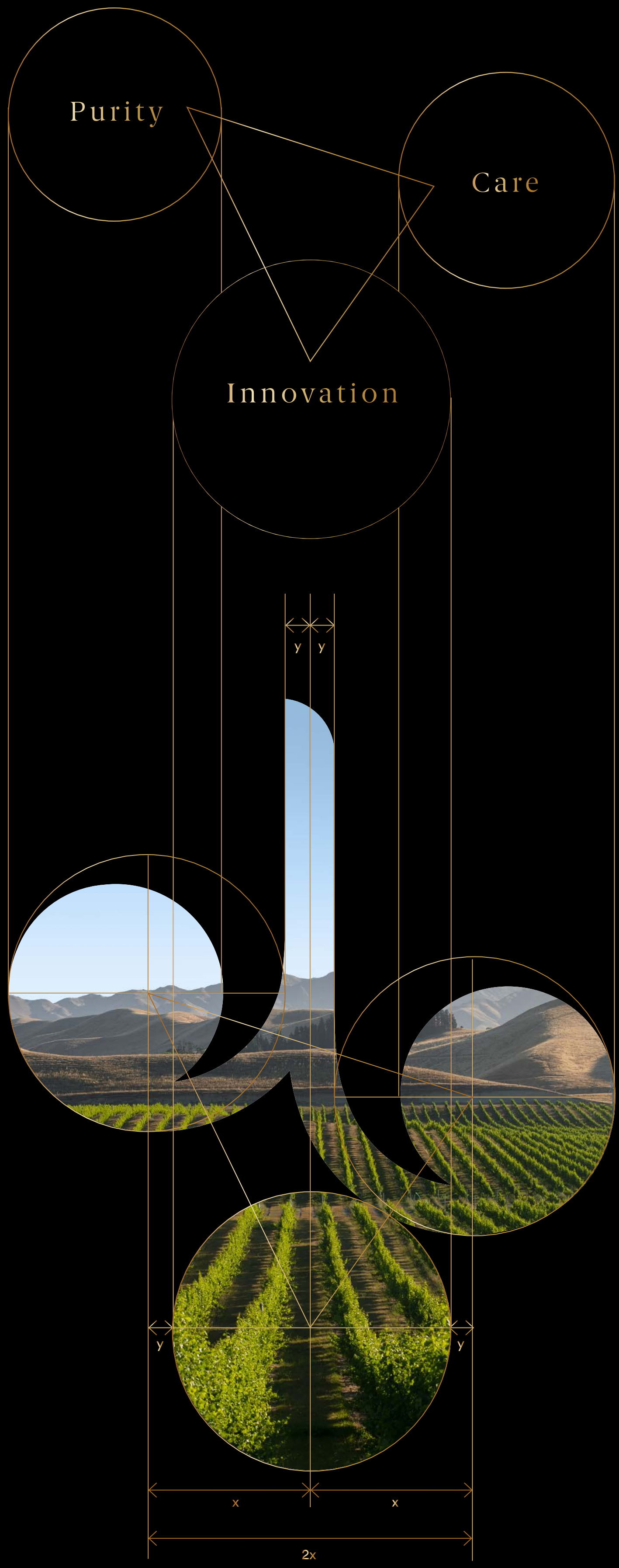
New Zealand Winegrowers Inc
Annual Report
2023



Altogether Unique.

Some places have
unblemished sunlight,
young soil or beautiful water.

Others have **innovation**,
passion for the craft or
care for the land.

But only one place has
the **purity** of it all...


New Zealand Wine
Altogether Unique.

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.

Photo on cover and previous pages, Richard Briggs

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Chair's Report

In last year's report, we forecast that New Zealand grape growers and wineries were '...looking to the future with renewed certainty and confidence' after three testing years of COVID-generated uncertainty.

That confidence has been validated in numerous initiatives and developments over the past 12 months. Highlighting the positive trends, our wine exports have surged to new record levels with the largest ever one-year growth, lifting 23% in value to $2.4 billion. With value growth outpacing volume (+19%), it is clear consumers are prepared to pay the higher prices New Zealand wines command.

This exceptional performance has catapulted New Zealand up the international rankings. We are now the world's sixth-largest exporter of wine (by value) despite producing less than 2% of global supply.

Alongside the positive sales headlines have been other significant developments. We launched our new brand, Altogether Unique, which reflects and supports those characteristics that mark New Zealand wine as such a compelling proposition in global markets.

Domestically, inbound tourism numbers have increased, providing a real boost to many small wineries who are heavily dependent on tourism. Open borders have also eased the labour shortages which plagued the industry over the COVID years.

And to top off the year, a New Zealander, Dr John Barker, was elected Director General of the International Organisation of Vine and Wine (OIV), an intergovernmental wine organisation that issues recommendations on technical and scientific aspects of viticulture and winemaking. His election in June speaks highly of the international standing and reputation our industry and our people have developed over the past 30 years. Hailing from New Zealand's modern and innovative industry, he is the right person to lead the global wine body into its second century.

These developments reflect the commitment, innovation, and market-led successes of New Zealand's wine community. We are very proud of these achievements—they are wins not only for our industry, but for our country as well.

MARKETS ARE DEMANDING MORE

The New Zealand wine industry is now the most export-focused of all the world's wine industries with close to 90% of sales occurring outside our home market. This focus is a function of having a small domestic market and off-shore sales success—it makes our industry particularly sensitive to changes (positive or negative) in global trade rules.

The $450 million growth in export value in the past year testifies to the strong consumer demand for New Zealand wine in key markets, particularly Sauvignon Blanc. Performance of other styles struggle to match this pace, but in export markets and at home, our range of highly distinctive wine styles is a critical contributor to our reputation as a producer of the first rank.

Growth in the past year was led by sales into the US, which jumped 25% to $870 million. Further growth is expected in the US market in the year ahead, which may become a billion-dollar market in its own right in the future.

Market development over the next 12 months will be supported by the NZ/UK Free Trade Agreement (FTA) which removes a number of technical barriers to trade for our wine shipments. Likewise, the NZ/EU FTA should support sales growth into the EU when it comes into force, hopefully sometime early in 2024.

CELEBRATION OF WINE INDUSTRY SUCCESS, PARLIAMENT, 2022
PHOTO: COLIN MCDIARMID

Our Altogether Unique branding has supported our activities since its launch in January 2023. With our new positioning in place, we have redefined our activities as ‘Brand’ rather than ‘Marketing’, reflecting our focus on Brand New Zealand Wine. We will continue to build the momentum around the Altogether Unique platform in coming months.

To maximise the impact of the New Zealand wine story in-market, we continue to work very closely with New Zealand Trade and Enterprise (NZTE) and its Made with Care campaign. The synergies between Made with Care and Altogether Unique are inherent, which makes this collaboration a very natural one.

Less positively, short-term economic uncertainty and inflation are having an impact on consumer confidence in key markets. Quite how (if at all) this impacts demand for New Zealand wine is not clear. To date New Zealand wine sales have continued to perform well, while over the past two decades our sales have consistently outperformed during market downturns. In the UK, our second-largest market, consumer decision-making will also be impacted by forthcoming changes to alcohol taxation, which will add even more uncertainty into the mix.

A CLIMATE-CHANGED FUTURE

While overall production from Vintage 2023 was down 6% on 2022, many members in North Island regions were hit hard by Cyclone Gabrielle —crops were lost and, in some cases, vineyards were completely destroyed. The damage wrought by the storm will impact affected members for a long time. Production in Gisborne was down by 43%, while in Hawke’s Bay a better fruit set than the previous year helped offset the losses caused by poor weather.

In our response to the cyclone, with funding from the Ministry for Primary Industries (MPI), we collaborated with the regional Hawke’s Bay and Gisborne winegrower bodies to engage specialist viticulture experts to provide on-the-ground advice on how to recover the affected vineyards. This programme was well received by members, and likely provides a good model for future emergency responses. ▸

Market development over the next 12 months will be supported by the NZ/UK Free Trade Agreement (FTA).

As with other primary industries, climate change is clearly one of the key major challenges facing our sector; it is now a reality that producers are facing on a daily basis. As with other primary industries, climate change is one of the key major challenges facing our sector; it is now a reality that producers are facing on a daily basis and is impacting day-to-day decisions. Budbreak and harvests are occurring earlier.

Climate change will potentially affect the distinctive characteristics and flavours of our wines that have underpinned our marketplace success. To address this challenge, the Bragato Research Institute (BRI, our wholly owned research subsidiary) has research programmes in place to develop new planting material to meet the challenges of a climate-altered world. BRI is also exploring new vineyard growing systems to lift productivity and make more efficient use of resources in future. In the year ahead, our Environment team will deliver a climate change roadmap for members which will set out how the grape and wine sector can decarbonise in future.

Small wineries are some of our greatest innovators, adding colour and diversity.

Ensuring BRI research is appropriately targeted is a focus for both NZW and BRI. As a business start-up, BRI has made big strides, with a world-class facility and new programmes underway (and staff in place). The focus always, though, is delivering research that works for our members.

SUSTAINABILITY: FIT FOR A BETTER, GREENER WORLD

Our focus on addressing climate change issues reflects our wider commitment to sustainability through our industry-wide certification programme which continues to evolve to meet the demands of the market and regulators. Launched in 1995, Sustainable Winegrowing New Zealand (SWNZ) is widely recognised as a world-leading sustainability programme. Today, 96% of our total vineyard area is certified as sustainable through SWNZ. In addition, we are proud to support Organic Winegrowers New Zealand (OWNZ) and its activities as an alternate programme for our members.

Our commitment to sustainability aligns strongly with the MPI-led vision and strategy, Fit for a Better World. This alignment demonstrates that industry and government both recognise the same key issues influencing our future. This is a strong base from which to co-develop solutions to the sustainability issues of importance to our customers.

Water is currently a very hot sustainability topic for regulators, and rightly so. As efficient users of water, and low users of nitrogenous fertilisers, we believe our industry is well placed to meet the Government's goal to enhance and protect Aotearoa New Zealand's precious water resources.

Over the past two years we have been intent on ensuring that we can utilise SWNZ to demonstrate our producers' commitment to meeting the new regulatory standards. At this stage the regulatory framework does not allow this to occur in the most efficient way possible, and does not recognise the low risk profile of our industry. The current proposal could see certification costs of up to $20 million just for one part of the new regime—these are costs the industry will find difficult to bear. We continue to press the Government to recognise that industry assurance programmes can lower these compliance costs while providing a high level of assurance that regulatory standards are being met, and exceeded.

CONTAINING COSTS

The re-emergence of inflation over the past 18 months is a major concern for grape growers and wineries. Market-driven cost increases are difficult enough to cope with, but in many ways, of even greater concern are those cost increases driven by government.

