New Zealand Winegrowers Inc.

Annual Report

2026

Altogether Unique.

TE KANO, CENTRAL OTAGO. PHOTO: RICHARD BRIGGS

New Zealand Winegrowers Inc. is the national organisation of and for the members of the New Zealand grape and wine industry.

Vision

Consumers everywhere are loving and buying New Zealand wine.

Mission

Elevate and sustain the New Zealand wine industry by empowering our members.

Purpose

Creating enduring member value by enhancing the reputation of New Zealand wine and the sustainability of our industry.

New Zealand Winegrowers Inc.
Annual Report
2026

COVER PHOTO: NICOLE SCHOFIELD AND JEN PARR WITH ZIGGY AND THIEFY,
VALLI VINEYARDS, WAITAKI VALLEY. PHOTO: RICHARD BRIGGS

Chair's Report

In what has been a challenging year across the global wine industry, New Zealand wine has shown remarkable resilience, continuing decades of consumer-driven international growth, backed by our strong reputation for highly distinctive, premium, sustainably produced wines.

GREYSTONE, NORTH CANTERBURY. PHOTO: RICHARD BRIGGS

That reputation has enabled New Zealand wine to command a premium position in markets around the world and to contribute significant value to New Zealand's regional communities and economy.

While our long-term fundamentals remain strong, many of our members have been operating in an exceptionally difficult environment. Growers and wineries across the country have faced a combination of financial, operational, and personal pressures, requiring difficult decisions and significant perseverance.

The industry is working through a period of adjustment shaped by global economic uncertainty, evolving consumer behaviour, increasing regulatory complexity and costs, and the impacts of recent larger vintages. With exports accounting for around 90% of New Zealand wine sales, our sector remains closely linked to international market conditions. These factors, combined with an imbalance between supply and demand, have contributed to higher inventory levels, reduced demand for grapes in vintage 2026, and pricing pressure across parts of the industry.

We have successfully navigated challenging times before, and while the situation won't be resolved in the short term, we remain focused on supporting our members. We will continue to strengthen the long-term opportunities for the industry alongside our members, by investing in activity in our key export markets to enrich New Zealand wine's premium reputation.

Consumers around the world continue to discover, love, and buy New Zealand wines; the challenge ahead is to remain relevant and sought after by the upcoming generation of wine drinkers.

Market performance

While performance varies by market, channel, and price point, New Zealand wine continues to perform strongly relative to the broader category. In many key markets—including the United States (US), the United Kingdom (UK), Canada, Australia, and China—New Zealand wine continues to record growth in value, and volume, or both. The standout growth of South Korea has been of notable interest and has been added to the list of key markets that New Zealand Winegrowers (NZW) shapes activity around.

This performance reflects the strength of our premium positioning, the consistency of our product quality, and our alignment with consumer preferences for lighter, fresher wine styles. It also reflects the investment made by growers and wineries over many years to build brands and relationships in market and leverage New Zealand's reputation.

Innovation in our industry is also worthy of comment. Following the significant industry investment in the Lighter Wines project between 2017 and 2021, it is heartening to see the innovation it has spurred and the strong market leadership that has resulted. This is particularly evident in the US market, where New Zealand's share of the no- and lower-alcohol wine category significantly exceeds its national share of the overall wine market. As the categories of no- and lower-alcohol wine grow globally in response to moderation and abstinence occasions, we welcome more markets updating their regulations to better accommodate consumer demand for these products.

With exports accounting for around 90% of New Zealand wine sales, our sector remains closely linked to international market conditions.

As we look forward, supporting our industry to make informed decisions towards the future through the provision of quality intel and insights is a prime objective. It is important for all of us as an industry to stay closely aligned to what consumers of premium wine want, and are willing to pay for, while continuing to adapt where we can—in vineyards, wineries, packaging, and markets.

Vintage and supply

The balance between supply and demand remains the central issue facing the industry. Following recent larger vintages, many within the sector are actively resetting their supply base. This is being reflected across the country, with the consequences of the reset resulting in lower grape prices and a reduction in contract growing in 2026. Subsequently, decisions have been made by some growers and wineries to mothball or remove vineyards.

Vintage 2026 had a lower production of 440,000 tonnes of grapes harvested this year, down 15% on the 2025 vintage and helping to ease supply pressures. However, the process of rebalancing will take time and will depend on export performance, consumer demand, and the extent of supply adjustments undertaken by the industry.

Looking ahead, continued investment in further strengthening SWNZ standards and in the communication of our progress will be essential to maintaining New Zealand's position as one of the world's leading wine industries in this space.

This period reinforces the importance of maintaining a clear focus on both value and volume. The long-term success of New Zealand wine has been built on premiumisation, and that must remain central as the sector navigates current challenges and positions itself for future growth.

Sustainability and our global reputation

Sustainability continues to be a cornerstone of the New Zealand wine story and a critical driver of long-term success. Over more than three decades, the industry has developed a strong international reputation for producing distinctive, premium wines underpinned by a deep commitment to environmental and social responsibility.

That reputation is increasingly important in global markets, where sustainability is no longer simply a point of differentiation but a requirement for market access. Retailers, regulators and consumers are demanding credible, transparent and verifiable evidence of sustainability practices, and New Zealand is well positioned to meet those expectations.

The Sustainable Winegrowing New Zealand (SWNZ) programme remains central to this effort. As a comprehensive, independently audited certification system, SWNZ provides credible evidence of sustainability performance across vineyards and wineries, supporting market expectations and helping to protect our social licence to operate.

Over the past year, NZW has focused on strengthening how sustainability is communicated, ensuring that our story is consistent, compelling and aligned with our broader brand platform. The 'Places and People' framework brings this to life, highlighting the connection between our environment, our communities, and the wines we produce. There has also been a shift in what sustainability means for members. It is no longer a 'nice to have'. Instead, it is becoming an imperative for market access. Through practical tools, guidance, and communications, NZW is supporting members to better leverage sustainability as a competitive advantage.

Looking ahead, continued investment in further strengthening SWNZ standards and in the communication of our progress will be essential to maintaining New Zealand's position as one of the world's leading wine industries in this space.

Building the New Zealand Wine brand

Building and protecting the New Zealand Wine brand remains a core priority. Over many years, consistent investment in brand activity has helped establish a strong, premium position in global markets, supported by a clear and distinctive narrative about who we are and what we stand for.

