the wine sector that underpins many other important functions such as the Sustainability programme and our ability to respond to significant bio-security threats.

PROJECTS FUNDED, RESEARCH REPORTS, ARTICLES, FACT SHEETS PUBLISHED OVER 2013/2014

PROJECTS FUNDED

The pathway of volatile sulphur compounds in wine yeast — The Bragato Trust and NZW Scholarship
University of Auckland — (Dr Bruno Fedrizzi / student Malia Kinzurk)

Literature review of grape and wine anthocyanins and phenolics to give viticulturists and winemakers knowledge
Lincoln University (Roland Harrison)

Preliminary investigation of factors responsible for variability in tartaric acid additions to Pinot noir
Lincoln University (Roland Harrison)

Influence of juice pH on thiol production
Plant and Food Research (Claire Grose)

Identification of natural genetic variation in grapevine contributing to pathogen resistance
Lincoln University (Chris Winifield)

The pathway of volatile sulphur compounds in wine yeast — The Bragato Trust and NZW Scholarship
University of Auckland (Dr Bruno Fedrizzi / student Malia Kinzurk)

Virus diversity in New Zealand grapevines: sequence, ecology and impact — The Rod Bonfiglioli Scholarship
Plant and Food Research (Dr Robin MacDiarmid / student Arnaud Blouin)

Sector weather data licence & tools
HortPlus (NZ) Ltd.

Organic Focus Vineyard Project
Organic Winegrowers New Zealand (Rebecca Reider) Supported by MPI Sustainable Farming Fund

Effects of undervine vegetation management on grape quality, vine performance, grape composition, and soil properties
Eastern Institute of Technology (EIT) (Mark Krasnow)

New opportunities for sustainable grape thinning
Plant and Food Research (Mike Trought) Supported by MPI Sustainable Farming Fund

Reduced berry size and Botrytis tolerance through trauma to the vine
Plant and Food Research (Mike Trought)

Sensory effects of defoliation timing and method on Sauvignon blanc, Cabernet sauvignon, Chardonnay and Merlot K Lusk — University of Otago and M Kraus — Eastern Institute of Technology (EIT)
The Organic Focus Vineyard Project — The story of vintage 2013

Botrytis decision support (BDS) industry training & botrytis sampling protocols: Supplementary report
R Beresford et al. Plant and Food Research

Review of grapevine trunk and root diseases in New Zealand 2013
D Mundy and K Clapperton — Plant and Food Research

Understanding causes of slip skin: final report
R Beresford, D Mundy and P Wood — Plant and Food Research

Tools for manipulating Sauvignon blanc wine flavour and aroma: Harvest and Processing of grapes
C Grose et al. Plant and Food Research

Reduced berry size and Botrytis tolerance through trauma to the vine: Annual report 2013
M Trought et al. Plant and Food Research

New opportunities for sustainable grape thinning: disease technical report 2013
D Mundy et al. Plant and Food Research

New opportunities for sustainable grape thinning: Interim report, end of year 2
M Trought et al. Plant and Food Research

Sustainable virus-free vineyards: replants and beyond: Hawke’s Bay and Marlborough Interim report, 2013
V Bell et al. Plant and Food Research

Implementation of Virus Elimination Strategy
Various (Nick Holsgrove — Project Manager) Supported by MPI Sustainable Farming Fund

Virus diversity in New Zealand grapevines: sequence, ecology and impact — The Rod Bonfiglioli Scholarship
Plant and Food Research (Dr Robin MacDiarmid / student Arnaud Blouin)

Influence of juice pH on thiol production — annual report
C Grose et al. Plant and Food Research

Investigation of perceived minerality in white wine: Sensory and chemical characterisation
W Parr — Lincoln University

REPORTS

Influence of juice pH on thiol production — annual report
C Grose et al. Plant and Food Research

Investigation of perceived minerality in white wine: Sensory and chemical characterisation
W Parr — Lincoln University

Sensory and chemical characterisation
W Parr — Lincoln University
Manipulation of methoxypyrazine concentrations in Sauvignon blanc wine through leaf and rachis additions
C Grose et al. Plant and Food Research

AWRI CMC Benchmarking Trial
T Tran et al. Australian Wine Research Institute (AWRI)

The effect of harvesting method and skin contact on the extraction of unstable proteins
R Harrison — Lincoln University

Chinese Consumers' preferences and attitudes to wine: Review of literature including Chinese Language Publications
D Sun-Waterhouse and B Clapperton — Plant and Food Research

New opportunities for sustainable grape thinning
C Grose et al. Plant & Food Research

Reduced berry size and botrytis tolerance through trauma to the vines
M Trought — Plant & Food Research

Manipulation of methoxypyrazine (MP) concentrations in Sauvignon blanc wine through leaf and rachis additions
C Grose et al. Plant & Food Research

Influence of juice pH on thiol production
C Grose et al. Plant and Food Research

How does CMC behave in NZ wines?
T Tran and E Wilkes — The Australian Wine Research Institute (AWRI)

Harvesting method and grape processing affect bentonite required for protein stabilisation of Marlborough Sauvignon blanc
R Harrison et al. Lincoln University

Sustaining vineyards through practical management of grapevine trunk diseases
M Sosnowski — South Australian Research & Development Institute (SARDI)

Critical recommendations emerging from ‘sustainable virus-free vineyards: replants and beyond’
Y Bell and J Walker — Plant and Food Research

Chinese consumers’ preference
D Sun-Waterhouse et al — Plant and Food Research

Grapevine trunk and root diseases in New Zealand: Our knowledge base in 2013
D Mundy et al. Plant and Food Research

Implementing the Botrytis decision support models
R Beresford — Plant and Food Research

New opportunities for sustainable grape thinning
M Trought et al. Plant and Food Research

Reduced berry size and Botrytis tolerance through trauma to the vine
M Trought et al. Plant and Food Research

The pathway of volatile sulphur compounds in wine yeast
M Knezuk, R Gardner and B Fedrizzi – Auckland University

Progressing management of grapevine trunk diseases
M Sosnowski – South Australian Research & Development Institute (SARDI)

Manipulation of methoxypyrazine concentrations in Sauvignon Blanc wine using leaf and rachis additions
C Grose et al. Plant and Food Research

Virus diversity in New Zealand grapevines: sequence, ecology and impact
A Blouin, H Ross, R MacDiarmid — Plant and Food Research and Auckland University