As noted, the new water regulations will give rise to increased costs for producers; likewise, so will the more than 6% increase in excise which recently came into force (on top of an even larger rise in 2022). Then there are the cost increases associated with wage rates for Recognised Seasonal Employer (RSE) workers, the lift in the minimum wage, and looking ahead the possible imposition of a container recovery scheme, amongst others.

In isolation each cost increase is bad enough; taken together they gnaw away at profitability and reduce the cash available to grow our industry, exports, and jobs in our sector. A frequent refrain from business owners, particularly proprietors of small, family-owned enterprises, is that all the regulatory costs are just becoming too much.

The challenges facing small-business owners are deeply concerning. We need a thriving small winery community as an important part of our industry. Small wineries are some of our greatest innovators; they add colour and diversity to our consumer offering. Government must be cognisant of the impacts their decisions have on the small producer sector, otherwise they will undermine one of the pillars of our success.

REBOUNDING TOURISM

With borders now open, our wineries have welcomed the return of overseas tourists to cellar doors in the past 12 months.

However, wineries are facing challenges around the licensing rules for their cellar door operations. Positively, the Sale and Supply of Alcohol (Cellar Door Tasting) Amendment Bill before Parliament would enable wineries to charge for tastings at their cellar doors, without having to go to the cost and expense of obtaining a separate on-licence; this would address a long-standing concern.

On the other hand, the Sale and Supply of Alcohol (Community Participation) Bill could see existing winery cellar doors closed down without compensation if the legislation is passed. We know this is not the intention of this Bill, but it is a clear possibility given the current drafting. To remove this possibility, we believe wineries should be exempt from the density and proximity provisions of the Bill.


LONG SPUR PRUNING TRIAL, RARANGI WINERY

OUR PEOPLE

Open borders have meant producers have also benefited from improved availability of seasonal workers. These workers play a key role in our sector—they enable us to meet peak workforce requirements that would otherwise be a real stretch for our full-time workforce, and for which there is no technological replacement.

A focus of our activities in the past year has been various workstreams around the RSE scheme and the review being conducted by the Ministry of Business, Innovation and Employment (MBIE). We have worked very closely with other horticulture industry bodies to ensure positive outcomes for individual RSE workers, our Pacific neighbours, and employers. Given our reliance on RSE workers to perform key seasonal tasks, especially pruning, this will continue as a priority in coming months.

This year, in a first, we were proud to release a report on the the gender pay gap in our sector, which showed a median average of 7.8% across the industry. While this is below the national average, it was higher for some roles. Clearly there is work to be done. We continue to urge members to review their payrolls to establish their own pay gap metrics, and commit to make changes to achieve equal pay for all. ▸

We continue to support activities that help to ensure our industry is identified as an industry of choice.

More broadly, we continue to support activities that help to ensure the industry is identified as an industry of choice by employees. Initiatives such as Women in Wine, Young Winemaker of the Year, and Young Viticulturist of the Year are all strongly supported by members.

We are pleased this year to add Mal McLennan and Peter Holley from Hawke's Bay, Neal and Judy Ibbotson from Marlborough, and Dr David Jordan from Auckland to the Roll of Fellows of New Zealand Winegrowers (NZW). Their service across many years to our wine community has helped build the New Zealand wine success story that we are so proud of today.

INFORMING BUSINESS DECISIONS

One of our most important roles as a member organisation is to provide relevant information that is critical to wineries and grape growers successfully managing their businesses.
To enhance our capability to inform and engage members, we have been upgrading our IT systems. Project Kārearea has involved a complete rebuild of our CRM system and many related platforms. We are confident the rollout of the new platforms in the coming months will enable us to deliver enhanced service levels to members in the year ahead.

DESIGNING THE NEW NEW ZEALAND WINEGROWERS

New Zealand Winegrowers is the unified industry organisation which represents and promotes the interests of all the wineries and grape growers in New Zealand. Last year we announced a review of our industry's representation, governance, and levies to ensure we are well-positioned to support our sector for decades to come. For a variety of reasons, including Cyclone Gabrielle, we did not progress the review as much as planned in the past 12 months.

However, we remain committed to the review process. We have added additional non-Board members to the Working Group overseeing the review, and are currently establishing a dedicated Project Team to do much of the detailed work. This team will have an independent chair and a majority of independent members.

The issues being considered in this review lie at the very heart of our relationship with our members and our ability to meet their needs going forward. We anticipate that we will present members with options for their consideration by the end of the next financial year.

As an industry body, any proposals for change will need to garner support from the broad base of our membership. Achieving this support will ensure NZW is well-positioned to support our members and the New Zealand wine brand through the next decade and beyond. For New Zealand that means more high-paying jobs and tourists, more high-value exports, a more sustainable industry. That is something all New Zealanders will be proud of.

Clive Jones *(Chair)* **Fabian Yukich** *(Deputy Chair)*

PROPHET'S ROCK, CENTRAL OTAGO

Cyclone Gabrielle

Impact and Response


PHOTO: DR DAVID JORDAN

With La Niña influences dominating weather patterns, in mid-February Cyclone Gabrielle brought exceptional rainfall and flooding to much of the North Island. For grape growers and wineries, the timing, right on the cusp of vintage, was particularly challenging. From a wine perspective, this was probably the single most significant weather impact since Cyclone Bola in 1988.

IMPACT

The damage to vineyards and wineries ranged from none to negligible to major. We estimate around 800 hectares of vineyards lost at least some, or all, of their fruit. In addition, another 300 hectares of vineyards experienced significant infrastructure damage on top of the crop loss.

Our best estimate is that up to 20,000 tonnes of grapes may have been lost due to the cyclone and related weather events. In Gisborne, the crop was 8,000 tonnes down on the previous year. In Hawke's Bay, crop losses were also significant but at least in part, the loss was offset by a better fruit set which masked the extent of the crop reduction. Unfortunately, many vineyard-related losses would not have been covered by insurance.

RESPONSE

Following the cyclone we initiated our emergency response procedures, coordinated by our Biosecurity and Emergency Response Manager, Sophie Badland. Key aspects of the response included:

- Liaison with MPI and other central government agencies, as well as other national industry bodies, which is still continuing five months on from the event.
- Working closely with Hawke's Bay and Gisborne Winegrowers to coordinate the response at the local level. NZW provided additional funding to Hawke's Bay Winegrowers to support their staff and relocated NZW staff to Hawke's Bay to assist. We also kept in regular contact with Gisborne Winegrowers through daily response meetings and visits to assist the response in that region.
- We secured funding from MPI to provide on-the-ground viticultural advice to affected members. The team of specialists coordinated by NZW Board member Emma Taylor and Dr David Jordan made 44 individual vineyard visits, held four shed meetings, and a vineyard walk. The ability of the team to provide experienced, independent, and timely advice was welcomed by members. Our sincere thanks to MPI for supporting this initiative.
- We are continuing to support affected members with free entry to our activities such as Grape Days and Spray Days, and a rebate on their SWNZ fees.

Combined, Hawke's Bay and Gisborne Winegrowers received donations totaling more than $400,000 to support affected grape growers and wineries.

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.

Our Advocacy activities focus on member guidance, wine standards, government engagement, intellectual property protection, growing our people, promoting social responsibility, and encouraging free and fair trade.

INTERNATIONAL TRADE

In June, New Zealander Dr John Barker was elected to the position of Director General of the International Organisation of Vine and Wine (OIV). The OIV issues recommendations on technical and scientific aspects of viticulture and winemaking, and NZW has the utmost confidence in Dr Barker's vision to grow and strengthen the organisation, so that it can effectively address key issues facing the sector. Dr Barker takes up the position in 2024 for a five-year term and is the first person from the Southern Hemisphere to ever hold the position.

On 31 May, the Free Trade Agreement between New Zealand and the United Kingdom came into force. This immediately removed all tariffs on New Zealand wine exports to that market and provided additional flexibility on labelling and winemaking.

We continue to monitor global labelling and winemaking developments and are mindful of their potential to add cost and complexity. Our team works to provide information and support to our members on these matters.

DUNCAN MARFELL, TRACTOR REPAIRS & SPARES AND LAURA MARSTON, CRAGGY RANGE AT THE 2022 YOUNG VIT NATIONAL FINAL. PHOTO: RICHARD BRIGGS

The Young Viticulturist and Young Winemaker of the Year competitions support our future leaders and bring together a special community of members and industry suppliers.

ALUN KILBY, 2022 YOUNG WINEMAKER OF THE YEAR

PHOTOS: RICHARD BRIGGS

TAHRYN MASON, 2022 YOUNG VITICULTURIST OF THE YEAR

WORKFORCE ACTIVITIES

In December, the Sustainable Workforce Action Plan was launched as a framework to guide NZW's workforce activities with, and for, our members.

With borders reopening, Vintage 2023 recruitment was a smoother process, with the welcome addition of international winery cellar hands. Accredited Employer Work Visa (AEWV) provided certainty of a pathway for skilled vintage workers, and we are gathering member feedback to inform Immigration New Zealand's evaluation of this visa.

The increase in the RSE cap to 19,000 has helped the New Zealand wine industry to plan with more certainty to meet seasonal work peaks and ensure we can continue to make premium-quality wine. The Advocacy team was involved in working groups of employers, unions, and industry to identify options for sick leave, bereavement leave, and independent employee support. We made a detailed submission on the RSE policy review and will remain involved in implementing any changes to the scheme, to ensure it delivers value for members.

The Hospitality-related Industry Fair Pay Agreement (FPA) application has been approved, and we will support those wine tourism businesses with occupations within the scope of this agreement to ensure their issues are addressed.

DOMESTIC REGULATORY FRAMEWORK

Container return scheme: The team has been closely monitoring the Government's proposals for a container return scheme. We support the overall objective of improving the recycling and recovery of glass, while expressing a preference for a 'glass out' and extended producer responsibility option. The Government has postponed decisions on the scheme until 2024.

Freshwater farm plans: In June, the Government released new regulations that include reporting requirements for managing risk to freshwater quality. Under these regulations, vineyards over five hectares will be required to have a plan that outlines risks to freshwater quality in their operation. The requirements will be rolled out region by region over the next two years.

We support the Government's goal to improve freshwater quality, which is consistent with our goals to be a world leader in efficient water use and water quality protection.

We support the Government's goal to improve freshwater quality, which is consistent with our goals to be a world leader in efficient water use and water quality protection. However, our view is that the proposals do not accurately reflect the low risk to water quality that viticulture poses. Therefore, we are concerned that the additional requirements will not deliver meaningful impacts for our industry, and will only add unnecessary costs.