The Pinot Noir New Zealand 2025 event at the beginning of last year demonstrated the value of bringing international media, trade, and influencers to New Zealand, providing them with an authentic and immersive experience of our wines, regions, and people. This success has provided confidence to continue to invest in bringing influential guests to New Zealand, and we have a strong list of confirmations ahead of Sauvignon Blanc New Zealand 2027 next February. This event provides an important opportunity for members to participate, connect with influential international guests and industry colleagues, share knowledge, and help shape the next chapter of New Zealand's flagship wine variety. This event will create a moment in time where the global wine community turns its attention to New Zealand, and where influential commentators share their insights and experiences with audiences around the world.

These events are complemented by an ongoing programme of in-market activity, including trade engagement, education, public relations, and partnerships. Together, these efforts ensure New Zealand wine maintains visibility and relevance in an increasingly competitive global environment.

Advocacy and market access

Ensuring competitive access to global markets remains a critical priority for NZW, particularly given the ongoing volatility in the global trade environment. The Advocacy team works closely with government agencies and international partners to support the interests of members and to navigate an evolving and often complex trade environment.

A key development over the past year has been progress on the New Zealand–India Free Trade Agreement. The agreement has been signed and is expected to enter into force later this year after it has been ratified by both countries. It includes provisions for gradual tariff reductions on New Zealand wine, improving market access into one of the world's largest and fastest-growing consumer markets.

This agreement represents a significant opportunity for the industry, both in terms of expanding market reach and enhancing long-term competitiveness. It also highlights the importance of sustained advocacy and strong relationships with government and trade partners.

Maintaining and improving market access will remain a key focus for NZW as the industry navigates both short-term challenges and long-term growth opportunities.

Strategic focus and direction

A core focus for the Board over the past year has been the development of a refreshed strategy for NZW. This work has been undertaken in recognition of the increasingly complex and challenging environment facing the industry,

VINEXPO HONG KONG 2026

A key development over the past year has been progress on the New Zealand–India Free Trade Agreement.

and the importance of ensuring that NZW has a clear, well-defined role in delivering value to its members.

The strategy has been developed by Board members, working closely with the NZW Management team. The starting point for this work was to clearly articulate NZW's mandate and role within the industry, and to define how the organisation can add the most value to members in a practical and measurable way.

This has been particularly important given the diversity of the industry and the range of expectations across different member groups. A consistent theme throughout the strategy work was the need to focus on delivering collective benefit to the industry as a whole, while ensuring that the value delivered to members is clearly understood and effectively communicated.

The refreshed strategy provides a clear framework for NZW activity, spanning core pillars of 'support and inform members', 'enable members', 'enhance and sustain New Zealand wine's reputation', and 'governance and organisational capability'. Across these areas, it sets out specific priorities and outcomes designed to strengthen the industry's performance, reputation, and resilience over time.

While the immediate environment remains challenging, the long-term fundamentals of the New Zealand wine industry remain strong.

This work represents a deliberate step forward in how the Board approaches its role. There has been an increased emphasis on strategic thinking within Board discussions, ensuring that time is set aside not only for governance and oversight, but also for longer-term direction setting. For members, this will mean a stronger focus on timely industry information, effective advocacy, market development, biosecurity, sustainability, and research activity that delivers measurable collective benefit.

Building for the future—governnance changes

A significant focus for the Board over the past two years has been the comprehensive review of NZW's governance structure and levy collection processes. This work was initiated following feedback from members during the 2021 levy vote and reflects a commitment to ensuring the organisation remains fit for purpose.

The review has been extensive and valuable, involving Board members, independent participants, and consultation with members across the country. This has included regional meetings and feedback received by phone, email, and written submissions.

The resulting proposals were designed to ensure NZW's governance framework remains representative, equitable, and effective for all members. Key changes include moving to a smaller, more skills-based Board, reducing industry-elected directors from 10 to six, increasing independent directors from two to three, while still ensuring appropriate representation of both grape and wine levy payers.

The proposals also included up to two non-voting associate director roles to support future industry leadership development, and a move to market-based director remuneration to encourage broad participation and reflect the responsibilities of governance.

In addition, effective from 1 July 2026, the composition of the Bragato Research Institute (BRI) Board was changed to mirror that of the NZW Board. While the Boards are made up of the same individuals, they continue to operate as separate entities. This decision was supported by the directors of the BRI Board. BRI will continue to be led by CEO Dr Juliet Ansell as a separate organisation delivering research and innovation for the wine industry, with no effect on BRI's day-to-day operations or research programmes. The transition will strengthen both organisations' ability to maximise value for members in the research space and provide alignment and opportunities across governance of both organisations.

Supporting members

Throughout the year, supporting members has remained central to all NZW activity. This includes delivering market insights and data, advocating on trade and regulatory issues, supporting sustainability and biosecurity programmes, and maintaining partnerships that create value for members. This year marked our first involvement in a biosecurity response under the Government Industry Agreement to eradicate the yellow-legged hornet (Vespa velutina) that was detected in Auckland.

The provision of clear, timely information to support members' own decision-making is of paramount importance. We are grateful to those who contribute data to initiatives such as the Vintage Survey, the Biosecurity Vineyard Register, and other industry reporting. That information is essential in building an accurate picture of the sector and helping all participants navigate current conditions.

The strong engagement with webinars, along with our new State of the Industry updates, the annual

Grape Days, and other member communications, demonstrates the importance of clear, practical information during uncertain times.

We also want to acknowledge the willingness of members to share information, ask difficult questions, and engage constructively through this period. That openness strengthens the quality of our industry-wide understanding and helps NZW advocate, communicate, and plan with greater confidence on behalf of all members.

Leadership transition

This year marks an important leadership transition for NZW with the retirement of Philip Gregan after more than four decades of service. Philip's contribution to the industry has been immense. His leadership has helped guide New Zealand wine through periods of extraordinary growth and change, and he leaves a lasting legacy of innovation, global recognition, and commitment to members.

On behalf of the Board, we sincerely thank Philip for his dedication and service. We are also pleased to welcome Anishka Jelicich as Chief Executive Officer and look forward to her leadership as NZW continues to evolve to meet the needs of members.

2026 Fellows

It was also a privilege during the year for the Board to confirm five new New Zealand Winegrowers Fellows, recognising individuals whose leadership, expertise, and commitment have made a lasting contribution to our industry. Congratulations to Kevin Judd, Lynnette Hudson, Rex Sunde, Philip Gregan, and Sir Sam Neill, each of whom has helped shape the success and reputation of New Zealand wine in their own unique way. Their contributions span viticulture, winemaking, sustainability, education, governance, advocacy, and the promotion of New Zealand wine both here and internationally. It was particularly fitting that Philip Gregan was recognised as a Fellow following his retirement from NZW after 43 years of service, including 35 years as Chief Executive Officer.