Influence of juice pH on thiol production
C Grose et al. Plant and Food Research

FACT SHEETS
Mapping Leafroll Virus
New Zealand Winegrowers

Pre-Harvest mealybug monitoring
Plant and Food Research

Testing white varieties for Leafroll 3
Plant and Food Research

Black foot in vineyards
M Jaspers — Lincoln University

Black foot in grapevine nurseries
M Jaspers — Lincoln University

Botryosphaeria dieback in vineyards
M Jaspers — Lincoln University

Botryosphaeria dieback in grapevine nurseries
M Jaspers — Lincoln University

Esca disease in vineyards
M Jaspers — Lincoln University

Eutypa dieback in grapevines
M Jaspers — Lincoln University

Managing powdery mildew
P Magarey et al. Magarey Plant Pathology

Bentonite fining for protein stability
R Harrison — Lincoln University

Optimising amino acids in Sauvignon blanc
B Jordan and S Gregan — Lincoln University

Optimising flavonoids in Sauvignon blanc
B Jordan and S Gregan — Lincoln University

Optimising methoxypyrazines in Sauvignon blanc
B Jordan and S Gregan — Lincoln University
A core function of New Zealand Winegrowers is the provision of up-to-date information delivered in a timely manner to both members and a wider trade and consumer audience. In addition to the abundance of information and reports downloadable from the Members’ Website 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 for international retail staff. A monthly newsletter is also emailed directly to all members and the informative New Zealand Winegrower magazine is distributed bi-monthly.
SUSTAINABILITY MISSION: 
TELLING THE NEW ZEALAND 
SUSTAINABILITY STORY AND 
BUILDING SUSTAINABILITY CREDENTIALS

TELLING THE SUSTAINABILITY STORY
Telling the sustainability story is increasingly important. Over the last year New Zealand Winegrowers (NZW) has hosted four media visits with a singular focus on sustainability:

- Sally Easton MW — freelance journalist, UK
- Lily Lu and Bruce Yuanyue Bi — National Geographic Traveler, China
- Terry Mulligan — Tasting Room broadcaster, Canada
- Sandy Taylor — journalist, blogger, educator, USA

The visitors have ranged in their interests from sustainable winemaking and viticultural practises, through to wider lifestyle stories about sustainability in New Zealand. The visitors have been impressed with the general commitment to sustainability in New Zealand and have begun to publish their findings in the international media.

Proactive PR in key markets has supported the sustainability visitor programme resulting in an increase in media coverage on the industry’s sustainability practices. Over 25 articles commending New Zealand’s commitment to sustainability were published this year.

BUILDING SUSTAINABILITY CREDENTIALS
Sustainable Winegrowing NZ is recognised as one of the first and world leading sustainability programmes in the international wine sector. The path towards sustainability was forged by the far-sighted thinking of New Zealand grape growers and wineries 20 years ago. The market’s interest in sustainability is rapidly evolving, which requires us to have systems that can adapt to change, including Sustainable Winegrowing NZ.

This year major changes have been implemented culminating in the launch of an entirely new platform for Sustainable Winegrowing; WiSE, the Wine Industry Sustainability Engine. WiSE is a major step forward in information management and reporting for growers and wineries.

A significant change to Sustainable Winegrowing under WiSE is the division of the scorecard into compulsory and voluntary questions. Compulsory questions establish the minimum requirements to meet internationally agreed sustainability standards, whereas voluntary questions provide information for members to compare their efficiency with similar producers. Importantly WiSE allows Sustainable Winegrowing to move away from a one size fits all approach. It creates the potential to deliver an extended programme for those who wish to push the boundaries of sustainable production and receive recognition for doing so.

BIOSECURITY
Helping protect approximately $5b worth of vineyard plantings is a task NZW takes very seriously and managing biosecurity on behalf of the industry is a priority. This year a study was commissioned to better understand the major pest and diseases risks for our industry. The pathways for introduction were assessed along with analysis of their likely impact and possible strategies for elimination should they arrive. The comparative costs of living with introduced new pest vs. undertaking an eradication programme were modelled to provide better understanding of how the sector should engage in biosecurity management. Based on these studies NZW have
decided to consult with industry on entering into the newly established Government Industry Agreements for joint management of biosecurity readiness and response.

Part of the sector’s preparation for responding to biosecurity incursions is being able to locate each and every vineyard in New Zealand. The 2013 Vineyard Register has expanded to 2052 vineyards providing much improved data for industry planning including biosecurity preparedness.

**SUPPORTING ORGANIC GROWTH**

NZW has a close working relationship with Organic Winegrowers of New Zealand (OWNZ).

The focus vineyard project, entering its final year, continues to provide valuable insights for those working on transition to organic production. The project has provided detailed summaries of the experiences of vineyards converting to organics production in three regions. A joint project with NZW and OWNZ has been working with the Ministry for Primary Industries and organic certifiers to ensure recognition of New Zealand organic standards in our key markets. Gaining recognition or official equivalence is vital to the ongoing access of organically certified wines into our international markets.

**SUSTAINABILITY RESOURCES**

- National energy report
  New Zealand Winegrowers
- National water report
  New Zealand Winegrowers
- Individual member energy & water use reports
  New Zealand Winegrowers
- Energy efficiency action sheet (x2)
  New Zealand Winegrowers
- Biosecurity report (part 1 and 2)
  New Zealand Winegrowers & Market Access Solutionz
- ‘The Power of Green’ sustainability articles
  New Zealand Winegrowers & Emma Jenkins MW
- Workshop videos improving spray application practices
  New Zealand Winegrowers
- WISE Guides and Videos
  New Zealand Winegrowers
- WISE workshops
  New Zealand Winegrowers
- Workshop videos improving spray application practices
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  New Zealand Winegrowers

“Sustainable Winegrowing New Zealand demonstrates the country’s outstanding commitment to securing a socially responsible, economically viable and environmentally sound future... When compared to the rest of the world, New Zealand’s country-wide commitment [to sustainability] is quite extraordinary!”

SANDRA TAYLOR, WWW.SUSTAINABLEBIZINTL.COM, JULY 2014
Deepening the understanding of New Zealand wine amongst trade, media and educator influencers is central to the Marketing activity. We develop strong relationships with these influencers, bringing them to New Zealand and inspiring them to write articles or carry out education for us in their home country. This is supported with high quality collateral and websites to create consistent messages about New Zealand’s premium, sustainable and diverse wines. In addition we enhance strategy development and our members’ insights with market information.

The levy-funded Marketing Programme is focused on:

- North America, i.e. USA and Canada
- Asia, in particular China, Hong Kong, Singapore and Japan
- Mainland Europe
- UK
- Australia

Partnerships are key to our strategy. In May 2014 New Zealand Winegrowers (NZW) and Air New Zealand announced a Memorandum of Understanding to actively promote New Zealand as a destination for wine tourism with both committing to work together on a range of initiatives to promote New Zealand wine in both North America and Asia. In addition NZW is working with Tourism New Zealand in a more coordinated manner to leverage off each other and to gain efficiency and extend marketing reach. A first result has been the creation of Wine Tourism as a designated Special Interest by Tourism NZ.