We are committed to working with government and our members to streamline the implementation of these regulations for winegrowers in a cost effective and practical way, based on the risks posed. This includes exploring opportunities to utilise industry assurance programmes (like SWNZ) to support businesses to meet their obligations.

Alcohol licensing: We continue to engage with government about challenges faced by winegrowers under the Sale and Supply of Alcohol Act. A Private Members' Bill has been pulled from the ballot, which would address some of these challenges. We have also expressed concern about the proposed Sale and Supply of Alcohol (Community Participation) Amendment Bill and its potential unintended consequences for wine trails and cellar doors, which could negatively impact wine tourism across regions.

LEADERSHIP AND COMMUNITIES

Connection, encouragement, and care are key aspects of these initiatives. We strongly believe this supportive approach benefits both our industry and the individuals within it, and helps us build towards our future success.

The Young Viticulturist and Young Winemaker of the Year competitions support our future leaders and bring together a special community of members and industry suppliers.

The 2022 Young Viticulturist of the Year is Tahryn Mason from Indevin Group and the 2022 Young Winemaker of the Year was Alun Kilby from Marisco Vineyards.

The Women in Wine and NZW Mentoring Programmes, which run each year, continue to increase confidence and enthusiasm with our members.

NZW also ran the Go You! programme, which built on previous activities in this space. This year's programme focused on destigmatising mental health challenges, with a strong focus on the Mental Health Continuum and providing tools to make it easier for people to reach out and ask for help when they need it.

This year we also released a report on the gender pay gap in our sector, which showed a median average of 7.8% across the industry.. Knowledge is key, and investigating gender pay within our industry enables us to identify where there are changes that need to be made, so we can increase inclusivity and fairness for all. While our median average gap was below the national average, it was higher for some roles and there is work to be done. We continue to call upon our members to review their payrolls to find out their own pay gaps and commit to making changes to achieve equal pay for all.

Summary of submissions

Each year, NZW makes or contributes to many direct submissions to government or written policy proposals on a wide variety of matters. While the past year's submissions were primarily within New Zealand, we also submitted on some international issues.

For more information, please contact **advocacy@nzwine.com**

Research

BEYOND VINEYARD ECOSYSTEMS CONFERENCE

Bragato Research Institute (BRI) drives New Zealand's grape and wine research, innovation and extension, so the industry can make better business decisions and ensure New Zealand remains renowned for its exceptional wine.

The last 12 months have been transformational for BRI. Two major levy-funded programmes came to a close, the team grew to deliver more research, and new projects were launched.

VINEYARD ECOSYSTEMS PROGRAMME

The Vineyard Ecosystems Programme studied how management choices affect New Zealand vineyards, to promote more sustainable practices. Launched in 2015, it was a multi-year partnership between NZW and MBIE, and managed through BRI.

The programme concluded with the two-day Beyond Vineyard Ecosystems conference held at the Te Pae Christchurch Convention Centre in September 2022. The event brought researchers and winegrowers together to share programme findings on research-based approaches to sustainable vineyard management.

The thought-provoking event attracted 270 attendees and featured over 25 expert speakers and panellists. International speakers included Dr Andrew Neal, soil biology cluster lead at Rothamsted Research in the UK, and Richard Leask of Hither and Yon in McLaren Vale, Australia. In the post-conference survey, 92% of respondents said they had learnt something they now plan on implementing.

PINOT NOIR PROGRAMME

The Pinot Noir Programme aimed to help diversify New Zealand's wine industry by focusing on the production of its second-largest varietal, enabling high-quality Pinot Noir production at higher yields. The programme began in 2017 and ran to September 2022.

The event brought researchers and winegrowers together to share programme findings on research-based approaches to sustainable vineyard management.

In May and June, BRI began sharing the programme's findings with winemakers in a series of workshops on yield-quality interactions. Held in Marlborough, Wairarapa and Central Otago, the workshops delivered presentations from researchers inside the programme, as well as an international perspective from Dr Andrew Waterhouse from UC Davis. Participants also got to discuss and taste the 2022 research Pinot Noir vintage, led by local producers. Further activities to share the Pinot Noir programme findings are planned over the next three years.

SAUVIGNON BLANC GRAPEVINE IMPROVEMENT PROGRAMME

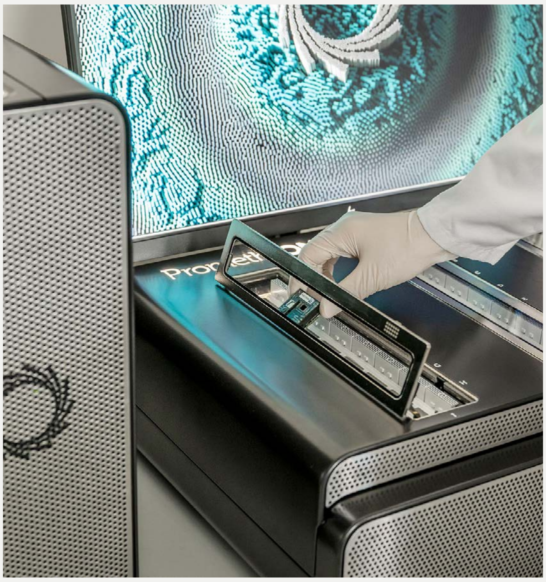
The objective of the innovative seven-year Sauvignon Blanc Grapevine Improvement Programme is to improve the sustainability, resilience, and growth potential of New Zealand's main variety by generating a large collection of diversity in Sauvignon Blanc and then screening these for vines that show improvements in key traits.

Funding includes $18.7 million between 2022 and 2028, including $6 million in NZW levies, $7.5 million from MPI, and individual contributions from wine companies.

The programme aims to create 12,000 entirely new variants of New Zealand Sauvignon Blanc, and then screen them to identify plants that exhibit useful traits selected by industry. To make our industry more resilient, the programme will select improvements in traits such as yield, resistance to fungal infection, frost tolerance and water-use efficiency, as well as vines that maintain the iconic Marlborough Sauvignon Blanc wine flavour profile.

NEW BRI ROOTSTOCK TRIAL

BRI is focused on grape and wine research that fills knowledge gaps specific to New Zealand's current and future needs. Rootstocks are an essential part of winegrowing, but the New Zealand industry lacks robust knowledge about the best rootstock to use for a particular planting situation. In October, BRI planted a 1,000-vine trial of 15 commercially available rootstocks, which will generate objective data to help inform future choices around which rootstocks to use where. The trial aims to identify rootstocks with qualities such as drought tolerance and water-use efficiency, which will help the industry adapt to a changing climate while maintaining the characteristic New Zealand wine styles that consumers expect. ▶



PROMETHION SEQUENCER

ROOTSTOCK PLANTING

The ferments allowed clients to trial different winemaking techniques, ingredients, or the impact of vineyard practices under tightly controlled conditions.

NZ WINE CENTRE OPENING

SOLOMON WANTE, NATIONAL VINE COLLECTION AT LINCOLN

GROWING THE GRAPEVINE IMPROVEMENT LABORATORY

The BRI Grapevine Improvement Laboratory is based at Lincoln University in Canterbury. This year, six highly skilled research staff joined Principal Scientist Dr Darrell Lizamore to help deliver the Sauvignon Blanc 2.0 programme, manage the National Grapevine Collection, and deliver a range of other grapevine projects and services.

The laboratory contains New Zealand's only high-throughput third-generation DNA sequencer. The Oxford Nanopore PromethION Sequencer enables BRI to rapidly generate and analyse the complex genetic code that reveals genetic differences among grapevines. This knowledge will enable BRI to identify and make available more resilient vines better suited to New Zealand conditions.

BRI also offers sequencing and analysis as a commercial service and is working with collaborators across different industries to bring this enabling technology to diverse research challenges. The revenue BRI generates from offering this premium service will be reinvested into delivering more grape and wine research and extension.

RESEARCH WINERY AND COMMERCIAL SERVICES

During Vintage 2023, the Research Winery processed 8.5 tonnes of grapes and undertook 203 individual ferments for industry clients and BRI research projects. This is the fourth year of consecutive growth at the winery. The ferments allowed clients to trial different winemaking techniques, ingredients, or the impact of vineyard practices under tightly controlled conditions—all while freeing busy commercial winemakers from the stress of managing a winemaking trial during vintage.

BRI now offers a growing range of commercial services that are specific to the industry and available to NZW members and non-members. This year, BRI began offering commercial viticultural trial design and delivery services, leveraging the capabilities and connections of the viticulture and extension team. This service joins the Research Winery services and the genomic testing and sequencing at the Grapevine Improvement Laboratory in BRI's commercial offerings. Like the sequencing service, BRI invests any profits back into research.

Research projects

In addition, BRI has over 30 research projects underway. Some of these include:

Long spur pruning as an alternative to cane pruning	The combination of increasing production costs and a constrained labour supply signal a need to explore alternative production systems for Sauvignon Blanc. This project compares long spur pruning as an alternative to cane pruning for Sauvignon Blanc in Marlborough as it shows promise.
Improving remedial surgery practices for control of grapevine trunk disease to increase vineyard longevity	Grapevine trunk diseases are becoming more prevalent in New Zealand as vineyards age, causing significant yield and quality reductions. This project aims to establish the optimal stage of disease progression and season to conduct remedial surgery.
Evaluating ecologically sustainable ways to disrupt the wine wētā-vine association	The endemic ground wētā affects grape growing in the Awatere Valley vineyards. This project seeks to develop an environmentally and economically sustainable response, where vineyards and the ground wētā can co-exist.
Tuned Vines	This two-year project aims to demonstrate ways to manage grapevines by identifying the epigenetic markers of environmental stress in grapevines and then 'tune' their behaviour (e.g. delay ripening in a hot summer) by turning specific genes 'on or off', using a technique that would not be considered genetic modification.
Precipitation of calcium tartrate and other compounds in wine	This project aims to provide an effective modelling tool to predict precipitates. This will enable winemakers to exercise knowledgeable prevention and intervention, ensuring a quality product.
Exploring reductive aromas in Pinot Noir	This project is investigating factors that contribute to the formation and accumulation of sulfurous off-flavours and aromas in Pinot Noir, and will develop a model to inform better winemaking decisions.

To find out more about BRI's research projects, visit **bri.co.nz/current-research**

Environment

Care and respect for the natural environment is practised by wineries and growers throughout Aotearoa New Zealand and exemplified through kaitiakitanga—the guardianship of the land—and ensuring it is protected for future generations to come.

PEOPLE

Our focus on sustainability demonstrates our commitment to the future across six key focus areas: water, waste, plant protection, soil, people, and climate change. The NZW Environment Strategy identifies a key goal for each focus area and NZW delivers two key programmes to help drive the industry towards these goals: Sustainable Winegrowing New Zealand (SWNZ) and Biosecurity.