The announcement was particularly poignant in the case of Sam Neill. As an internationally acclaimed actor and passionate advocate for New Zealand wine, Sam generously used his profile and distinctive voice over many years to champion the people, places, and stories behind our industry. We were deeply saddened by his passing, but grateful that he was aware of, and delighted by, this recognition before his death. His contribution leaves an enduring legacy and he will be greatly missed.

Looking ahead

While the immediate environment remains challenging, the long-term fundamentals of the New Zealand wine industry remain strong. The sector's reputation for quality, sustainability, innovation, and authenticity provides a solid foundation for future success.

New Zealand wine has come through difficult periods before. While the path ahead may be challenging in the short term, there remains a strong foundation for the future. NZW will continue to work collectively with the industry to support members through this period of adjustment, providing leadership, advocacy, data, and promotional activity to ensure the industry remains well positioned to succeed in a competitive and evolving global market.

We would also like to thank our fellow directors, the teams at NZW and BRI, our regional organisations, committee members, and the many industry participants who contribute their time and expertise on behalf of the wider sector.

Fabian Yukich
(Chair)

Emma Taylor
(Deputy Chair)

Environment

The NZW Environment team continues to champion the wine industry's sustainability goals across water, waste, plant protection, soil, people, and climate change.

CLIMATE CHANGE

WASTE

PEOPLE

PLANT PROTECTION

WATER

SOIL

GREYSTONE, NORTH CANTERBURY. PHOTO: RICHARD BRIGGS

Over the past year, the team's work has focused on environmental advocacy, strengthening Sustainable Winegrowing New Zealand (SWNZ), promoting climate action, and building biosecurity preparedness.

Resource management reform

This legislation has the potential to impact every member. In March, NZW presented to the Environment Select Committee on the Government's Planning Bill and Natural Environment Bill that, once passed, will replace the Resource Management Act. Our submission highlighted support for the general framework and intent of the Bills—to move to a system that is less complex, more efficient and cost effective, and provides more certainty for users. The NZW submission also raised key issues of concern, such as our opposition to market-based allocation of freshwater resources and the need to register permitted activities such as agrichemical spraying with regional councils. We expect the government to implement the new legislation prior to the general election.

Freshwater Farm Plans

In March it was confirmed that the threshold for exemption from Freshwater Farm Planning requirements on solely viticultural properties was raised from five to 50 hectares. This amendment shows that the Government responded to our advocacy, which used data derived from SWNZ to illustrate the relatively low impact of viticulture on freshwater ecosystems. We estimate this amendment will save the industry millions of dollars in compliance costs in coming years as it significantly reduces the number of members who will be subject to these requirements. During this time, we also partnered with Government to produce high-quality guidance for members on how to mitigate the potential impact of viticulture on freshwater ecosystems. This work will help members to ensure compliance with the new regulations when they are introduced and reinforce our commitment to be a world leader in efficient water use and the protection of water quality.

Climate change

Throughout 2026, NZW and thinkstep-anz worked together to update the Roadmap to Net Zero 2050 to clarify the boundary of measurement and correct errors from the original version released in August 2024. The total industry footprint is now estimated at 438,000 tCO_2e, compared with 305,000 tCO_2e when the Roadmap was first released. The significant increase in Scope 3 emissions comes from inclusion of the emissions associated with bottling unpackaged wine offshore. This work means that we are strengthening the credibility and transparency of our emissions reporting.

Sustainable Winegrowing New Zealand

The SWNZ programme continues to showcase our industry's commitment to sustainable wine production. The year 2025 marked three decades of dedication to sustainability that has strengthened the reputation of New Zealand wine globally.

A key objective of the SWNZ programme is to enable market access for New Zealand wine. Many market gatekeepers, including government bodies and retailers, are increasingly scrutinising sustainability claims, including certification programmes like SWNZ. One area of recent focus internationally is labour practices and social responsibility.

This year, a review was conducted on the SWNZ People pillar. This has resulted in new requirements for all SWNZ members, which will strengthen this area of the programme and ensure SWNZ certification meets overseas market expectations. Resource materials have been produced to ensure members understand the new requirements and how to implement them effectively within their business, ahead of the new requirements being added to the 2026/27 SWNZ questionnaires.

The SWNZ Standard document was released in May, and provides detailed information about programme requirements across all six focus areas that SWNZ members must meet for certification. This document improves SWNZ's transparency and robustness for members and market gatekeepers.

The SWNZ programme continues to showcase our industry's commitment to sustainable wine production.

MAN O' WAR VINEYARD, WAIHEKE ISLAND . PHOTO: RICHARD BRIGGS

Annual submissions and regular independent audits are fundamental to the SWNZ programme. Throughout the next 12 months, we will release a range of refreshed educational resources to assist members with completing their SWNZ submissions as efficiently as possible.

Biosecurity

This year saw NZW join our first-ever biosecurity response under the Government Industry Agreement (GIA), as a partner to the yellow-legged hornet (Vespa velutina) response. While hornets are known to feed on grapes, the greatest risk they pose is to apiculture, with bees being their preferred prey. The NZW Board therefore capped the wine industry's contribution to the response at $25,000, reflecting the lower priority of the hornet to the wine sector. The response appears to have been successful, with no further hornets detected since early April.

Further progress has been made on a Response Operational Agreement for Xylella fastidiosa (the causal agent of Pierce's disease in grapevines, a high-risk threat), with the industry partners' position largely developed. Completion of this Operational Agreement will mean there is certainty as to which sectors are involved, and what their financial contributions will be should a response to Xylella occur in the future, enabling a response to be stood up in a timely and efficient manner.

Biosecurity requirements are now mandatory for SWNZ certification. Feedback from members and auditors will be reviewed to ensure the requirements have been successfully implemented. For non-SWNZ members, following biosecurity best practice is highly recommended, and resources are available on nzwine.com.

NZW and BRI have worked together to develop a biosecurity risk analysis tool, which will be used to assist with reviewing our 'Most Unwanted' pest list on a regular basis as the spread and population dynamics of grapevine pests change internationally, and the risk to New Zealand subsequently increases or decreases.

NZW also continues to engage with government reform across biosecurity, ensuring positive outcomes for NZW members. This will be an important part of the Biosecurity team's work for the coming year.

Organic Winegrowers New Zealand

Organic Winegrowers New Zealand (OWNZ), the association for growers practising or interested in organic production, works to promote and support organic grape and wine production with the support of NZW. OWNZ has 194 member companies.