The partnership with New Zealand Trade and Enterprise goes from strength to strength with projects focused on China and Mainland Europe generating strong results this year and exciting plans established for the year ahead.

Other significant achievements over the past year included:

- Hosting 77 influencer visitors to New Zealand, which included 30 co-funded by NZTE. In total 26 came from Asia, 9 from Northern Europe, 13 from USA, 4 from Canada, 10 from Australia and 15 from UK/Ireland. 825 visits were conducted to wineries and regional bodies. To date, visitors from this current year have already generated coverage with print circulation and viewer/listener figures of almost 59 million, with an equivalent advertising value of approximately NZ$3.6 million.
- Developed a 10 year major events strategy to encompass key varietal and regional events including Pinot Noir and Sauvignon Blanc. This strategy ties these corner-stone events to our inbound visitor and in-market education programmes.
- Organised 74 educational tastings around the world on our key regions and varietals attended by over 4,600 trade and media influencers tasting over 500 different wines.
- 112 candidates graduated from four Advanced Certificate in New Zealand wine courses in Beijing, Shanghai, Guangzhou and Hong Kong. This two day intensive course was developed with Bob Campbell MW and NZTE.
- The NZW America’s Cup leverage programme supported by NZTE in San Francisco in summer 2013 was awarded a Certificate of Honor by Edwin M. Lee, Mayor of San Francisco.
- #SauvBlanc day in May 2014 generated 34 million impressions on Twitter for our signature varietal aided by NZ wine events in Blenheim, Melbourne, Hong Kong, London, Toronto, New York and a tasting at Twitter HQ in San Francisco.
- Six feature promotions with Liquor Boards in Canada (a record).
Increased press coverage for New Zealand wines in Germany, Sweden and Netherlands and the launch of a German website as a result of the joint NZW/ NZTE wine programme.
Continued strong support from anchor sponsors of New Zealand Winegrowers activities: Air New Zealand, O-I New Zealand and JF Hillebrand.
10 Guides to Market produced on our key export markets.

### LIST OF VISITORS TO NEW ZEALAND INCLUDING NZTE VISITORS

#### VISITOR ROLE/ORGANISATION/ PUBLICATION

#### ASIA

**China**
- **Mr Jie Zhang (Michael)** Sommelier, Langham Xintiandi Hotel
- **Mr Jun Shi (Jason)** Assistant Food & Beverage Manager, China World Hotel
- **Mr Wei han Zheng (Grace)** Wine Educator and Freelance Writer, Fine Wine and Liquor magazine
- **Ms Yingji Lai (Grace)** General Manager, Ausino Centre for Wine Education & Publications
- **Mr Wai Man Lau (Ronny)** Freelance Writer and Chairman of the Greater China Wine Critics Association
- **Mr Jerry Liao** Chief Sommelier, Jing An Shangri-La Hotel, Shanghai
- **Mr Min Zhang (Adrian)** Chief Sommelier, Park Hyatt Hotel, Shanghai
- **Mr Wei Zhou (Oliver)** Wine Writer and Journalist, Deputy Editor-in-Chief, Vinehoo.com, Shanghai
- **Ms Yanni Wu (Yanni)** General Manager, Wine100, Shanghai
- **Ms Ying Guo** Chief Sommelier, Four Seasons Hotel Pudong, Shanghai
- **Sohu.com** Chinese Internet TV company
- **Li Lu and Yuanyue Bi** National Geographic Traveler, China
- **Food & Wine Magazine** Food & Wine Magazine, China
- **Mr Eddy Shi (Wenjia Shi)** Sommelier, Fairmont Peace Hotel, Shanghai
- **Mr Kobe Hou (Tielin Hou)** Beverage Manager / Sommelier, Kerry Hotel, Pudong
- **Mr Zane Zhao (Yuancia Zhao)** Sommelier, House of Roosevelt, Bund 27 Shanghai
- **Ms Sylvia Liu (Ling Liao)** Wine Educator at AWSEC (Asia Wine Service & Education Centre and Freelance Wine Writer
- **Ms Ye (Young) Shi** Co-founder and chief educator, Tastefan, writer for www.ajansirobinson.com and international wine judge
- **Mr Zhengyi (Johnny) Guo** Chief Sommelier, Ritz-Carlton Shanghai Pudong
- **Ms Xiaojuan (Cherry) Zhao** Wine Writer, Sommelier, Journalist & Editor-in-Chief, www.wine.cn
- **Ms Nan (Nancy) Pan** Wine Writer for www.wines-info.com

**Japan**
- **Tomoko Ebisawa** Editor/ writer Vinotheque Magazine

#### USA

- **Bernie Sun** Corporate Beverage Director at Jean-Georges Vongerichten’s four-star international restaurant group
- **Dave McIntyre** Wine columnist for The Washington Post and freelance wine and food writer
- **Dan Berger** Publishes Vintage Experiences, contributes to San Francisco Chronicle, Decanter, Robb Report, Beverage Dynamics, Cheers etc
- **Lauren Mowery** Freelance wine writer, The Village Voice, Fodors, Savor
- **Will Costello** Wine Director, Mandarin Oriental, Las Vegas
- **Joshua Thomas** Wine Director, Prospect Restaurant
- **Christopher Bates MS** MS, Chief, writer, consultant and educator
- **W. Blake Gray** Freelance writer, Winessearcher.com, LA times, plus other
- **MaryAnn Worobiec** Senior Editor and Senior Tasting Coordinator for Wine Spectator
- **Rebecca Murphy** Freelance Wine Writer, Wine Reviewer, Founder and Producer of The Dallas Morning News and Texsom Wine Competition
- **Jaime Smith** Sommelier, Educator and Wine Buyer for the Charlie Palmer Group in Las Vegas
- **James Tidwell MS** Beverage Manager and Sommelier at Four Seasons Resort and Club, Texas, plus co-founder of Texsom
- **Sandra Taylor** Writer / Educator on Sustainability www.SustainableBiocntl.com

#### Canada

- **DJ Kearney** Sommelier Instructor, wine writer and wine judge
- **Kim Giesbrecht** Portfolio Manager, BCLDB
- **Chris Waters** Vines Magazine Editor
- **Terry Mulligan** Radio Broadcaster, www.tastingroomradio.com
- **Jim Williuk** winner Winnipeg wine Festival Auction, Sobeys Director

#### Europe

- **Jurgen Roder** Wine columnist for Handelsblatt Newspaper
- **Romana Echensperger** MW, former sommelier, consultant to restaurants and wine writer (Falstaff Magazine, various newspapers)
- **Caro Maurer** Feinschmecker, Vinsum, Fine magazines
- **Peter Moser** Writer, Falstaff Magazine