The Government has sought to implement a series of significant environmental reforms in this electoral term. Much of NZW's work has been focused on engaging with the Government's reform programme. Increasingly, there is a need to work with the Government to drive progress on significant sustainability issues. One of our key focuses this year has been to demonstrate how SWNZ can help our members to meet new government requirements regarding freshwater farm planning, and this work will continue to be a high priority in the coming months.

STREAMLINING AND STRENGTHENING SWNZ

SWNZ is widely recognised as a world-leading sustainability programme and was one of the

2022 SPRAY DAYS

‘Supercharging SWNZ’ has focused on a technical analysis against central government’s new freshwater farm plans.

first to be established in the wine world. Today, 96% of total vineyard area in New Zealand is certified as sustainable through SWNZ, and approximately 90% of New Zealand wine is produced in SWNZ-certified facilities. To ensure we remain a global leader in this space, SWNZ must continue to be robust and operate with high integrity, ensuring that our certification standards are trusted by New Zealanders and consumers in our key export markets.

Over the past 12 months, key steps have been taken to streamline the programme while protecting and enhancing its robustness. Through a partnership with MPI, a project titled Supercharging SWNZ has been a major focus over the past year.

Supercharging SWNZ has focused on a technical analysis of SWNZ against central government’s new freshwater farm plan regulations, as well as enhancing the depth and quality of the SWNZ national reports and producing new regional reports. These reports are based on data collected through SWNZ questionnaire and spray diary submissions.

The technical analysis of SWNZ is in its final stages with the release of the final freshwater farm plan regulations in May 2023. NZW is using the results of this analysis to advocate with the Ministry for the Environment that industry assurance programmes like SWNZ can play a greater role in assisting farmers and growers to meet these new regulations than the Government has realised. This important work will continue throughout the coming year.

The Supercharging SWNZ project has also enabled enhancements to the annual SWNZ national reports on plant protection, water use, and greenhouse gas emissions. In addition, this project has resulted in regional reports being developed for the first time. These regional reports will help members engage with stakeholders and regulators in their region on the environmental footprint of the wine industry. These SWNZ reports will continue to be refined and enhanced over the next two years with continued contribution from MPI.

This year, the separate SWNZ offshore bottling membership category was removed and questions regarding offshore bottling were incorporated into the SWNZ winery category. This move will decrease costs and ease the administrative burden for SWNZ members who bottle wine offshore while enhancing the strength of the programme.

2023 also marks the year that SWNZ membership fees were raised for the first time in nearly two decades, a necessary measure ▸

2022 SPRAY DAYS

This year, Spray Days will return to each winegrowing region with a focus on the key 'get rights' for successful plant protection in the vineyard.

PLANT PROTECTION

to ensure the programme remains financially sustainable. At the same time, a pathway for financial relief was created for members in the North Island impacted by adverse weather events, such as Cyclone Gabrielle.

The Spray Days roadshow continues to be a major success with nearly 700 members throughout New Zealand registering for a regional event in 2022. This year, Spray Days will return to each winegrowing region with a focus on the key 'get rights' for successful plant protection in the vineyard. These events

WASTE

are highly valued by members and allow growers to connect with leading industry experts in the field.

BIOSECURITY AND EMERGENCY RESPONSE

2023 has been a big year for biosecurity readiness, with the NZW Board signing two new operational agreements to boost readiness for Xylella fastidiosa, one of our highest risk biosecurity threats, and unwanted Lepidopteran pests such as European grapevine moth. In addition, the Operational Agreement for Brown Marmorated Stink Bug (BMSB), another of our highest risk threats, was renegotiated for a further five-year term. Furthermore, the NZW Biosecurity and Emergency Response Manager was elected to chair the BMSB Council, an important role in driving work forward in this area.

These agreements were negotiated as part of the Government Industry Agreement (GIA) for biosecurity readiness and response. Our industry has been a GIA partner since 2017 and it remains the best way to influence the Government and other industry partners to manage risk through improved post-border biosecurity.

The NZW Biosecurity team also has a key emergency response function. The team was deployed to Hawke's Bay in the wake of Cyclone Gabrielle to provide additional resource, support members, assist by connecting with government responders, and ensure ongoing communication between NZW and the impacted regional associations—Hawke's Bay Winegrowers and Gisborne Winegrowers. The cyclone response highlighted the importance of strong links between NZW and regional winegrowing organisations and will be reviewed over the coming months to ensure learnings are captured for future events.

The Biosecurity team also continues to focus on raising members' awareness of biosecurity

The cyclone response highlighted the importance of strong links between NZW and regional winegrowing organisations.

risks and encouraging all members to complete and implement biosecurity plans for their vineyards, along with annually completing the Biosecurity Vineyard Register. These are the most important actions members can take to mitigate biosecurity risk on their property.

ORGANIC WINEGROWERS NEW ZEALAND

Membership of OWNZ, the industry association for growers practising or interested in organic production, rose this year to an all-time high of 240 member companies. OWNZ works with the support and collaboration of NZW to promote and support organic grape and wine production in New Zealand.

Organic production is attracting more interest than ever within the New Zealand wine industry. The fourth Organic and Biodynamic Winegrowing Conference drew nearly 400 attendees to Marlborough in June for three days of learning, networking, and wine tasting. More than 120 wine brands were represented at the conference.

Other OWNZ events for growers, trade, and consumers also continued this year. These included a series of regional spring seminars on regenerative organic viticulture, and the annual celebration of Organic Wine Week, generating tasting events and organic wine publicity in Aotearoa New Zealand and overseas.

A milestone for the organic industry in 2023 was the passage of the Organic Products and Production Bill through Parliament. This Bill will add government assurance to organic certifications in New Zealand. Its passage was heralded by organic industry leaders as an important step in improving trust and international market access for New Zealand organic products.


CRAGGY RANGE, HAWKES BAY

Submissions to Government

November 2022: Environment Protection Authority's Call for Information on Fluazinam.

December 2022: Reassessment of the insecticide Actara.

December 2022: Proposed amendments to the import health standards for fresh table grapes from Chile, the Republic of Korea, and the US—California.

February 2023: NZW submission on draft freshwater farm plan regulations.

March 2023: Biosecurity (Information for Incoming Passengers) Amendment Act 2022.

> "What a truly outstanding wine region, I've been thinking about it non-stop, and getting some tastings on to teach the team members (and of course customers)."
>
> – Colleen Haggarty, Wine Merchant, Dan Murphy's, Melbourne


SOMEWHAT SOMMIT EVENT

With the pandemic behind us and New Zealand's borders opening in August 2022, the NZW Marketing team was able to move out of the virtual world and return to direct engagement with our audiences in our key markets.

Sharing our refreshed New Zealand Wine brand story, with its new visual identity to reinforce our global premium positioning, has hugely enhanced our return to action.

NEW ZEALAND WINE, ALTOGETHER UNIQUE

The refreshed New Zealand Wine brand story, designed to support the ongoing premiumisation of New Zealand Wine and define what sets us apart from the rest of the world, was launched in January 2023 as a new global brand platform: New Zealand Wine, Altogether Unique. This was the result of a detailed process to define the 'brand essence' of New Zealand Wine and go beyond the previously used differentiators of premium, diverse, and sustainable, to develop a deeper narrative around how the New Zealand Wine brand should make you feel.

To embody the brand essence, a bold, modern brand marque incorporating an inimitable sense of 'New Zealand-ness' was created. Its three circular forms signify the three pillars of the brand essence, in an organic manner reminiscent of tendrils on a grapevine, and in combination resembles a bunch of grapes.

To bring the New Zealand Wine brand essence to life, a short video was created that aimed to create an emotional connection to New Zealand Wine. ▸

The refreshed New Zealand Wine brand story was launched in January 2023 as a new global brand platform: **New Zealand Wine, Altogether Unique.**

BRINGING NEW ZEALAND TO NORTH AMERICA EVENT

I had an amazing time, learned so much about the region and subsequently want to plan a trip there to experience the wine region first-hand. I really felt the passion of the winemakers, and their belief in their wines.

- US attendee, Bringing New Zealand to North America

This asset tells the story of New Zealand Wine through the lens of the key pillars of Purity, Innovation and Care, which together make New Zealand Wine, Altogether Unique. We were delighted that one of our members, Sir Sam Neill, generously supported us in the creation of this video.

THE STRENGTH OF COLLABORATION

In November 2022, a series of NZW Marketing Hui were conducted across New Zealand wine regions to share plans face-to-face, as well as in-depth detail on how the refreshed New Zealand Wine brand platform was defined and tested in consumer research. Engaging with our members and encouraging alignment of our New Zealand Wine brand message globally remains a key objective.

Leveraging partnerships to widen the reach of the New Zealand Wine brand also remained a key priority. Throughout the year, NZW worked with NZTE in key export markets to continue to drive awareness and preference for New Zealand wine largely via the Made with Care campaign, now in its third year. This support from NZTE is particularly apparent in the Australia market, where its Melbourne Commercial Business Advisor, Catherine Wansink, is seconded to NZW part-time to support Australia market objectives.

FRESH REASONS TO TURN HEADS TO NEW ZEALAND WINE

Since the beginning of 2023, it has been an exciting time activating the Altogether Unique brand platform across NZW key markets. Kicking off with the third New Zealand Wine Week (NZWW) in February, content from the week reached almost 1,700 trade who tuned in from over 40 countries, via five global webinar sessions and five live events across Los Angeles, London, Dublin, Stockholm, and Toronto. The London Annual Trade Tasting was part of NZWW, and as the longest-running New Zealand Wine event, it was the perfect opportunity for it to be the first live event to showcase the Altogether Unique brand identity.

ProWein was another major opportunity to unveil the new visual identity, with close to 50,000 visitors attending from over 60 countries. As well as the exhibitors at the New Zealand Wine Pavilion, there was a significant presence of New Zealand wineries exhibiting independently or with their local importers, making it the largest presence of New Zealand wineries at the event to date. In total, over 80 producers were represented, with more than 500 wines available to taste.

For the second year, in May NZW ran Pour Yourself a Glass of New Zealand, a campaign that celebrates New Zealand's white wine varieties and coincides with International Sauvignon Blanc, Pinot Gris and Chardonnay Days which all fall in May. This campaign also contained a fun element to secure the White Wine Emoji. The campaign was once again a success, reaching 79 million people and generating an equivalent advertising value of $2.1 million.

Nearing the end of the financial year, activations for Altogether Unique have taken place in all NZW key markets. In May, the China three-city Altogether Unique Roadshow showcased close to 80 New Zealand wine brands to 2,200 Chinese trade and consumers in Beijing, Shenzhen, and Shanghai.