RIMAPERE, MARLBOROUGH. PHOTO: JIM TANNOCK

Organic Wine sector by the numbers

In 2025, New Zealand had 204 certified organic vineyards—around 10% of all vineyards nationally. In total, certified organic vineyards cover 1,963 hectares—4.5% of New Zealand's planted vineyard area. There are 108 wineries that hold organic certification, and 14.6% of New Zealand wineries have at least one organic label*.

Central Otago continues to lead the country in organic adoption, with 27% of its vineyard area (589 hectares) managed organically. More than 15% of New Zealand's Pinot Noir is organically grown, while Sauvignon Blanc remains at 2%.

Central Otago continues to lead the country in organic adoption.

From Nick Paulin, Chair, OWNZ

“A new generation of consumers is emerging—people who are increasingly environmentally conscious, who demand transparency and integrity, and who are seeking out organic wines that tell a true story: wines that come from producers who care for the environment in which they grow their grapes by not using synthetic products and embracing techniques that work with nature and not against it.

"The growth in consumer interest provides optimism, however, much like the wider industry, our members are facing many challenges—market headwinds, regulation changes, and weather events. In the past year, OWNZ, in combination with NZW, were heavily involved in advocacy on the Government's proposed Gene Technology Bill. While the legislation itself remains stalled, OWNZ is committed to continued advocacy that will protect the whole wine industry from risks associated with the introduction of genetically modified organisms into the environment.

OWNZ remains engaged with Government to progress the Organic Products and Production Act. While progress has been slow, we expect an update as to what the standards will look like early in 2027."

OWNZ events

The annual Organic Wine Week in September featured tastings, winemaker dinners, and promotions across New Zealand. Down to Earth, OWNZ's flagship organic trade and consumer tasting event, returned to Auckland for its third consecutive year and made its Sydney debut in 2025. These events raised considerable interest in New Zealand's organic wine producers.

After five successful conferences in Marlborough, OWNZ is excited to bring 'Undercurrent' to Central Otago from 1–3 June 2027. Preparing for this event will be a major focus in the coming year.

**BioGro NZ, October 2025*

Brand

SUSIE & PETER'S NEW ZEALAND WINES OF THE YEAR, UK

The NZW Brand team has delivered a focused programme of international activity across established and emerging markets reinforcing New Zealand wine's premium reputation globally.

New Zealand Wine on the world stage

On the back of strong export performance, the growing importance of Asia has been a defining theme this year, supporting a strategic shift towards increased investment in emerging markets. As demand for premium wine continues to evolve across the region, the New Zealand wine industry is well positioned to build awareness, deepen trade relationships, and capture long-term growth opportunities. Growth in markets such as China and South Korea, and strong prospects in the likes of India, form the basis for increased investment in the wider Asia region. Annual export data to the end of June reveal exports to China increased 72% and to South Korea by 20% over the prior 12 months.

A significant milestone was NZW's participation in Vinexposium's Wine Paris exhibition for the first time, after moving from longstanding participation in ProWein held in Düsseldorf, Germany. This strategic move reflected changing dynamics in the global wine event landscape and was well received by members, with plans already underway to expand our presence in 2027.

The Asia region is also a strong area of focus for Vinexposium, and NZW hosted a pavilion at Vinexpo Asia. Doubling in size compared with previous years, this reflects increased member demand. Attracting more than 14,000 visitors across 76 markets, the exhibition reinforced Hong Kong's position as a gateway into Asia and provided opportunities for New Zealand wineries to build relationships and explore new business opportunities.

Collaboration continues to be an essential element to how NZW achieves value for members, enabling greater scale and efficiency in market. In the UK and Europe, NZW strengthened its partnership with Wine Australia through European roadshows, our second joint UK Annual Trade Tasting, and expanding regional engagement with events in cities such as Birmingham. These initiatives enabled both organisations to reach wider trade audiences, thereby maximising the value and impact of their shared investment.

Activity in the US focused on raising the profile of New Zealand wine through strategic PR investment and targeted on-trade engagement via NZW's proprietary Sommit platform, with events held in Los Angeles and New York. Led by past Sommit participants, these peer-to-peer knowledge-sharing events brought together leading trade and media representatives to explore the New Zealand wine story, reinforcing its premium positioning.

Momentum in Canada continued to build, with strong double-digit export growth supported by NZW's market-based team. Through the delivery of market activities and

NEW RELEASE TASTING, LONDON

> *"Loved the vibe, just felt more alive than ProWein! Loved the stand, good contacts made, good camaraderie on the stand as usual, stand staff were brilliant."*
>
> – Participating Winery, NZW's Wine Paris Pavilion

winery support, alongside close engagement with provincial liquor boards, the team helped increase listing opportunities for New Zealand wine across the market.

In Australia, activity focused on strengthening the profile of New Zealand wine through PR, media engagement, trade partnerships, and market activation. Working closely with our Australian PR agency, campaigns such as Pour Yourself a Glass of New Zealand celebrated the quality, diversity, and contemporary appeal of New Zealand wine while generating engagement with both trade and consumer audiences. Alongside this activity, strong relationships with key trade partners, including Sommeliers Australia, helped increase visibility for New Zealand wine amongst influential gatekeepers of the premium on-premise channel.

Strong partnerships continue to amplify the impact of our activity. Collaboration with NZTE supported market development in South Korea and Japan, and enhanced delivery at major trade expos such as Vinexpo Hong Kong. Supporting the development of Tourism New Zealand's Food and Beverage value proposition has also ensured wine remains part of broader New Zealand destination storytelling across priority markets.

Driving member engagement and value

Providing tangible value to members remains at the core of Brand Team activity, with a continued focus on market information and meaningful engagement opportunities to connect and learn from each other as an industry.

The Intel & Insights programme continues to provide members with timely analysis of market data and consumer insights to support decision-making among members' businesses. During the year, Intel and Insights resources attracted 262 views/downloads, while six webinars were delivered to more than 892 attendees. Together, these initiatives provide practical insights to help members navigate a rapidly evolving global wine landscape.

The 2025 Wine Business Forum, 'Embracing Change and Sustaining Growth', saw a 25% increase in attendance on the prior year, reflecting its continued importance as a key annual event for member engagement and industry learning. The event was opened by Hon Todd McClay, Minister of Agriculture, Forestry and Trade, who shared insights on international trade, market access, and New Zealand's position in the global marketplace. Highlights also included presentations from Lulie Halstead, founder of Wine Intelligence, on evolving consumer trends and growth opportunities, and Rob McMillan, Founder of the Silicon Valley Bank Wine Division, who explored the challenges and opportunities facing the global wine industry. Discussions throughout the Forum covered changing consumer behaviour, AI and data, and strategies to help New Zealand wineries compete in an increasingly dynamic global market. As SWNZ celebrated 30 years, the programme highlighted the strength of New Zealand wine's sustainability credentials, an important competitive advantage in international markets and a cornerstone of the sector's global reputation.