**MARKETING 17**
### List of Visitors to New Zealand Including NZTE Visitors (Continued)

<table>
<thead>
<tr>
<th>Visitor</th>
<th>Role/Organisation/Publication</th>
</tr>
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<tbody>
<tr>
<td><strong>Finland</strong></td>
<td></td>
</tr>
<tr>
<td>Karina Tihonen</td>
<td>Wine Buyer, Ako inc.</td>
</tr>
<tr>
<td><strong>Netherlands</strong></td>
<td></td>
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<tr>
<td>Edwin Raben</td>
<td>Sommelier Consultant and wine writer for Winelife</td>
</tr>
<tr>
<td><strong>Sweden</strong></td>
<td></td>
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<tr>
<td>Madelaine Stenwreth</td>
<td>Judge, educator and consultant</td>
</tr>
<tr>
<td>Michel Jamais</td>
<td>Livets Goda magazine</td>
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<tr>
<td>Alf Tumble</td>
<td>Dagens Nyheter daily newspaper</td>
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<tr>
<td><strong>UK</strong></td>
<td></td>
</tr>
<tr>
<td>Andrew Shaw and</td>
<td>Bibendum. Andrew is Head buyer and Jamie buyer for NZ, Bibendum</td>
</tr>
<tr>
<td>Jamie Avenall</td>
<td></td>
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<tr>
<td>Stephen Jenkins</td>
<td>Sainsbury's Supermarkets Stephen Jenkins is the Wine Buyer and Andrew Phelps, the Category Manager</td>
</tr>
<tr>
<td>and Andrew Phelps</td>
<td></td>
</tr>
<tr>
<td>Tom Stevenson</td>
<td>The World Encyclopedia of Champagne and Sparkling Wine, and the Annual Champagne and Sparkling Wine Guide, writes on Tom Cannavan's Wine Pages and others</td>
</tr>
<tr>
<td>Jane Parkinson</td>
<td>The Wine Gang, freelance writer, author and educator</td>
</tr>
<tr>
<td>Jamie Goode</td>
<td>wineanorak.co.uk</td>
</tr>
<tr>
<td>Olly Smith</td>
<td>Wine columnist, Daily Mail weekend magazines (Live &amp; Event), plus TV presenter, for Channel 4's The Secret Supper Club, the Iron Chef and BBC Saturday Kitchen</td>
</tr>
<tr>
<td>Sally Easton</td>
<td>Writer, Educator, Consultant, <a href="http://www.winewisdom.com">www.winewisdom.com</a></td>
</tr>
<tr>
<td>Ed Robinson</td>
<td>Wine Buyer Co-Operative Group</td>
</tr>
<tr>
<td>Liam Steevenson</td>
<td>Waitrose Buyer, Wines</td>
</tr>
<tr>
<td>MW</td>
<td></td>
</tr>
<tr>
<td>Graham Nash</td>
<td>Product Development Manager for Tesco's Stores UK</td>
</tr>
<tr>
<td>Greg Randall</td>
<td>Buying Manager for Tesco's Stores UK</td>
</tr>
<tr>
<td>Stephen Jenkins</td>
<td>Wine Buyer, Sainsbury's</td>
</tr>
<tr>
<td>Sophie Hoog</td>
<td>Category Manager, Sainsbury's</td>
</tr>
<tr>
<td><strong>Australia</strong></td>
<td></td>
</tr>
<tr>
<td>Gary Walsh</td>
<td>Publisher of the successful internet review site <a href="http://www.winorama.com.au">www.winorama.com.au</a> and is the former wine editor for Inside Out Magazine</td>
</tr>
<tr>
<td>Campbell Mattinson</td>
<td>Winefront. Editor of James Halliday's Wine Companion magazine.</td>
</tr>
<tr>
<td>Dave Brookes</td>
<td>Contributes to Gourmet Traveller WINE (AUS), Wine Companion (AUS), Adelaide-Review (AUS), The Guardian (AUS) &amp; Wine &amp; Spirits (U.S.), publishes his popular blog, Vinofreakism</td>
</tr>
<tr>
<td>Frank Moreau MS</td>
<td>Master Somm, Merrivale Group</td>
</tr>
<tr>
<td>Peter Bourne</td>
<td>Educator, freelance writer. The SMH Magazine, The Age Magazine, Gourmet Traveller Wine</td>
</tr>
<tr>
<td>Tyson Stelzer</td>
<td>Australian Wine Communicator of the Year 2013, publishes Wine Tastes e newsletter plus contributes to about 15 publications (inc AGTW, Decanter, Wine Spectator)</td>
</tr>
<tr>
<td>Nick Stock</td>
<td>Writer, Gourmet Traveller Wine, Jamesuckling.com</td>
</tr>
</tbody>
</table>

“To those who truly understand fine, sublime wine, the reds of New Zealand are where the 21st century is at”.

**Dan Berger’s Vintage Experience, USA, March 20, 2014**
## USER PAYS EVENTS SUMMARY 2013-14

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>CITY</th>
<th>MONTH</th>
<th>NAME</th>
<th>TYPE</th>
<th>AUDIENCE</th>
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</thead>
<tbody>
<tr>
<td>USA</td>
<td>New York</td>
<td>Aug-13</td>
<td>Steve Tanzer Tasting</td>
<td>Media Tasting</td>
<td>Media</td>
</tr>
<tr>
<td>Canada</td>
<td>Nova Scotia</td>
<td>Sep-13</td>
<td>Parts of Wine Festival</td>
<td>Consumer Fair</td>
<td>Public, Media, Trade</td>
</tr>
<tr>
<td>UK</td>
<td>Harrogate</td>
<td>Sep-13</td>
<td>The Three Wine Men</td>
<td>Consumer Fair</td>
<td>Public, Media</td>
</tr>
<tr>
<td>Canada</td>
<td>Vancouver</td>
<td>Oct-13</td>
<td>New Zealand meets Asia boutique wine event</td>
<td>Consumer Fair</td>
<td>Public, Media, Trade</td>
</tr>
<tr>
<td>UK</td>
<td>London</td>
<td>Oct-13</td>
<td>FIZZ – The Sparkling Wine Show</td>
<td>Tasting</td>
<td>Media, Trade</td>
</tr>
<tr>
<td>Germany</td>
<td>Hamburg</td>
<td>Oct-13</td>
<td>Self Pour Tasting</td>
<td>Tasting</td>
<td>Media, Trade</td>
</tr>
<tr>
<td>Sweden</td>
<td>Stockholm</td>
<td>Oct-13</td>
<td>Self Pour Tasting</td>
<td>Tasting</td>
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<td>British Columbia</td>
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<td>Quebec</td>
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<td>Jun/Jul-14</td>
<td>LCBO VINTAGES Release plus Summer BBQ event</td>
<td>Promotion</td>
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AIR NEW ZEALAND WINE AWARDS 2013

This event took place in November and culminated in the announcement of the trophy winners at the Awards Dinner held on Saturday 23 November 2013 at the Queenstown Events Centre.