In June, NZW partnered with Sommeliers Australia to host the Somewhat Sommit, a sommelier event based on the original Sommit™ format and held in-market for the first time. Participation was by application only with 28 sommeliers participating across Melbourne and Brisbane and hosted by Cameron Douglas MS and Stephen Wong MW. A subsequent trade tasting was held in each city which attracted 80 attendees from Australian media and trade.

Also in June, our North America team could finally combine forces to host the inaugural NZW Bringing New Zealand to North America event, which had originally been planned for 2020 but was thwarted by the pandemic. An immersive three-day, two-night NZW experience was held in the Hudson River Valley for 20 top-tier media and trade from across the US and Canada. Set in rural green environs close to water reminiscent of 'home', it was led by six winemakers and viticulturists who generously gave their time to NZW whilst in the US supporting their brands.

With all markets now reopened and a fresh NZW brand platform established, NZW is well poised to deliver programmes to protect and enhance the strength of the New Zealand Wine brand.

> **In order to more accurately reflect the work of the NZW Marketing team, its name will change to the NZW Brand team moving forward.**

MARKETING ACTIVITY

The Numbers

Global PR Programme

The NZW Global PR Programme ensures that New Zealand Wine continues to be a vibrant part of the global media conversation with key metrics growing year on year.

MEDIA IMPRESSIONS
161

REACH
416
MILLION

EQUIVALENT ADVERTISING VALUE
$12.5
MILLION

International Education Programme

The NZW International Education Programme is a category development initiative designed to influence decision-makers across on-premise, off-premise, importer and distributor, by educating them on the unique and profitable offering that New Zealand wine presents.

51
EDUCATIONAL INITIATIVES

559
INDIVIDUAL WINES POURED IN EDUCATIONAL ACTIVITIES

845
WINES ENTERED INTO THE BLIND TASTING

3,259
TRADE AND MEDIA REACHED THROUGH THE EDUCATION PROGRAMME

11,491
UNIQUE VIEWS ACROSS THE NZW TRADE HUB

SOMEWHAT SOMMIT EVENT

Statement of service performance

For the year ended 30 June 2023

Who we are	New Zealand Winegrowers Inc is the national organisation of and for the members of the New Zealand grape and wine industry.
Our vision	Around the world, New Zealand is renowned for our exceptional wines.
Our mission	To create enduring value for our members.
Our purpose	To protect and enhance the reputation of New Zealand wine. / To support the sustainable diversified value growth of New Zealand wine.

Our strategic priorities (2022-2028)

1. Engagement with key audiences that influence the market, e.g. government and media influencers etc.
2. Provision of information, development of tools and platforms to support members.
3. Research of key issues.

Advocacy

Our purpose is to protect and enhance our members' ability to produce, market, and sell New Zealand wine sustainably and competitively.

16
SUBMISSIONS TO GOVERNMENT*
Submissions to government on policies impacting the industry.
(2022 - 17)

7
MEMBER WEBINARS HELD*
Topics included Labelling and Winemaking Practices and updates to Wine Standards Management Plans.
(2022 - 11)

PEOPLE*
Annual competitions and programmes to develop leaders and talent in the industry.

Number of participants

Young Viticulturist New Zealand Wine
39 ENTRANTS
(2022 - 42)

Young Winemaker New Zealand Wine
24 ENTRANTS
(2022 - 20)

NZW Mentoring Programme
12 MENTEES **12** MENTORS
(2022 - 18 mentees, 18 mentors)

Women in Wine
11 MENTEES **11** MENTORS
(2022 - 11 mentees, 11 mentors)

Marketing

Providing a deeper understanding of New Zealand wine and informing members.

Intel & Insights provide market information to help members build capacity for business sustainability.

ONLINE BRANDING TOOLKITS
To support members to convey a consistent, strong image of New Zealand wine.

9
TOOLKITS*
were available to members including our brand story

4,753
DOWNLOADS*
(2022 - 7 toolkits, 1,842 downloads)

WEBINAR PROGRAMME
Interactive delivery of market information.

reached **565** MEMBERS
with satisfaction rates at **95%** ▲ 71%

3,515
Unique number of individuals who viewed pages in our Intel & Insights section*
(2022 - 2,405)

Bottlebooks

NZW uses Bottlebooks, a centralised global database, to deliver information on various wines, producers, and brands.

242 PRODUCERS/BRANDS REGISTERED ▼ 4%

1,595 WINES REGISTERED ▲ 4.5%

Environment

New Zealand wines' sustainability credentials are essential to our license to operate. Our role is to support our members to maintain sustainable practices.

1,783
VINEYARDS ARE **SWNZ CERTIFIED***
(2022 - 1,796)

307
WINERIES ARE **SWNZ CERTIFIED***
(2022 - 298)

Sustainable Winegrowing New Zealand (SWNZ) is an industry-wide certification programme run by NZW. All members must complete annual submissions and undergo regular audits conducted by an independent verification agency.

Government Industry Agreements (GIAs) enable signatories to share the decision-making, responsibilities, and costs of preparing for and responding to biosecurity incursions.

NZW IS A SIGNATORY TO
4 GIA AGREEMENTS*
(2022 - 3)

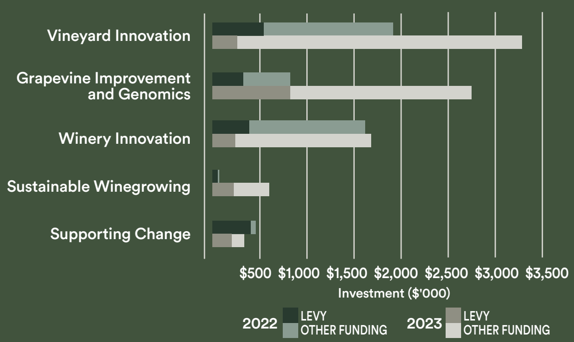
> *"As a multi-generation farming business, leaving the land in a better place for the next generation is critical to who we are. SWNZ gives our business a framework to measure our impact against our goals and to enable us to continually improve. We are proud to be members of SWNZ and appreciate the value it creates for New Zealand wine on the international stage with discerning consumers."*
>
> Ben McLauchlan, Owner Rothay Vineyards, Marlborough NZ

Research

We drive New Zealand's grape and wine research, innovation, and knowledge transfer so our members can make better business decisions and ensure New Zealand remains renowned for its exceptional wine.

We invest across three core themes—Vineyard Innovation, Grapevine Improvement and Genomics, and Winery Innovation, supported by our cross-cutting focus on Sustainable Winegrowing, and Supporting Change.

FUNDING APPLIED TO RESEARCH PROJECTS, BY RESEARCH THEME ($'000)*



Total volume of grapes processed
8.5 tonnes
9.0% ▲ from V22

Tonnes by variety 2023
% TOTAL PRODUCTION

SAUVIGNON BLANC	**66%**
PINOT NOIR	**16%**
CHARDONNAY	**7%**
PINOT GRIS	**6%**
RIESLING	**3%**
LAGREIN	**1%**
ALBARIÑO	**1%**

25 TRIALS*
▲ **14%**

INCLUDING
203 FERMENTS
▲ **5.7%**

TRIALS BY*

5 INTERNATIONAL COMPANIES (2022 - 7)

14 NEW ZEALAND WINE BUSINESSES (2022 - 7)

2 UNIVERSITIES (2022 - 2)

4 BRI TRIALS (2022 - 6)

OUR RESEARCH WINERY DE-RISKS INNOVATION
Our custom-designed winery lets winegrowers trial new vineyard and winemaking ideas at small scale under tightly controlled experimental conditions.

Communication

Talking to our members across all our areas of activity.

OPENING RATES

WHAT'S FERMENTING Our monthly newsletter	VINEFACTS Provides weather and phenology data through the growing season	ADVOCACY UPDATES	MARKETING UPDATES	ENVIRONMENT UPDATES
47.0%	51.6%	50.8%	56.8%	56.7%
▲ 9.4%	▲ 8.7%	▲ 1.1%	▲ 17.3%	▲ 11.8%

REGISTRATIONS*

spray days learn | protect | thrive

An education extension event to promote best practice in viticulture and agrichemical usage. Held in all nine key wine regions.

663
(2022 - 902)

Judgements - New Zealand Winegrowers service performance metrics are consistent with, and linked to, the entity's purpose and strategies.
The service performance information reported above is consistent with information used by the Board, committees, and management for internal decision-making.
New Zealand Winegrowers has discretion over the measurement, aggregation and presentation of service performance only to the extent the measures relate to the entity's strategy and purpose.
Basis for preparation - Unless otherwise stated the service performance data is for the full year from 1 July 2022 to 30 June 2023 (with comparatives presented for the full year ended 30 June 2022).

** These statistics have been audited by KPMG.*

Financials

High-level breakdown (year to 30 June 2023)

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 Research Centre Limited trading as BRI and GVI Limited Partnership (GVI LP).

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, SWNZ, provision for the Wine Export Certification Service, and Young Viticulturist and Young Winemaker competitions.

BRI provides world-leading science, research, and innovation to benefit New Zealand's entire grape and wine industry.

GVI LP is managing a research programme to develop and select new and improved variants of our existing Sauvignon Blanc clones.

The financial information presented has been extracted from the audited financial statements of NZW for the year ended 30 June 2023.