With strong foundations in place, attention is now turning to Sauvignon Blanc New Zealand 2027, where we look forward to welcoming influential trade, media, content creators, and industry guests to New Zealand and turn their storytelling expertise to strengthen the premium reputation of New Zealand Wine in key export markets.

BRAND ACTIVITY

The Numbers

Global PR Programme

Strengthening the premium reputation of New Zealand Wine.

The NZW Global PR Programme has continued to expand the reach and relevance of New Zealand Wine internationally, enhancing talkability and ensuring the category remains part of the global conversation across both trade and consumer media.

MEDIA ARTICLES	REACH	PR VALUE
129	177.1 MILLION	$14.2 MILLION

Trade Activation

'Influencing the influencer'

NZW's levy-funded trade activations are category development initiatives designed to influence decision-makers across on-premise, off-premise, importer, and distributor by showcasing the unique and profitable offering that New Zealand wine presents.

25 NUMBER OF TRADE ACTIVITIES	302 INDIVIDUAL WINES POURED REPRESENTING 116 INDIVIDUAL MEMBERS
2,493 TRADE REACHED	9,762 TOTAL VIEWS ACROSS THE NZW TRADE HUB

Brand Events

From industry networking to global brand promotion, the Brand Team delivers a diverse programme of events that connect and showcase our members' wines to the world. Held in priority markets, activities include trade and media tastings, retail promotions, and international exhibitions, providing valuable platforms for individual winery promotion while collectively championing the New Zealand wine category and reinforcing its premium reputation on the global stage.

36

NUMBER OF USER-PAYS EVENTS

Intel & Insights

Provision of relevant information to support member 'go to market' strategies.

UNIQUE VIEWS ACROSS NZW INTEL & INSIGHTS DATA

845

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. This is more important than ever in the current challenging operating environment.

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

International trade

The past year has shown continued global volatility in global trade. As one of the world's largest exporters of wine, this volatility has an outsized impact on NZW's members. Exports to the US have faced varying tariffs in the past year, —12.5% at the time of writing (in addition to the tariffs that applied prior to the current Administration). NZW continues to monitor the situation closely, given the US is the largest export market for New Zealand wine.

While wine exports to the Middle East are much smaller than they are to the United States, the outbreak of the Iran conflict has also led to increased costs of production and wider impacts on global supply chains.

We welcomed the signing of a free trade agreement with India in April, and look forward to the agreement being finalised and signed as soon as possible. While tariffs will reduce over several years, we welcome reductions from the 150% tariff rates that have significantly impacted this major market until now. In addition, the inclusion of a Most Favoured Nation clause provides longer-term certainty for exporters. While current wine exports to India are very modest (at just under $300,000 in 2025), improved market access and changing consumer trends are expected to enhance business opportunities for our members in this emerging wine market.

The Advocacy team continues to support members with regulatory queries in different markets, including on production of no- and low-alcohol wines. However, making and labelling these products for some markets remains a challenge. In many countries, the regulatory frameworks for wine have not yet caught up with the growth of this category. In contrast, New Zealand's regulations do not define a wine by how much alcohol the end product contains, which offers our producers more flexibility domestically than in other markets.

Another challenge we encounter in some markets, particularly some markets in Asia, is that regulatory frameworks are not specifically tailored to winemaking, requiring wine to comply with general food requirements. This can create gaps where certain winemaking practices are not permitted in a given market, despite being widely accepted elsewhere.

This past year, the European Union (EU) saw progression of two significant sustainability reforms. Firstly, the ongoing implementation of widespread packaging reforms setting new requirements on all product packaging in the EU. Secondly, tightening the EU's consumer protection framework to prevent greenwashing claims and set standards for product certification. Both reforms indicate clear market expectations that strong environmental performance must now be robustly demonstrated as a condition of market access. The team developed member-facing guidance and support to help EU wine exporters navigate this period of change, and worked closely with international counterparts to clarify and reduce the complexity of new requirements.

The Advocacy team continues to engage in key international organisations for the sector, ensuring that our views are represented and building partnerships to support the global trade in New Zealand wine. This includes meetings of OIV (International Organisation of Vine and Wine), World Wine Trade Group, and FIVS (International Wine Federation).

SOLJANS. PHOTO: CONNOR HACKETT

Later in 2026, the OIV Congress will be hosted in Ningxia, China. This will provide opportunities to build partnerships in a key growth market for New Zealand wine.

The domestic regulatory framework

We continue to be a trusted voice to government through participation in working groups like MPI's Cost Recovery, providing regular briefings to Ministers and appearing before Select Committees in support of NZW's written submissions.

Excise increases: The Government announced an excise increase from 1 July 2026 in line with CPI. Excise on a typical 750 mL bottle of wine has increased from $2.33 to $2.92 a bottle in five years, an increase of 24%. Cost pressures are one of the most significant issues facing winegrowers, and if a business cannot pass on these increases, excise simply becomes a direct cost on producers rather than consumers. We explained to the Government that the current excise rate for table wine in 2025 ($3.78 per litre) equates to approximately $2,700 per tonne of grapes harvested, while the average grape price in 2025 was $1,851 per tonne. This means that excise is now a substantially greater cost than the grapes that go into making the wine sold in the domestic market.

The Government also has increased the total amount of the alcohol health levy collected from the alcohol beverage industry to reduce alcohol harm to $17.135 million, on the basis of a CPI-linked adjustment. We are seeking increased transparency and engagement with Government on the effectiveness of projects funded by the levy to reduce the harmful consumption of alcohol in New Zealand.

Digital labelling opportunities for the future: In last year's annual report, we outlined the decision by Food Standards Australia New Zealand to mandate energy labelling on alcoholic beverages. The requirements have a three-year transition period, ending in 2028. We continue to advocate for consideration to be given to digital labelling (e.g. QR codes) to inform consumers. Digital labelling will help reduce costs for winegrowers and provide opportunities to reclaim valuable label space for wine.

Sale and supply of alcohol: We welcomed the additional operating flexibility for cellar doors over key public holidays and supported proposed changes to the Act to improve the licensing environment, including ensuring the local community remains the focus of challenges to licence applications and renewals.