For more information on the Air New Zealand Wine Awards, visit www.airnzwineawards.co.nz

AIR NEW ZEALAND WINE AWARDS 2013 TROPHY WINNERS

Air New Zealand Champion Wine of the Show
Nautilus Cuvée Brut NV
O-I New Zealand Reserve Wine of the Show
Villa Maria Reserve Hawke’s Bay Chardonnay 2012
Label and Litho Limited Champion Sauvignon Blanc
Boundary Vineyards Rapaura Road Sauvignon Blanc 2013
Rabobank New Zealand Limited Champion Chardonnay
Villa Maria Reserve Hawke’s Bay Chardonnay 2012

Guala Closures NZ Champion Pinot Gris
Lake Chalice Marlborough Pinot Gris 2013

Plant & Food Research Champion Riesling
Highfield Riesling 2012

ICIB Gold Medal Insurance Champion Gewürztraminer
Not Awarded

BDO Champion Other White Styles and Rosé
Coopers Creek SV Gisborne Albariño ‘Bell-Ringer’ 2013

Wineworks Champion Sparkling Wine
Nautilus Cuvée Brut NV

Stuff.co.nz Champion Dessert Wine
Riverby Estate Noble Riesling 2012

JF Hillebrand New Zealand Ltd Champion Pinot Noir
Greystone Waipara Valley Pinot Noir 2012

Fruitfed Supplies Limited Champion Syrah
Elephant Hill Syrah 2012

Coast FM Champion Merlot, Cabernet and Blends
Villa Maria Reserve Gimblett Gravels Hawke’s Bay Cabernet Sauvignon Merlot 2010

Fairfax Media Champion Other Red Styles
Not Awarded

New World Champion Open White Wine
Lake Chalice Marlborough Pinot Gris 2013

Liquorland Champion Open Red Wine
Church Road McDonald Series Merlot 2011

Waitoa Free Range Chicken Champion Exhibition White or Sparkling Wine
Villa Maria Single Vineyard Keltern Chardonnay 2012

Business World Travel Champion Exhibition Red Wine
Esk Valley Winemakers Reserve Hawke’s Bay Syrah 2010

BRAGATO WINE AWARDS TROPHY RESULTS 2013

Champion Wine of Show and Bragato Trophy Winner
Akarua Pinot Noir 2011
Akarua — Central Otago
Mark Naismith

Richard Smart Trophy and Reserve Champion Wine
Villa Maria Single Vineyard Taylors Pass Chardonnay 2011
Taylors Pass Vineyard — Marlborough
Ian Buck

Friedrich Wohlsiedler Trophy and Champion Riesling
Wither Hills Cellar Release Kerselaey Riesling 2012
Kerselaey — Marlborough
Wendy and Owen Glover

Brother Cyprian Trophy and Champion Pinot Gris
Thornbury Waipara Pinot Gris 2013
Waipara Vineyard — Waipara
Royce Mceean

New Zealand Wine Cellars Spence Brothers Trophy and Champion Sauvignon Blanc
Saint Clair Pioneer Block 1 Foundation Sauvignon Blanc 2012
Swamp Road Vineyard — Marlborough
Phillip & Cheryl Sowman

Bill Irwin Trophy and Champion Chardonnay
Villa Maria Single Vineyard Taylors Pass Chardonnay 2011
Taylors Pass Vineyard — Marlborough
Ian Buck

Mike Wolter Memorial Trophy and Champion Pinot Noir
Akarua Pinot Noir 2011
Akarua — Central Otago
Mark Naismith

Alan Limmer Trophy and Champion Syrah
Vidal Legacy Series Gimblett Gravels Syrah 2009
Omahu Gravels Vineyard — Hawkes Bay
Phil Holden

Tom Mcdonald Memorial Trophy and Champion Classical Red Wine
Villa Maria Reserve Gimblett Gravels Cabernet Sauvignon Merlot 2010
Vidal Vineyard — Hawkes Bay
Phil Holden

Champion Sparkling
Akarua Rose Brut NV
Akarua — Central Otago
Mark Naismith

Champion Gewürztraminer
Zephyr Gewürztraminer 2012
Glover Family Vineyards — Marlborough
Owen Glover

Champion Other White Wine
Coopers Creek SV Gisborne Albariño Bell-Ringer 2013
Bell Vineyard — Gisborne
Doug and Delwyn Bell

Champion Other Red Wine
Waima Tre’s Red 2012
Waima Estates Nelson Ltd
Trevor and Ben Bolitho

Champion Rosé
Clearview Black Reef Blush
Clearview Estate
Tim Turvey And Helma Van Den Berg

Champion Dessert
Villa Maria Reserve Marlborough Noble Riesling 2012
Roncenvin Estate Vineyard — Marlborough
Chris Fletcher

Sustainability Trophy
Akarua Pinot Noir 2011
Akarua — Central Otago
Mark Naismith
NEW ZEALAND WINE INDUSTRY KEY PERFORMANCE INDICATORS: JUNE Y/E 2014

TOTAL VALUE OF EXPORTS

$1.33 BILLION
10% JUNE 2014

GROWTH MARKETS —
FOB VALUE JUN 2014

USA
$328M
16%

CANADA
$78.9M
1%

CHINA
$24.8M
8%

HONG KONG
$16.9M
18%

GERMANY
$14.5M
52%

NETHERLANDS
$33.4M
25%

EXPORT PRICE

PACKAGED WINE
$8.32/L
1% JUNE 2014

BULK WHITE WINE
$4.00/L
7% JUNE 2014

MATURE MARKETS — AVERAGE IN-MARKET PRICE PER BOTTLE

AUSTRALIA
AUD $13.28
5% DEC 2013

UNITED KINGDOM
£7.27
11% APR 2014

SHARE OF TOTAL EXPORTS, VOLUME — JUNE 2014

85.5% SAUVIGNON BLANC
14.5% OTHER VARIETALS

* All figures are for the 12 months to the date specified. Figures are in $NZD unless otherwise specified.
## SUMMARY: NEW ZEALAND WINE (2005-2014)