OPERATING INCOME

$21.7m
↑28%

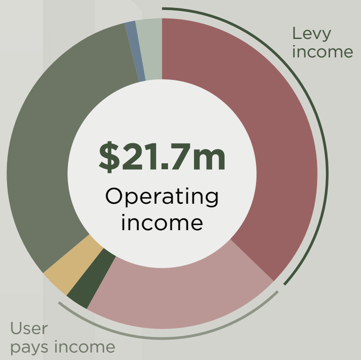
EXPENDITURE

$20.1m
↑23%

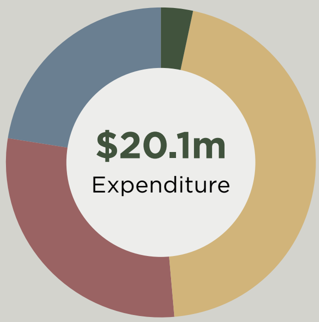
ASSETS/RESERVES

$14.3m

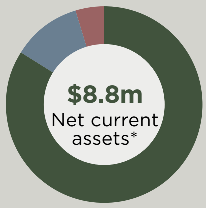
OPERATING INCOME AND RESERVES SUMMARIES



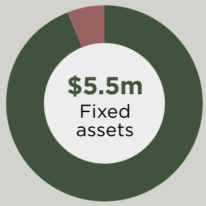
- Wine levy $8.1m ↑15%
- Grape levy $4.5m (no change)
- Marketing user pays $0.6m ↑84%
- SWNZ $0.7m ↑3659%
- External funding for research $7.0m ↑50%
- Young Vit & Winemaker $0.2m ↑4%
- Other $0.6m ↑189%



- Social $0.7m ↓35%
- Economic $9.1m ↑12%
- Environmental $5.8m ↑73%
- General $4.5m ↑19%



- Levy incl BRI $7.4m
- Biosecurity $1m
- User pays $0.4m



- Winery incl fitout and equip $4.8m
- Other $0.3m

* Current assets less total liabilities

Breakdown of expenditure by objective

Key achievements	Levy	Non-levy
Research and innovation Research Winery (200 ferments processed)	$2.5m ↓1%	$4.8m ↑29%
International marketing and tourism Altogether Unique launched Global PR and media outreach International event programme resumed	$2.1m ↑10%	$0.6m ↑161%
Administration IT Project Kārearea	$3.2m ↑64%	$0.6m ↑36%
Events in New Zealand	$0.1m ↑8%	$0.05m ↓6%
Environment SWNZ programme Spray Days	$0.8m ↓42%	$1.0m ↑1257%
Member information	$1.3m ↑12%	
Regions Geographical Indications renewed	$1.3m ↑23%	
International trade (advocacy) UK and EU free trade agreements Dr John Barker elected OIV Director General	$0.3m ↑35%	$0.1m ↓25%
Domestic trade (advocacy) 16 domestic submissions to government	$0.5m ↓14%	
People Women in Wine Labour strategy and RSE Young Viticulturist and Young Winemaker competitions	$0.2m ↑12%	$0.2m ↑4%
Biosecurity 2 biosecurity readiness operational agreements signed 3 submissions to government	$0.3m ↑8%	
Total	$12.7m ↑11%	$7.4m ↑52%
Total expenditure		$20.1m ↑23%

Statistics

Summary of New Zealand wine (2014-2023)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Number of wineries	699	673	675	677	697	716	717	731	744	739
Number of growers	858	762	747	726	699	692	694	732	706	681
Producing area (hectares)	35,510	35,463	36,226	36,943	38,073	39,061	39,934	40,949	41,304	*41,860
Average yield (tonnes per hectare)	12.6	9.1	12.0	10.7	11.0	10.7	11.4	9.2	12.9	12.0
Average grape price (NZ$ per tonne)	1,666	1,732	1,807	1,752	1,841	1,890	1,920	2,025	2,261	N/A
Tonnes crushed (thousands of tonnes)	445	326	436	396	419	413	457	370	532	501
Total production (millions of litres)	320.4	234.7	313.9	285.1	301.7	297.4	329.04	266.4	383.0	360.7
Domestic sales of NZ wine (millions of litres)	49.9	61.9	56.2	52.1	53.6	50.6	50.0	49.2	40.6	*42.9
Consumption per capita NZ wine (litres)	11.2	13.7	12.2	11.0	10.9	10.3	10.0	9.6	7.9	*8.3
Total domestic sales of all wine (millions of litres)	90.6	96.0	93.4	92.0	94.5	93.1	91.7	90.2	89.0	*85.8
Consumption per capita all wines (litres)	20.3	21.2	20.2	19.5	19.2	18.9	18.3	17.7	17.4	*16.6
Export volume (millions of litres)	186.9	209.4	213.4	253.0	255.0	270.4	286.5	284.9	266.1	315.8
Export value (millions of NZ$ FOB)	1,328	1,424	1,570	1,663	1,705	1,825	1,923	1,870	1,953	2,405

N/A – Not yet available
*Estimate **Earlier years' vineyard numbers can be found on the website: https://www.nzwine.com/en/media/statistics/vineyard-reports/

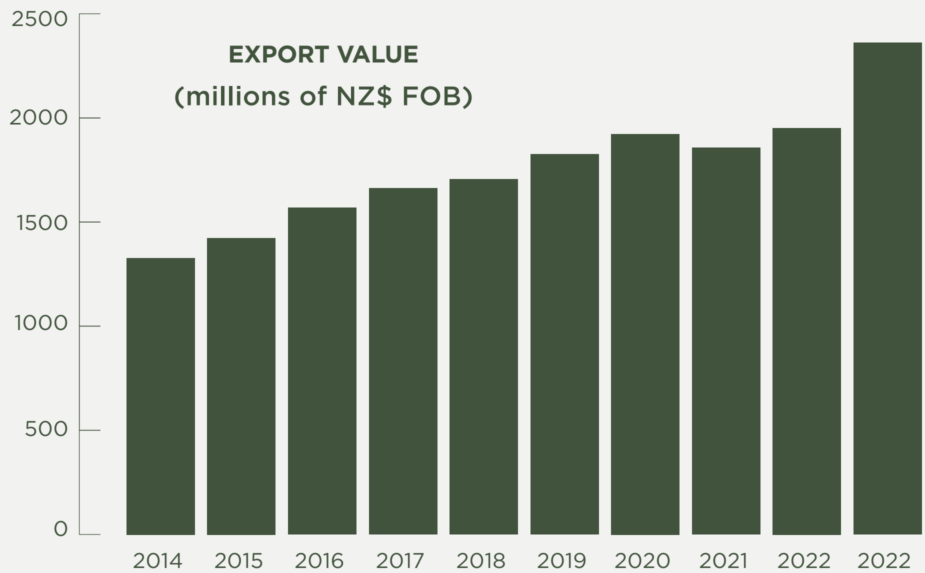
PRODUCING AREA (ha)

2014

35,510

2023

41,860*



New Zealand Winegrowers membership (2014-2023)

Wineries by size	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Small	611	587	581	582	603	624	628	645	662	646
Medium	65	69	78	77	77	73	69	67	66	75
Large	23	17	16	18	17	19	20	19	16	18
Total	**699**	**673**	**675**	**677**	**697**	**716**	**717**	**731**	**744**	**739**

Category 1 (Small)—annual sales not exceeding 200,000 litres. Category 2 (Medium)—annual sales between 200,000 and 4,000,000 litres.
Categroy 3 (Large)—annual sales exceeding 4,000,000 litres.

Wineries by region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Northland	15	14	15	16	17	20	20	18	17	17
Auckland	114	111	110	109	102	100	99	99	98	93
Waikato/Bay of Plenty	13	12	9	8	10	7	9	8	6	6
Gisborne	19	18	18	18	17	16	15	33	37	37
Hawke's Bay	76	75	76	79	91	98	100	104	107	106
Wairarapa	67	67	68	64	69	72	67	67	67	69
Marlborough	151	140	141	139	141	150	158	159	160	163
Nelson	37	35	36	36	38	42	38	35	37	35
North Canterbury	66	67	64	65	67	68	71	68	71	64
Central Otago	132	127	133	137	136	135	133	134	137	143
Waitaki Valley					4	4	4	3	4	3
Other areas	9	7	5	6	5	4	3	3	3	3
Total	**699**	**673**	**675**	**677**	**697**	**716**	**717**	**731**	**744**	**739**

Grape growers by region	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Northland							4	4	3	5
Auckland	11	10	5	4	3	8	5	5	5	4
Waikato/Bay of Plenty										
Gisborne	48	41	41	36	33	31	27	14	12	12
Hawke’s Bay	102	74	71	65	62	58	57	65	59	50
Wairarapa	17	14	15	17	13	14	14	19	25	18
Marlborough	581	535	534	519	510	509	514	531	518	513
Nelson	52	38	36	37	35	27	27	32	31	27
North Canterbury	15	18	14	14	9	13	10	19	15	16
Otago	32	32	31							
Central Otago				33	33	32	36	43	38	36
Waitaki Valley				1	1					
Total	**858**	**762**	**747**	**726**	**699**	**692**	**694**	**732**	**706**	**681**

Auckland and Northland are reported separately from 2020

Statistics

New Zealand producing vineyard area (2014-2023)

By grape variety (ha)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*
Sauvignon Blanc	20,029	20,497	21,400	22,230	23,426	24,605	25,160	25,988	26,559	**27,084**
Pinot Noir	5,509	5,514	5,519	5,572	5,588	5,549	5,642	5,805	5,807	**5,678**
Chardonnay	3,346	3,117	3,116	3,114	3,106	3,179	3,222	3,186	3,187	**3,149**
Pinot Gris	2,451	2,422	2,439	2,369	2,471	2,413	2,593	2,766	2,809	**2,797**
Merlot	1,290	1,239	1,198	1,211	1,133	1,093	1,087	1,078	1,077	**1,061**
Riesling	784	767	753	721	679	572	569	620	619	**595**
Syrah	433	436	426	439	432	440	437	433	444	**443**
Cabernet Sauvignon	289	275	253	249	250	216	219	207	207	**204**
Gewürztraminer	376	277	242	229	221	206	217	186	197	**192**
Malbec	127	129	119	121	114	111	111	98	98	**95**
Sauvignon Gris**		104	113	109	105	105	105	102	102	**73**
Cabernet Franc	113	109	99	91	97	91	93	91	91	**92**
Viognier**		129	119	97	97	89	85	69	65	**63**
Other varieties	764	448	430	391	354	394	395	320	327	**334**
TOTAL	**35,511**	**35,463**	**36,226**	**36,943**	**38,073**	**39,061**	**39,934**	**40,949**	**41,304**	**41,860**

By region (ha)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*
Northland						73	71	75	76	73
Auckland						313	319	283	285	276
Auckland/Northland	392	403	387	387	392					
Waikato/Bay of Plenty	25	16	3	13	15	12	12	13	13	13
Gisborne	1,915	1,440	1,350	1,246	1,181	1,163	1,191	1,221	1,245	1,300
Hawke's Bay	4,774	4,638	4,641	4,615	4,678	4,883	**5,034	4,737	4,786	4,805
Wairarapa	995	1,003	1,005	932	969	1,030	1,039	1,089	1,090	1,089
Marlborough	22,907	23,452	24,365	25,244	26,288	27,176	27,808	28,883	29,415	29,654
Nelson	1,123	1,141	1,135	1,093	1,162	1,105	1,102	1,086	1,082	1,080
North Canterbury	1,488	1,428	1,419	1,472	1,457	1,368	1,369	1,489	1,497	1,464
Central Otago	1,932	1,942	1,880	1,886	1,873	1,875	1,930	2,029	2,055	2,054
Waitaki Valley			41	55	58	63	59	58	59	52
TOTAL	**35,511**	**35,463**	**36,226**	**36,943**	**38,073**	**39,061**	**39,934**	**40,962**	**41,304**	**41,860**

**Projections submitted in the 2023 Vineyard Report. As this report was compiled from data submitted in 2022, prior to the event of Cyclone Gabrielle in early 2023, figures for cyclone-affected regions may have changed since data was collected.