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 these submissions were primarily within New Zealand, we also made submissions on some international issues.
For more information, please contact advocacy@nzwine.com.
We also worked closely with the Environment team on topics such as resource management reforms.

People

We continue to engage with government and support members to attract, develop, and retain skills and talent.

RSE WORKERS, TATTY BOGLER FORREST ESTATE, WAITAKI VALLEY. PHOTO: RICHARD BRIGGS

Workforce activities

NZW provides regular updates to members on seasonal workforce visas, including on the phasing out of the Specific Purpose Work Visa and the introduction of the Global Workforce Seasonal Visa and Peak Seasonal Visa settings to maintain access to international vintage workers. Webinars held with Immigration New Zealand and the Ministry of Social Development enabled members to hear directly from government agencies responsible for processing visas. The addition of Senior Winery Cellar Hand and Wine Laboratory Technician to the National Occupation List increased the number of roles eligible for Accredited Employer Work Visas. The Senior Winery Cellar Hand role is also eligible for the Global Workforce Seasonal Visa.

We attended consultations and submitted on the review of the Recognised Seasonal Employer (RSE) scheme to improve the operation of the scheme and provide certainty for employers. We therefore welcomed government announcements of practical improvements, while ensuring workers remain at the heart of the programme. RSE workers play an important role to meet peak seasonal workforce requirements in the vineyard, and in doing so help to support the industry's permanent workforce of more than 7,000 people. The changes will be implemented across a number of years, starting in 2027. Accommodation Standards consultations are currently underway, with decisions expected in September 2026.

Vocational education has been a major focus of the Advocacy team to ensure access to relevant skills and training for our New Zealand workforce. We have established a relationship with the Food and Fibre Industry Skills Board (which replaced Muka Tangata), coordinated industry input into the provider for work-based learners, and prepared for the upcoming review of horticulture qualifications.

Leadership and communities

The Young Viticulturist and Young Winemaker of the Year competitions support our future leaders, while also bringing together a special community of members and industry suppliers. In 2025, the Young Viticulturist of the Year was Anna Kelland from Constellation Brands in Marlborough, and the Young Winemaker of the Year was Ruby McManaway from Yealands in Marlborough.

An important part of these initiatives is to bring the wider community together, including our industry leaders and suppliers. This positive environment boosts camaraderie as we work together for a successful future.

Women in Wine NZ champions diversity and inclusion through national, regional, and online initiatives that foster connection, confidence, and equal opportunities. The Women in Wine Development Series helps members build skills, share ideas, and advance their careers.

Our Health and Wellbeing webpage provides a comprehensive list of resources that members can access, and we have also established closer contacts with Farmstrong and the Rural Support Trust.

PHOTO: RICHARD BRIGGS

ANNA KELLAND, 2025 YOUNG VITICULTURIST OF THE YEAR

PHOTO: RICHARD BRIGGS

RUBY MCMANAWAY, 2025 YOUNG WINEMAKER OF THE YEAR

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

Research

Over the last 12 months, Bragato Research Institute (BRI) has continued to deliver quality research and innovation for the New Zealand wine industry, working to ensure research investment is closely aligned with industry needs and delivers practical value for grape growers, winemakers, and the wider New Zealand wine industry.

BRI'S ROSS WISE MW AND DR JULIET ANSELL VISIT SHANE LIVINGSTON AT BURN COTTAGE.

DR ELLIE BRADLEY PLANTING DISEASE RESISTANT VARIETIES. CREDIT: STEPHEN GOODENOUGH

Responding to vineyard challenges

Managing rising fuel costs in the vineyard

In response to the fuel crisis, BRI developed practical resources to help growers manage vineyard fuel costs. Drawing on data from BRI's Carbon Calculator project, guidelines were produced to help growers prioritise vineyard activities and identify opportunities to reduce fuel and save costs while keeping vines healthy. Alongside this, practical strategies for immediate reduction of fuel use in vineyards were distributed through VineFacts.

Mothballing decision support

With growers across the country facing difficult decisions on whether to mothball or remove vines, BRI developed an economic model and decision tree. The tool supported growers by evaluating immediate pressures with long-term strategy, while considering factors such as economics and vineyard condition. The model can be tailored to individual sites, giving growers more accurate projections of their outcome. BRI delivered workshops in Gisborne, Hawke's Bay, Marlborough, and North Canterbury to help growers apply these tools.

Resilient genetics

Multiple audits of the wine sector have identified New Zealand's reliance on Sauvignon Blanc and its lack of genetic diversity as one of the biggest risks facing the industry. The Sauvignon Blanc 2.0 (SB2) programme completed a major milestone, the plant

SAUVIGNON BLANC 2.0 VINES BEING PROPAGATED AT ORMOND NURSERY. PHOTO: RICHARD BRIGGS

production phase, developing 10,000 new Sauvignon Blanc clones and planting them in a four-hectare vineyard in Lincoln. Work is now underway to screen the vines for useful traits, such as disease, frost, and drought tolerance, to make our industry more resilient to future challenges. While the SB2's headline goal is improved Sauvignon Blanc clones, SB2 has already created long-lasting assets for the New Zealand wine industry: new disease and virus testing capability, scalable screening tools, modern genetic 'fingerprinting', robust data systems, and strong global and local partnerships.

The Sauvignon Blanc 2.0 programme completed the plant production phase, delivering 10,000 new Sauvignon Blanc clones and planting them in a four-hectare vineyard in Lincoln.

New disease-resistant varieties for New Zealand

There has been keen interest in disease-resistant varieties (DRVs), as they require

NEXT GENERATION VITICULTURE VINES. PHOTO: RICHARD BRIGGS

The Next Generation Viticulture programme aims to improve vineyard profitability through the adoption of innovative, efficient canopy systems, while safeguarding wine quality.

fewer sprays. BRI and Bioeconomy Science Institute (BSI) collaborated to grow DRVs designed specifically for New Zealand's vineyards. Leveraging the SB2 platform, BRI has imported mildew-resistant seeds through quarantine and established them in the research vineyard. This work aims to find DRVs that thrive in our soils and climate, while delivering the wine quality, viticultural traits, and market fit our industry expects.

Enhancing vineyard productivity

The Next Generation Viticulture (NGV) programme aims to improve vineyard profitability through the adoption of innovative, efficient canopy systems, while safeguarding wine quality. The programme completed its second year, and results showed the NGV canopies have the potential to reduce the time and cost of vineyard operations, such as pruning, trimming, leaf plucking, and trellis work, to improve yield performance and consistency while maintaining grape and wine quality.