<table>
<thead>
<tr>
<th>Year</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
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<tbody>
<tr>
<td>Number of Wineries</td>
<td>516</td>
<td>530</td>
<td>543</td>
<td>585</td>
<td>643</td>
<td>672</td>
<td>697</td>
<td>703</td>
<td>698</td>
<td>699</td>
</tr>
<tr>
<td>Number of Growers</td>
<td>818</td>
<td>866</td>
<td>1003</td>
<td>1060</td>
<td>1117</td>
<td>N/A</td>
<td>791</td>
<td>824</td>
<td>833</td>
<td>**</td>
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<tr>
<td>Producing Area (hectares)</td>
<td>21,002</td>
<td>22,616</td>
<td>25,355</td>
<td>29,310</td>
<td>31,964</td>
<td>33,200</td>
<td>34,500</td>
<td>35,337</td>
<td>35,182</td>
<td>35,313</td>
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<tr>
<td>Average Yield (tonnes per hectare)</td>
<td>6.9</td>
<td>8.2</td>
<td>8.1</td>
<td>9.7</td>
<td>8.9</td>
<td>8.0</td>
<td>9.5</td>
<td>7.6</td>
<td>9.8</td>
<td>12.6</td>
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<tr>
<td>Average Grape Price (NZ$ per tonne)</td>
<td>1,792</td>
<td>2,022</td>
<td>1,981</td>
<td>2,161</td>
<td>1,629</td>
<td>1,293</td>
<td>1,293</td>
<td>1,359</td>
<td>1,688</td>
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<tr>
<td>Tonnes Crushed</td>
<td>142,000</td>
<td>185,000</td>
<td>205,000</td>
<td>285,000</td>
<td>285,000</td>
<td>266,000</td>
<td>328,000</td>
<td>269,000</td>
<td>345,000</td>
<td>445,000</td>
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<tr>
<td>Total Production (millions of litres)</td>
<td>102.0</td>
<td>133.2</td>
<td>147.6</td>
<td>205.2</td>
<td>205.2</td>
<td>190.0</td>
<td>235.0</td>
<td>194.0</td>
<td>248.4</td>
<td>320.4</td>
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<tr>
<td>Domestic Sales of NZ Wine (millions of litres NZ Wine)</td>
<td>45.0</td>
<td>50.0</td>
<td>51.0</td>
<td>46.5</td>
<td>59.3</td>
<td>56.7</td>
<td>66.3</td>
<td>64.6</td>
<td>51.7</td>
<td>50.1*</td>
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<tr>
<td>Consumption per Capita NZ wine (litres NZ wine)</td>
<td>11.2</td>
<td>12.1</td>
<td>12.2</td>
<td>11.1</td>
<td>15.9</td>
<td>15.0</td>
<td>15.2</td>
<td>14.7</td>
<td>11.6</td>
<td>11.2*</td>
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<tr>
<td>Total sales of all wine (millions of litres)</td>
<td>81.7</td>
<td>86.0</td>
<td>91.8</td>
<td>87.4</td>
<td>92.7</td>
<td>92.1</td>
<td>95.9</td>
<td>91.9</td>
<td>92.5</td>
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<td>Consumption per capita all wines (litres)</td>
<td>19.8</td>
<td>20.6</td>
<td>21.7</td>
<td>20.8</td>
<td>21.5</td>
<td>21.1</td>
<td>21.3</td>
<td>20.9</td>
<td>20.8</td>
<td>20.1*</td>
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<tr>
<td>Export Volume (millions of litres)</td>
<td>51.4</td>
<td>57.8</td>
<td>76.0</td>
<td>88.6</td>
<td>112.6</td>
<td>142.0</td>
<td>154.7</td>
<td>178.9</td>
<td>169.6</td>
<td>186.9</td>
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<td>Export Value (millions of NZ$ FOB)</td>
<td>434.9</td>
<td>512.4</td>
<td>698.3</td>
<td>797.8</td>
<td>991.7</td>
<td>1,041</td>
<td>1,094</td>
<td>1,177</td>
<td>1,211</td>
<td>1,328</td>
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* Estimate only  
** Not available
### NEW ZEALAND WINEGROWERS MEMBERSHIP (2005-2014)

#### WINERIES BY CATEGORY¹

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<td>622</td>
<td>613</td>
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<td>Category 2</td>
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<td>42</td>
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<td>56</td>
<td>60</td>
<td>61</td>
<td>73</td>
<td>71</td>
<td>75</td>
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<td>Category 3</td>
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<td>6</td>
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<td>543</td>
<td>585</td>
<td>643</td>
<td>672</td>
<td>698</td>
<td>703</td>
<td>698</td>
<td>699</td>
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</table>

¹ Up to 2007: Category I — annual sales not exceeding 200,000 litres  
Category 2 — annual sales between 200,000 and 2,000,000 litres  
Category 3 — annual sales exceeding 2,000,000 litres  
² From 2008: Category I — annual sales not exceeding 200,000 litres  
Category 2 — annual sales between 200,000 and 4,000,000 litres  
Category 3 — annual sales exceeding 4,000,000 litres

#### WINERIES BY REGION

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<td>530</td>
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<td>672</td>
<td>698</td>
<td>703</td>
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#### GRAPE GROWERS BY REGION

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<th>Region</th>
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* Forward estimate

Source: New Zealand Winegrowers' Vineyard Surveys

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* Forward estimate

Source: New Zealand Winegrowers' Vineyard Surveys
### NEW ZEALAND VINTAGES (2005-2014)

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#### INDUSTRY TOTAL

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<th>2014</th>
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<td>185,000</td>
<td>205,000</td>
<td>285,000</td>
<td>285,000</td>
<td>266,000</td>
<td>328,000</td>
<td>269,000</td>
<td>345,000</td>
<td>445,000</td>
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* The data shown are the results from the New Zealand Winegrowers’ Annual Vintage Surveys, whereas ‘Industry Total’ represents the tonnes crushed by the total wine industry. The difference between ‘Total’ and ‘Industry Total’ is data from wine companies who did not respond to the Vintage Survey.

Source: New Zealand Winegrowers’ Annual Vintage Surveys
## New Zealand Wine Exports by Market (2005-2014)

<table>
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<tr>
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<td>1.572</td>
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<td>0.624</td>
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<td>0.674</td>
<td>0.897</td>
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<td>1.996</td>
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<td>0.604</td>
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<td>1.459</td>
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<td>2.742</td>
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<td>2.987</td>
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<td>23.358</td>
<td>41.634</td>
<td>46.638</td>
<td>47.758</td>
<td>56.124</td>
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**TOTAL** | 51.373 | 57.791 | 76.024 | 88.636 | 112.647 | 142.032 | 154.661 | 178.880 | 169.669 | 186.889 |
| **NZ$** | 434.856 | 512.362 | 698.303 | 797.797 | 991.721 | 1,040.529 | 1,093.973 | 1,176.847 | 1,210.525 | 1,328.358 |