**The Hawke's Bay figures within the 2020 Annual Report contained an error that has since been corrected in 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 from 2019.

Central Otago and Waitaki Valley reported separately from 2016.

Source: New Zealand Winegrowers Vineyard Register Reports

Predictions for 2023-2025 within this document are based on data collected from NZW members in the 2022 Biosecurity Vineyard Register. It is noted that the actual production area for 2022 as used in this report differs from predictions in the previous year's report by ~300 hectares. This may be due to a number of factors and despite having double checked this year's data, a clear reason for the discrepancy was unable to be identified.

New Zealand vintages (2014-2023)

By grape variety (tonnes)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Sauvignon Blanc	310,240	216,078	303,711	285,862	296,573	302,157	326,058	268,079	393,956	378,300
Pinot Noir	36,499	25,763	35,661	28,760	35,095	26,944	34,105	22,029	34,569	30,532
Pinot Gris	23,880	19,707	24,892	20,755	22,824	20,953	28,849	20,987	30,465	26,097
Chardonnay	28,985	27,015	29,162	26,843	26,371	25,729	27,568	23,507	29,762	22,528
Merlot	10,756	9,397	9,321	7,714	10,623	9,240	11,166	9,877	7,535	9,092
Riesling	6,013	4,535	5,937	3,880	3,776	4,776	4,510	4,407	5,024	6,001
Rosé								530	4,518	3,957
Syrah	2,178	1,497	1,756	1,733	2,126	2,230	2,392	2,537	2,104	2,072
Cabernet Sauvignon	1,742	1,376	1,537	974	1,169	1,076	1,210	1,156	834	1,020
Sauvignon Gris			1,182	944	1,080	1,002	880	1,178	1,161	947
Gewürztraminer	2,264	1,761	2,221	1,047	976	834	1,167	707	1,179	766
Malbec	1,135	586	483	697	782	741	793	535	663	656
Grüner Veltliner	341	228	276	253	329	347	369	275	490	546
Cabernet Franc	582	485	616	373	350	473	452	458	472	507
Other Reds	537	457	677	401	456	506	522	540	526	444
Albariño					162	269	284	371	451	380
Viognier	1,148	720	771	266	444	318	235	488	282	347
Semillon	507	425	466	249	385	304	292	289	263	215
Other Whites	1,646	1,294	727	824	250	232	271	144	193	128
Pinotage	425	494	374	145	153	142	122	96	131	87
Muscat Varieties	455	301	329	450	323	200	234	33	84	27
Arneis	336	268	257	239	152	91	162	91	86	12
Survey total	**429,669**	**312,387**	**420,356**	**382,409**	**404,399**	**398,564**	**441,640**	**358,316**	**514,749**	**484,662**
Industry total*	**445,000**	**326,000**	**436,000**	**396,000**	**419,000**	**413,000**	**457,000**	**370,000**	**532,000**	**501,000**

By region (tonnes)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Northland	210	203	92	121	113	319	269	248	195	182
Auckland	1,392	824	1,267	934	787	1,585	1,249	1,239	1,343	709
Gisborne	16,192	17,280	15,944	16,337	13,000	16,238	18,959	17,450	19,334	10,967
Hawke's Bay	44,502	36,057	42,958	33,679	41,061	37,173	43,247	41,138	40,172	38,409
Wairarapa	5,743	3,559	5,049	3,822	4,592	4,390	4,472	3,131	5,363	5,528
Marlborough	329,571	233,182	323,290	302,396	313,038	305,467	343,036	269,521	414,649	393,865
Nelson	10,494	6,777	10,028	8,540	9,120	12,370	11,572	7,804	10,867	11,472
North Canterbury	10,962	5,395	12,170	8,240	11,157	8,534	9,861	7,291	9,779	11,090
Central Otago	10,540	8,951	9,177	8,324	11,358	11,868	8,515	10,324	12,575	11,995
Waitaki Valley					170	41	114	23	188	210
Other**	63	159	381	16	3	579	347	147	286	236
Survey total	**429,669**	**312,387**	**420,356**	**382,409**	**404,399**	**398,564**	**441,640**	**358,316**	**514,749**	**484,662**
Industry total*	**445,000**	**326,000**	**436,000**	**396,000**	**419,000**	**413,000**	**457,000**	**370,000**	**532,000**	**501,000**

*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 'survey total' and 'industry total' is data from wine companies who did not respond to the surveys.

**Waikato/Bay of Plenty reported under Other.

Source: New Zealand Winegrowers Annual Vintage Surveys

Statistics

New Zealand wine exports (2014-2023)

		2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
USA	L	48.914	53.858	61.636	72.929	72.701	76.234	82.598	80.252	93.152	107.722
	NZ$	328.049	372.241	460.600	517.258	521.738	557.000	622.150	589.121	694.116	870.505
United Kingdom	L	51.868	59.745	58.936	74.638	74.435	82.728	82.448	80.005	67.518	79.494
	NZ$	318.611	353.931	381.809	389.272	386.740	446.584	464.092	448.864	434.160	537.078
Australia	L	53.709	57.528	52.960	59.672	56.059	56.335	61.852	65.819	57.397	69.504
	NZ$	380.851	362.188	361.677	371.099	366.997	367.722	365.083	379.836	365.881	443.726
Canada	L	7.703	9.583	10.612	11.388	12.776	12.412	12.278	11.036	12.917	12.900
	NZ$	78.941	94.906	107.372	107.434	127.933	130.133	135.961	112.725	141.355	146.144
Germany	L	2.682	2.073	2.667	1.728	1.685	8.413	14.021	13.503	7.030	12.223
	NZ$	14.459	10.018	14.501	10.740	9.061	44.917	66.384	56.854	36.354	71.137
Ireland	L	2.212	2.512	2.888	2.986	3.448	3.020	3.243	3.578	3.570	3.940
	NZ$	16.353	17.472	21.309	21.658	27.183	25.874	27.011	33.421	33.003	38.236
Mainland China	L	1.810	1.858	2.028	2.270	2.520	2.525	2.002	2.088	2.613	2.743
	NZ$	24.803	27.069	27.593	31.758	37.385	39.177	26.698	28.017	36.426	36.335
Netherlands	L	5.022	6.744	6.801	8.203	9.322	4.767	3.707	3.102	2.734	2.834
	NZ$	33.383	41.479	44.480	45.439	50.853	28.655	26.149	24.095	23.485	24.724
Singapore	L	1.572	1.580	1.567	1.306	1.338	1.314	1.148	1.148	1.001	1.233
	NZ$	21.326	20.691	20.570	18.596	19.165	18.884	16.526	16.912	17.129	23.669
Japan	L	1.196	1.193	1.150	1.273	1.225	1.342	1.272	1.143	1.324	1.447
	NZ$	13.908	13.773	13.796	14.565	17.047	15.003	14.873	12.299	14.954	17.906
Hong Kong	L	1.348	1.399	1.283	1.353	1.178	1.067	1.070	1.337	0.968	0.940
	NZ$	16.853	17.680	17.333	18.553	15.671	13.337	14.112	17.868	14.586	15.110
Denmark	L	0.864	1.191	0.942	1.252	1.322	1.362	1.381	1.553	1.790	1.791
	NZ$	6.652	8.042	7.182	8.368	8.594	8.897	8.719	9.769	12.177	13.102
Sweden	L	1.562	1.630	1.843	1.779	1.521	1.631	1.801	1.167	1.015	0.708
	NZ$	13.020	13.163	15.276	14.208	12.903	13.250	15.173	9.853	8.861	7.033
Norway	L	0.334	0.270	0.384	0.320	0.316	0.550	0.605	0.998	0.876	0.561
	NZ$	2.742	2.045	2.511	2.508	2.648	3.569	3.946	5.969	5.792	4.184
Finland	L	0.259	0.310	0.258	0.248	0.261	0.314	0.295	0.315	0.283	0.157
	NZ$	2.283	2.455	2.388	2.004	2.340	2.809	2.477	2.824	2.771	1.471
Others	L	5.834	7.947	7.516	11.618	14.979	16.351	16.740	17.901	11.896	17.630
	NZ$	56.124	67.307	70.938	89.507	101.377	109.304	113.339	121.748	112.323	154.615
Total	**L**	**186.889**	**209.419**	**213.371**	**252.962**	**255.093**	**270.364**	**286.461**	**284.942**	**266.081**	**315.828**
	NZ$	**$1,328.358**	**$1,424.461**	**$1,569.515**	**$1,662.968**	**$1,704.644**	**$1,825.116**	**$1,922.694**	**$1,870.173**	**$1,953.372**	**$2404.975**

All litre and NZ$ figures are in millions

Source: Statistics New Zealand

New Zealand wine exports by market (year end June 2023)