The four-year long spur pruning project as an alternative to cane pruning for Marlborough Sauvignon Blanc was completed. The results show long spur pruning can reduce labour requirements, and therefore costs, while

BRI organised 14 events for 858 attendees, including Grape Days and targeted workshops held across the country.

producing similar yield and quality, and has greater potential for full automation than cane pruning. Adoption of the new pruning technique during the project period has increased by 390%, with total vineyard area under long spur pruning going from 139 hectares to 549 hectares.*

Wine innovation

The Research Winery remained an important asset for the industry and enabled winemaking innovation for both industry clients and BRI-led research. During the 2026 vintage, the Research Winery processed 206 ferments and operated at 98% capacity. It isintegral to evaluating the effects of different vineyard interventions, such as NGV and long spur pruning, on the finished glass of wine. In partnership with BSI, BRI also expanded micro-vinification capability, designed for wine analysis of single vines, which will be important to the next phase of SB2 and the DRV project.

Knowledge transfer

Effective knowledge transfer is essential to ensure research can be used by members. This year, BRI organised 14 events for 858 attendees, including Grape Days and targeted regional workshops held across the country. BRI also supported major events such as the International Cool Climate Wine Symposium and WinePro.

Strengthening international collaboration

BRI brought keynote speaker Prof Dr Kai Voss-Fels from Hochschule Geisenheim University to the International Cool Climate Wine Symposium to present on how genetics can future-proof vineyards. Following the event, BRI hosted a range of international researchers from Oregon State University (US), ICVV (Spain), Catena Institute (Argentina), and Adelaide University (Australia).

Dr Darrell Lizamore visited key research partners in the US at Gallo, UC Davis, Cornell, and USDA to progress current projects, and presented at the International Grapevine Breeding and Genetic Symposium in Croatia.

PHOTO: RICHARD BRIGGS

BRI launched Grower Trials, a new initiative to support grape growers in testing new ideas or addressing practical challenges on their own vineyards.

Funding grower trials

In addition to its annual contestable funding, BRI launched Grower Trials, a new initiative to support grape growers in testing new ideas or addressing practical challenges on their own vineyards. BRI provides funding and support to ensure the trials will yield robust results that can be shared with the wider industry. Four trials were completed this season, in Hawke's Bay, Marlborough, and Central Otago.

**Figures derived from Grapelink, national vineyard area under long spur pruning.*

GRAPEVINE IMPROVEMENT PROGRAMME, CREDIT: STEPHEN GOODENOUGH

RESEARCH PROJECTS
2025–2026

BRI conducts in-house research and collaborates with research organisations throughout New Zealand.

NUMBER OF RESEARCH COLLABORATIONS IN FY26
19

TOTAL PROJECTS
35

BRI leverages strategic partnerships and co-investment to deliver more impact and value from levy funding alone.

LEVY FUNDING FOR FY26
$2.275
MILLION

TOTAL FUNDING FOR FY26
$ 5.465
MILLION
(levy leveraged 140%)

Projects by research location

BRI conducts research throughout New Zealand wine regions in vineyards, wineries, and the lab.

Note: some projects have multiple locations.

LOCATIONS

Auckland	1
Hawke's Bay	4
Wellington	1
Marlborough	16
Canterbury	4
Central Otago	3

PROJECTS	RESEARCH ORGANISATION(S)
Vineyard innovation	
Next Generation Viticulture programme	BRI
Evaluation of the short-term impact of remedial surgery on grapevine trunk disease and vineyard sustainability	Linnaeus, South Australian Research and Development Institute (SARDI), Sutton McCarthy
Rapid early detection of powdery mildew using VOCs to enable better control solutions	Scentian Bio
Elemental sulphur persistence on grapes and mitigation strategies	Lincoln University, University of Auckland
Increasing the financial sustainability of Chardonnay in Hawke's Bay through long spur pruning	BRI, Eastern Institute of Technology (EIT)
Long spur pruning as an alternative for Marlborough Sauvignon Blanc	BRI, Nelson Marlborough Institute of Technology (NMIT)
Rootstock trial	BRI
UV light in vineyards to reduce fungicide dependence	BRI, A Lighter Touch
Rootstock trial	BRI
Grapevine improvement	
Sauvignon Blanc Grapevine Improvement programme	BRI, Bioeconomy Science Institute, Lincoln University
Graft-derived drought tolerance: identifying and functionally characterising graft-transmitted elements	BRI
Rapid detection of fungicide-resistance in grapevine powdery mildew in New Zealand	BRI
RNAi virus relief	BRI
Incorporating genetics and epigenetics into the Central Otago Pinot Noir trial	BRI
National vine collection	BRI
Winemaking innovation	
Central Otago Pinot Noir clonal trial	BRI, Otago Polytechnic, Riversun Nurseries
Exploring reductive aromas in Pinot Noir	University of Auckland
Single vine wine: development of high-throughput oenotyping methodology	Bioeconomy Science Institute
Innovation in bulk wine shipping	BRI
Assessing the effectiveness of winemaking ingredients for the production of no- and low-alcohol wines	BRI
Targeted inhibition of Botrytis cinerea laccases to minimise oxidative damage to wine	Victoria University of Wellington, BRI
Precipitation of calcium tartrate and other compounds in wine	University of Canterbury
Sustainable winegrowing	
Integrated crop livestock system: High Wire (HW) trellis vineyards and sheep	Lincoln University, BRI, Greystone Wines
Planetary Facts for New Zealand wine	Planetary Accounting Network
Carbon calculator	BRI
Insect frass in viticulture: Assessing the potential of a circular solution	Bioeconomy Science Institute
Engineered containment solutions for safe temporary storage of grape marc	BRI
Grower trials	
Effect of harvest date on wine quality of Hawke's Bay Chardonnay	EIT, HBVine
The effect of yield manipulation on Chardonnay grape and wine quality parameters in Hawke's Bay	EIT, HBVine
Root carbohydrate reserves influence on Marlborough Sauvignon Blanc vineyard productivity	NMIT, Marlborough Grape Growers Cooperative
Defining subregional expression in Central Otago Pinot Noir	BRI, Central Otago Winegrowers Association (COWA)

Some projects remain confidential, so they are not included in this list.

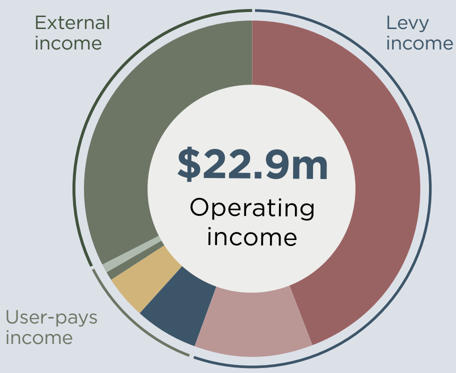
Financials

Statement of comprehensive revenue and expense by revenue stream.