**Note:** All figures are in millions.

**Source:** Statistics New Zealand
# New Zealand Wine Exports by Market (Year End June 2014)

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<tr>
<th></th>
<th>White 750ml</th>
<th>White Other</th>
<th>White Total</th>
<th>Red 750ml</th>
<th>Red Other</th>
<th>Red Total</th>
<th>Sparkling</th>
<th>Fortified</th>
<th>Total</th>
</tr>
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<td>12,014</td>
<td>48,666</td>
<td>3,556</td>
<td>0.684</td>
<td>4,220</td>
<td>0.567</td>
<td>0.235</td>
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<td>2,819</td>
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<td>17.37</td>
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<td>252,542</td>
<td>283,156</td>
<td>3.02</td>
<td>2.155</td>
<td>5.17</td>
<td>8.79</td>
<td>328,497</td>
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<td><strong>China</strong></td>
<td>1,598</td>
<td>10,912</td>
<td>12,510</td>
<td>0.37</td>
<td>0.289</td>
<td>0.66</td>
<td>0.077</td>
<td>0.015</td>
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<td>0.162</td>
<td>0.317</td>
<td>0.002</td>
<td>2.012</td>
<td>2.323</td>
</tr>
<tr>
<td><strong>Germany</strong></td>
<td>0.921</td>
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<td>8,196</td>
<td>0.07</td>
<td>0.059</td>
<td>0.134</td>
<td>0.021</td>
<td>0.014</td>
<td>0.185</td>
</tr>
<tr>
<td><strong>Japan</strong></td>
<td>0.772</td>
<td>7,569</td>
<td>8,341</td>
<td>0.03</td>
<td>0.049</td>
<td>0.082</td>
<td>0.002</td>
<td>0.092</td>
<td>0.184</td>
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<tr>
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<td>8,799</td>
<td>9,906</td>
<td>0.20</td>
<td>0.121</td>
<td>0.321</td>
<td>0.001</td>
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<td>0.332</td>
</tr>
<tr>
<td><strong>Denmark</strong></td>
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<td>89,931</td>
<td>91,439</td>
<td>0.12</td>
<td>0.112</td>
<td>0.234</td>
<td>0.002</td>
<td>0.074</td>
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</tr>
<tr>
<td><strong>Norway</strong></td>
<td>0.211</td>
<td>1,716</td>
<td>1,737</td>
<td>0.07</td>
<td>0.078</td>
<td>0.156</td>
<td>0.002</td>
<td>0.032</td>
<td>0.054</td>
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<tr>
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<td>11,532</td>
<td>1,150</td>
<td>12,682</td>
<td>1,501</td>
<td>1,260</td>
<td>1,688</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>36,652</td>
<td>203,905</td>
<td>240,557</td>
<td>3,556</td>
<td>0.684</td>
<td>4,220</td>
<td>0.567</td>
<td>0.235</td>
<td>50,709</td>
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</tbody>
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Note: L and NZ $ figures are in millions
Source: Statistics New Zealand

Percentages:

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<th>WHITE 750ML</th>
<th>WHITE OTHER</th>
<th>WHITE TOTAL</th>
<th>RED 750ML</th>
<th>RED OTHER</th>
<th>RED TOTAL</th>
<th>SPARKLING</th>
<th>FORTIFIED</th>
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<td>1,049,185</td>
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<td>12,682</td>
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<td>4,220</td>
<td>0.567</td>
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## NEW ZEALAND WINE EXPORTS BY VARIETY (2008-2014)

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<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
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<td>3.612</td>
<td>4.688</td>
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<td>1.765</td>
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<td>1.271</td>
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<td>1.451</td>
<td>1.700</td>
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<td>1.067</td>
<td>1.022</td>
<td>1.094</td>
<td>1.254</td>
<td>1.424</td>
<td>1.030</td>
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<tr>
<td>Riesling</td>
<td>1.003</td>
<td>0.776</td>
<td>0.971</td>
<td>1.062</td>
<td>1.057</td>
<td>0.924</td>
<td>0.996</td>
</tr>
<tr>
<td>Rosé</td>
<td>0.963</td>
<td>0.704</td>
<td>0.559</td>
<td>0.622</td>
<td>0.586</td>
<td>0.490</td>
<td>0.712</td>
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<td>Syrah</td>
<td>0.337</td>
<td>0.355</td>
<td>0.227</td>
<td>0.307</td>
<td>0.309</td>
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<td>Gewürztraminer</td>
<td>0.131</td>
<td>0.146</td>
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<td>0.306</td>
<td>0.202</td>
<td>0.192</td>
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<tr>
<td>Other White Varietals</td>
<td>0.039</td>
<td>0.081</td>
<td>0.069</td>
<td>0.076</td>
<td>0.118</td>
<td>0.103</td>
<td>0.127</td>
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<tr>
<td>Sparkling Sauvignon</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
<td>0.217</td>
<td>0.360</td>
<td>0.107</td>
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<tr>
<td>Other Red Varietals</td>
<td>0.089</td>
<td>0.049</td>
<td>0.060</td>
<td>0.087</td>
<td>0.095</td>
<td>0.045</td>
<td>0.068</td>
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<tr>
<td>Generic White</td>
<td>0.700</td>
<td>1.117</td>
<td>0.991</td>
<td>0.532</td>
<td>0.719</td>
<td>0.266</td>
<td>0.043</td>
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<td>Chardonnay Blend</td>
<td>0.359</td>
<td>0.208</td>
<td>0.426</td>
<td>0.415</td>
<td>0.149</td>
<td>0.997</td>
<td>0.047</td>
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<td>Sweet Wines</td>
<td>0.043</td>
<td>0.034</td>
<td>0.027</td>
<td>0.039</td>
<td>0.055</td>
<td>0.038</td>
<td>0.037</td>
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<tr>
<td>Sauvignon Blend</td>
<td>0.024</td>
<td>0.328</td>
<td>0.354</td>
<td>0.077</td>
<td>0.140</td>
<td>0.422</td>
<td>0.034</td>
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<tr>
<td>Chenin Blanc</td>
<td>0.008</td>
<td>0.009</td>
<td>0.010</td>
<td>0.007</td>
<td>0.013</td>
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<td>0.013</td>
<td>0.005</td>
<td>0.001</td>
<td>0.008</td>
<td>0.002</td>
<td>0.003</td>
<td>0.008</td>
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<tr>
<td>Cabernet Sauvignon</td>
<td>0.015</td>
<td>0.014</td>
<td>0.043</td>
<td>0.020</td>
<td>0.030</td>
<td>0.046</td>
<td>0.006</td>
</tr>
<tr>
<td>Fortified</td>
<td>0.026</td>
<td>0.030</td>
<td>0.011</td>
<td>0.001</td>
<td>0.001</td>
<td>0.001</td>
<td>0.004</td>
</tr>
<tr>
<td>Generic Red</td>
<td>0.082</td>
<td>0.035</td>
<td>0.068</td>
<td>0.022</td>
<td>0.021</td>
<td>0.043</td>
<td>0.002</td>
</tr>
</tbody>
</table>

TOTAL*                      | 87.793  | 113.000 | 141.139 | 156.990 | 179.783 | 172.437 | 187.757 |

* Data will differ slightly 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 (2005-2014)