		White 750ml	White other	White total	Red 750ml	Red other	Red total	Sparkling	Fortified	Total
	L	75.270	30.442	105.712	1.537	0.080	1.618	0.381	0.012	**107.722**
USA	NZ$	695.503	143.920	839.423	25.070	1.332	26.402	4.498	0.181	**870.505**
	$/L	$9.24	$4.73	$7.94	$16.31	$16.56	$16.32	$11.82	$15.45	**$8.08**
	L	32.221	44.298	76.518	2.517	0.260	2.777	0.190	0.009	**79.494**
United Kingdom	NZ$	275.679	228.028	503.706	29.227	2.070	31.297	2.007	0.067	**537.078**
	$/L	$8.56	$5.15	$6.58	$11.61	$7.96	$11.27	$10.56	$7.72	**$6.76**
	L	22.057	43.361	65.418	3.162	0.043	3.205	0.881	0.000	**69.504**
Australia	NZ$	166.721	219.387	386.109	47.810	0.587	48.397	9.220	0.002	**443.726**
	$/L	$7.56	$5.06	$5.90	$15.12	$13.64	$15.10	$10.46	$13.19	**$6.38**
	L	11.619	0.245	11.864	1.004	0.000	1.004	0.031	0.001	**12.900**
Canada	NZ$	130.398	1.632	132.031	13.642	0.002	13.644	0.458	0.011	**146.144**
	$/L	$11.22	$6.67	$11.13	$13.59	$8.79	$13.59	$14.89	$8.64	**$11.33**
	L	1.533	10.227	11.760	0.178	0.242	0.420	0.043	0.000	**12.223**
Germany	NZ$	14.068	52.570	66.639	2.506	1.510	4.016	0.482	0.000	**71.137**
	$/L	$9.18	$5.14	$5.67	$14.06	$6.24	$9.55	$11.15	$32.83	**$5.82**
	L	3.730	0.002	3.732	0.191	0.001	0.192	0.015		**3.940**
Ireland	NZ$	35.919	0.022	35.942	2.084	0.011	2.095	0.199		**38.236**
	$/L	$9.63	$9.60	$9.63	$10.90	$12.20	$10.91	$12.90		**$9.71**
	L	2.160	0.012	2.173	0.557	0.010	0.568	0.003	0.000	**2.743**
Mainland China	NZ$	26.241	0.505	26.745	9.405	0.112	9.517	0.069	0.003	**36.335**
	$/L	$12.15	$41.18	$12.31	$16.88	$10.84	$16.77	$24.33	$10.06	**$13.25**
	L	2.183	0.464	2.647	0.159	0.000	0.159	0.027		**2.834**
Netherlands	NZ$	19.453	2.797	22.250	2.249	0.013	2.262	0.211		**24.724**
	$/L	$8.91	$6.03	$8.40	$14.17	$37.19	$14.23	$7.79		**$8.73**
	L	0.925	0.001	0.926	0.250	0.001	0.251	0.052	0.003	**1.233**
Singapore	NZ$	14.776	0.025	14.801	5.768	0.014	5.782	3.044	0.043	**23.669**
	$/L	$15.98	$19.15	$15.98	$23.07	$23.35	$23.07	$58.27	$12.25	**$19.20**
	L	0.869	0.192	1.061	0.344	0.003	0.348	0.038	0.001	**1.447**
Japan	NZ$	9.976	1.159	11.135	6.182	0.059	6.241	0.521	0.009	**17.906**
	$/L	$11.49	$6.03	$10.50	$17.95	$19.01	$17.96	$13.68	$10.08	**$12.37**
	L	0.778	0.016	0.794	0.126	0.002	0.128	0.016	0.001	**0.940**
Hong Kong	NZ$	10.443	0.211	10.655	3.898	0.123	4.020	0.422	0.013	**15.110**
	$/L	$13.42	$13.39	$13.42	$30.84	$61.49	$31.32	$25.82	$11.42	**$16.08**
	L	0.794	0.911	1.705	0.084		0.084	0.002		**1.791**
Denmark	NZ$	6.849	5.056	11.905	1.175		1.175	0.021		**13.102**
	$/L	$8.63	$5.55	$6.98	$14.01		$14.01	$14.10		**$7.32**
	L	0.313	0.143	0.456	0.194	0.000	0.194	0.059		**0.708**
Sweden	NZ$	3.290	0.785	4.075	2.416	0.000	2.416	0.543		**7.033**
	$/L	$10.50	$5.50	$8.94	$12.47	$21.67	$12.47	$9.27		**$9.93**
	L	0.265	0.239	0.504	0.057		0.057			**0.561**
Norway	NZ$	2.153	1.210	3.363	0.821		0.821			**4.184**
	$/L	$8.11	$5.07	$6.67	$14.34		$14.34			**$7.45**
	L	0.111			0.010			0.036		**0.157**
Finland	NZ$	0.953		1	0.131			0.387		**1.471**
	$/L	$8.58		$8.58	$12.73		$12.73	$10.76		**$9.35**
	L	9.306	6.966	16.272	1.132	0.058	1.189	0.166	0.003	**17.630**
Others	NZ$	98.588	35.373	133.961	16.982	0.636	17.618	2.961	0.074	**154.615**
	$/L	$10.59	$5.08	$8.23	$15.01	$11.06	$14.82	$17.82	$26.11	**$8.77**
	L	**164.135**	**137.518**	**301.653**	**11.503**	**0.701**	**12.204**	**1.940**	**0.031**	**315.828**
Total	**NZ$**	**1,511.011**	**692.681**	**2,203.692**	**169.367**	**6.468**	**175.835**	**25.044**	**0.404**	**2,404.975**
	$/L	**$9.21**	**$5.04**	**$7.31**	**$14.72**	**$9.23**	**$14.41**	**$12.91**	**$13.22**	**$7.61**

All litre and NZ$ figures are in millions

Source: Statistics New Zealand

Statistics

New Zealand wine exports by variety (2014-2023)

Variety	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Sauvignon Blanc	160.58	177.776	181.944	217.89	220.065	231.194	249.445	242.876	228.479	279.171
Pinot Gris	4.688	4.479	4.713	7.151	7.74	8.678	9.207	10.671	8.953	10.310
Pinot Noir	10.705	10.886	12.171	12.51	13.171	12.331	10.282	10.868	10.469	9.165
Rosé	0.712	0.835	0.942	2.389	3.656	5.195	5.592	7.996	5.827	4.254
Chardonnay	4.627	5.277	6.063	6.172	4.766	5.088	4.649	4.914	4.883	4.148
Sparkling	1.7	1.441	1.412	1.088	1.167	1.15	1.366	3.272	2.216	2.716
Merlot	1.765	1.711	1.906	2.25	2.06	2.769	1.456	1.641	1.744	1.581
Riesling	0.996	0.113	0.15	1.099	0.962	1.047	1.184	1.089	0.898	0.933
Generic White	0.043	0.384	0.38	0.085	0.12	0.126	0.077	0.533	0.639	0.395
Cabernet or Merlot Blend	1.03	0.754	0.836	0.972	0.798	0.81	0.436	0.453	0.378	0.283
Other White Varietals	0.127	0.282	0.341	0.453	0.42	0.235	0.254	0.217	0.278	0.227
Syrah	0.242	0.954	1.065	0.283	0.375	0.346	0.273	0.236	0.355	0.201
Gewürztraminer	0.212	0.017	0.026	0.182	0.15	0.148	0.135	0.119	0.085	0.087
Generic Red	0.002	0.17	0.087	0.126	0.013	0.008	0.042	0.032	0.061	0.065
Other Red Varietals	0.068	0.041	0.048	0.128	0.064	0.085	0.047	0.074	0.066	0.053
Cabernet Sauvignon	0.006	0.012	0.013	0.011	0.023	0.011	0.019	0.020	0.047	0.029
Sauvignon Blend	0.034	0.014	0.013	0.135	0.102	0.018	0.009	0.013	0.027	0.026
Sparkling Sauvignon	0.107	0.175	0.183	0.059	0.101	0.042	0.056	0.069	0.052	0.022
Chenin Blanc	0.017	0.041	0.028	0.008	0.009	0.011	0.01	0.016	0.019	0.021
Chardonnay Blend	0.047	0.005	0.132	0.007	0.008	0.01	0.013	0.028	0.023	0.019
Sweet Wines	0.037	0.085	0.134	0.051	0.032	0.024	0.021	0.019	0.018	0.012
Fortified	0.004	0.002	0.011	0.001		0.002			0.001	
Semillon	0.008	0.009		0.051						
Total*	**187.757**	**205.46**	**212.594**	**253.099**	**255.802**	**269.329**	**284.574**	**285.156**	**265.517**	**313.719**

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

Note: All figures are in millions of litres

Source: Wine Export Certification Service

Wine imports into New Zealand (2014-2023)

By country of origin	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Australia	31.958	25.668	28.715	28.517	31.527	32.118	29.795	27.427	33.566	31.609
France	2.153	2.344	2.869	2.807	2.762	3.069	2.807	3.475	4.154	3.536
Italy	0.940	1.023	1.308	1.381	1.786	1.870	2.362	2.539	3.148	2.666
South Africa	1.732	1.373	1.086	1.492	1.370	1.406	0.615	2.001	3.122	2.437
Chile	2.457	1.905	1.842	2	1.606	1.522	1.943	2.166	0.825	1.134
Argentina	0.161	0.229	0.212	0.223	0.265	0.917	2.084	1.001	0.353	0.218
Spain	0.518	0.641	0.578	0.716	0.557	0.654	0.955	0.692	0.807	0.554
Others	1.106	1.307	0.603	1.958	1.017	0.911	1.057	1.757	1.195	1.114
Total	**40.724**	**34.490**	**37.212**	**39.935**	**40.881**	**42.466**	**41.618**	**41.059**	**47.170**	**43.268**

By product type	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
White	17.280	11.217	14.088	18.206	21.525	21.237	20.603	18.935	21.255	21.339
Red	20.542	19.830	19.070	17.579	15.035	16.281	16.267	16.686	18.815	15.553
Sparkling	1.849	2.268	2.632	2.651	2.904	3.317	3.415	3.839	5.188	4.744
Champagne	0.896	1.049	1.364	1.397	1.371	1.567	1.288	1.544	1.858	1.580
Fortified	0.158	0.126	0.036	0.076	0.044	0.064	0.045	0.054	0.054	0.052
Total	**40.724**	**34.490**	**37.190**	**39.909**	**40.879**	**42.466**	**41.618**	**41.059**	**47.170**	**43.268**

Country of origin		White	Red	Sparkling	Champagne	Fortified	Total
Australia	NZ$	40.542	75.103	17.732		1.152	134.529
	L	17.162	11.679	2.748		0.019	31.609
France	NZ$	6.295	19.456	1.261	56.720	0.099	83.831
	L	0.467	1.348	0.140	1.580	0.001	3.536
Italy	NZ$	3.583	7.976	13.346		0.069	24.975
	L	0.334	0.848	1.482		0.001	2.666
Spain	NZ$	0.542	3.165	0.524		0.364	4.595
	L	0.061	0.421	0.068		0.004	0.554
South Africa	NZ$	3.068	1.234	0.065		0.005	4.373
	L	1.935	0.495	0.007		0.000	2.437
Chile	NZ$	1.736	1.409	0.005		0.000	3.150
	L	0.887	0.247	0.000		0.000	1.134
Argentina	NZ$	0.113	1.348	0.000		0.000	1.462
	L	0.032	0.186	0.000		0.000	0.218
Others	NZ$	4.676	3.528	3.284		2.327	13.815
	L	0.461	0.327	0.299		0.027	1.114
Total	**NZ$**	**60.556**	**113.220**	**36.217**	**56.720**	**4.017**	**270.729**
	L	**21.339**	**15.553**	**4.744**	**1.580**	**0.052**	**43.268**

All litre and NZ$ figures are in millions

Source: Wine Export Certification Service

Directory

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New Zealand Winegrowers

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(Deputy Chair)
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Duncan McFarlane
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For a full list of the Roll of Fellows for New Zealand Winegrowers and Wine Institute of New Zealand, and the Roll of Honorary Life Members, please visit **nzwine.com/our-people**

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Manaaki Whenua

Manaaki Tangata

Haere Whakamua

If we take care
of the earth,

and take care
of the people,

we will take care
of the future.

New Zealand Wine
Altogether Unique.