### By Country of Origin

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>24,340</td>
<td>27,250</td>
<td>36,497</td>
<td>22,412</td>
<td>20,019</td>
<td>26,502</td>
<td>22,512</td>
<td>21,897</td>
<td>32,564</td>
<td>31,658</td>
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<tr>
<td>Chile</td>
<td>0.668</td>
<td>1.038</td>
<td>0.953</td>
<td>2.593</td>
<td>0.858</td>
<td>0.102</td>
<td>0.062</td>
<td>0.530</td>
<td>1.935</td>
<td>2.456</td>
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<tr>
<td>France</td>
<td>0.903</td>
<td>1.132</td>
<td>1.157</td>
<td>1.990</td>
<td>1.872</td>
<td>0.894</td>
<td>1.095</td>
<td>1.449</td>
<td>2.023</td>
<td>2.153</td>
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<tr>
<td>South Africa</td>
<td>6.151</td>
<td>3.385</td>
<td>0.768</td>
<td>10.414</td>
<td>5.860</td>
<td>1.710</td>
<td>1.694</td>
<td>2.579</td>
<td>1.732</td>
<td></td>
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<tr>
<td>Spain</td>
<td>0.404</td>
<td>0.393</td>
<td>0.494</td>
<td>0.486</td>
<td>0.493</td>
<td>0.207</td>
<td>0.250</td>
<td>0.311</td>
<td>0.429</td>
<td>0.518</td>
</tr>
<tr>
<td>Argentina</td>
<td>0.890</td>
<td>0.765</td>
<td>0.371</td>
<td>0.362</td>
<td>0.380</td>
<td>0.053</td>
<td>0.051</td>
<td>0.082</td>
<td>0.161</td>
<td></td>
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<tr>
<td>Italy</td>
<td>1.632</td>
<td>1.614</td>
<td>1.850</td>
<td>2.312</td>
<td>1.523</td>
<td>1.067</td>
<td>0.995</td>
<td>0.858</td>
<td>0.865</td>
<td>0.94</td>
</tr>
<tr>
<td>Others</td>
<td>0.884</td>
<td>0.337</td>
<td>0.288</td>
<td>0.381</td>
<td>0.605</td>
<td>0.283</td>
<td>0.631</td>
<td>0.511</td>
<td>0.382</td>
<td>1.106</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>35.872</td>
<td>35.894</td>
<td>42.378</td>
<td>40.949</td>
<td>33.344</td>
<td>35.059</td>
<td>27.287</td>
<td>27.331</td>
<td>40.892</td>
<td>40.724</td>
</tr>
</tbody>
</table>

### Note:
All figures are in millions of litres.

## Wine Imports into New Zealand (Year End June 2014)

### Country of Origin

<table>
<thead>
<tr>
<th>Country of Origin</th>
<th>White</th>
<th>Red</th>
<th>Sparkling</th>
<th>Fortified</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>14,106,454</td>
<td>18,530,361</td>
<td>16,328</td>
<td>17,108</td>
<td>21,251</td>
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<td>South Africa</td>
<td>830,747</td>
<td>2,820,011</td>
<td>853,039</td>
<td>2,152,269</td>
<td>958,163</td>
</tr>
<tr>
<td>Chile</td>
<td>1,498,030</td>
<td>1,764,727</td>
<td>958,163</td>
<td>1,272</td>
<td>365</td>
</tr>
<tr>
<td>Italy</td>
<td>108,398</td>
<td>715,422</td>
<td>558,104</td>
<td>1,077</td>
<td>3,492,535</td>
</tr>
<tr>
<td>Spain</td>
<td>21,207</td>
<td>146,893</td>
<td>390,509</td>
<td>2,112,997</td>
<td>103,879</td>
</tr>
<tr>
<td>Argentina</td>
<td>17,207</td>
<td>61,015</td>
<td>141,312</td>
<td>807,053</td>
<td>592,103</td>
</tr>
<tr>
<td>Others</td>
<td>13,478</td>
<td>61,015</td>
<td>141,312</td>
<td>807,053</td>
<td>592,103</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>17,279,906</td>
<td>20,541,757</td>
<td>20,346,297</td>
<td>45,923,993</td>
<td>157,980</td>
</tr>
</tbody>
</table>

### Note:
All figures are in millions.

**Source:** Statistics New Zealand
WINERIES

CATEGORIE ONE

Steve Green, Carrick Chair Chair
Paul Dunleavy, Te Muto Vineyard Member Member
Christine Kernohan, Gladstone Vineyard Alternate Alternate

CATEGORIE TWO

Peter Holley, Mission Estate Winery Member Member
Blair Gibbs, Spy Valley Member Member
Mike Brown, Kono Beverages—Tohu Winery Alternate Alternate

CATEGORIE THREE

Fabian Yukich, Villa Maria Estate Member Member
Fabian Partigliani, Pernod Ricard New Zealand Member Member
Joe Stanton, Constellation New Zealand Member Member
Jim Delegat, Delegat's Wine Estate Alternate Alternate

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Gwyn Williams Member Vice-President
Dominic Pecchenino Member Member
Richard Rose Member Member
Chris Howell Member Member
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Alan Knight Alternate Member
Xan Harding Alternate Member
Rex Sunde Alternate Member
James Dicey Alternate Member

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1984-1994  Ross Goodin
1994-1999  Kevin Moore QSM
1999-2003  William Crosse
2003-2005  John Webber
2005-2006  Ian Miller
2006-2012  Stuart Smith
2012-Present  John Clarke

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2006  Reid Fletcher
2008  Tim Finn
2008  John Webber
2012  Robyn Dickey
2015  Stuart Smith
2015  Sir George Fistonich

NEW ZEALAND GRAPE-growers

2005  Margaret Harvey MW

WINE INSTITUTE OF NEW ZEALAND

1982  George T Mazuran 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 Knappeisen RD Oen
1995  Peter J Babich MBE
1996  Terence J Deleavy MBE, JP
1997  Donald W Massey
1998  Anthony F Soljan
1999  John Buck OBE
2003  Kerry Hitchcock

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2004-2006  Brian J Viecelli
2006-2012  Stuart Smith
2012-Present  Steve Green

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1975-1978  Alexander A Corban OBE, BSc, RD Oen
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1980-1982  Thomas B McDonald OBE, JP
1982-1985  Mate G Brajkovich OBE
1985-1991  Bryan W Mogridge ONZM, BSc
1991-1996  John Buck OBE
1996-1999  Ross R Spence QSO
1999-2004  Peter V Hubscher MNZM
2004-2006  Brian J Viecelli
2006-2008  Sir George Fistonich
2008-Present  Steve Green

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2005  Margaret Harvey MW

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1997  Bryan W Mogridge ONZM, BSc
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1999  Stanley L Harris QSM

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2005  Willie Crosse
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