Year ended 30 June 2026

OPERATING INCOME

$22.9m
↑3%



- Wine levy $9.6m ↑5%
- Grape levy $2.5m ↓37%
- Marketing user pays $1.3m ↓32%
- SWNZ $0.9m ↓1%
- Young Vit & Winemaker $0.2m ↑8%
- Other $1.4m ↓13%
- External funding for research $7.0m ↑54%

EXPENDITURE

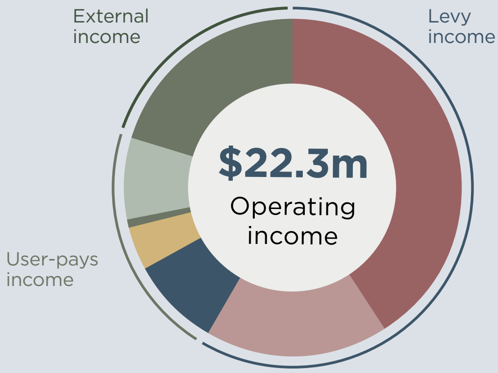
$21.1m
↓3%

See page 30 for detail.

Year ended 30 June 2025

OPERATING INCOME

$22.3m
↑31%



- Wine levy $9.1m ↑16%
- Grape levy $3.9m ↑13%
- Marketing user pays $1.9m ↑123%
- SWNZ $0.9m ↑7%
- Young Vit & Winemaker $0.2m ↑8%
- Other $1.7m ↑262%
- External funding for research $4.5m ↑35%

EXPENDITURE

$21.8m
↑12%

See page 31 for detail.

Commodity levy income and non-levy income are used to deliver activities (or programmes) across our strategic objectives. Non-levy income includes government and industry funding for research initiatives and sponsorship, and participation in user-pays activities including SWNZ, Young Vit & Young Winemaker, and events in New Zealand and overseas.

Expenditure by objective ($m)

Key achievements	Levy	Non-levy
Research and innovation Research Winery	$2.3m ↑26%	$6.0m ↑7%
International brand activity Trade Activation and PR	$2.2m 0%	$0.2m ↓69%
Administration General, governance costs	$2.8m ↑10%	$0.8m ↑1%
Events in New Zealand Wine Business Forum Industry Celebration Dinner	$0.1m ↓78%	$1.0m ↓7%
Environment SWNZ programme Spray Schedule	$0.6m ↑1%	$0.9m ↓61%
Member information VineFacts, NZW website, Grape Days Market Intel & Insights	$1.3m ↑9%	$0.04m 0%
Regions	$1.2m ↑15%	
International trade (Advocacy)	$0.3m ↑2%	
Domestic trade (Advocacy) Domestic submissions to government	$0.6m ↑4%	
People Women in Wine Labour strategy and RSE Young Viticulturist and Young Winemaker competitions	$0.2m ↑12%	$0.2m ↑5%
Biosecurity Submissions to government GIA partnerships	$0.4m ↑7%	
TOTAL	12.0m ↑6%	$9.1m ↓13%
TOTAL EXPENDITURE		$21.1m ↓3%

Financials

Statement of comprehensive revenue and expense by revenue stream.

	Year ended 30 June 2026				
	Wine levy	Grape levy	Total levy stream	User-pays & other	NZW consol 2026 totals
REVENUE					
Non-exchange revenue					
Membership levies	9,604,702	2,478,160	**12,082,862**		12,082,862
Exchange revenue					
Research funding				6,966,647	6,966,647
User-pays activity income				2,360,598	2,360,598
Other income				1,527,382	1,527,382
TOTAL REVENUE	**9,604,702**	**2,478,160**	**12,082,862**	**10,854,627**	**22,937,489**
LESS EXPENDITURE					
Operating expenditure					
Administration	1,133,543	292,471	**1,426,014**	767,240	2,193,254
Advocacy	313,380	80,857	**394,237**	275,496	669,733
Audit fees	51,557	13,303	**64,860**	21,620	86,480
Brand	1,445,626	372,994	**1,818,620**	54,415	1,873,035
Communication	56,818	14,660	**71,478**	4,832	76,310
Environment	529,495	136,618	**666,113**		666,113
Personnel	3,098,204	799,384	**3,897,588**	446,038	4,343,626
Regional funding	923,753	238,343	**1,162,096**		1,162,096
Research*	1,808,404	466,596	**2,275,000**	4,883,193	7,158,193
Sustainable Winegrowing support	49,375	12,740	**62,115**		62,115
Special projects (Biosecurity Response, CRM enhancements)	58,761	15,161	**73,922**		73,922
User-pays activity expenditure				2,311,096	2,311,096
TOTAL OPERATING EXPENDITURE	**9,468,917**	**2,443,126**	**11,912,043**	**8,763,930**	**20,675,973**
OPERATING SURPLUS / (DEFICIT)	135,784	35,034	**170,819**	2,090,697	2,261,516
OTHER EXPENDITURE Depreciation	49,612	12,801	**62,413**	363,548	425,961
TOTAL OTHER EXPENDITURE	49,612	12,801	**62,413**	363,548	425,961
SURPLUS / (DEFICIT) BEFORE TAXATION	86,172	22,234	**108,406**	1,727,149	1,835,555
Income tax expense	19,810	5,111	**24,921**		24,921
NET SURPLUS / (DEFICIT) AFTER TAXATION	66,362	17,123	**83,485**	1,727,149	1,810,634
OTHER COMPREHENSIVE REVENUE & EXPENSE Cashflow hedge reserve				(28,996)	(28,996)
TOTAL COMPREHENSIVE REVENUE & EXPENSE	**66,362**	**17,123**	**83,485**	**1,698,153**	**1,781,638**

** In 2025, Ernst & Young was appointed to manage BRI's financial accounts. Following this transition, they have supported BRI to revise their revenue recognition process to better reflect how research funding works operationally. For FY2026, this is reflected in an increase in reported profit; however, this is an accounting adjustment and does not constitute a change in BRI's cash position.*

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).

User-pays activities include events in New Zealand and overseas, SWNZ, and Young Viticulturist and Young Winemaker competitions.

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

			Year ended 30 June 2025		
	Wine levy	Grape levy	Total levy stream	User-pays & other	NZW consol 2025 totals
REVENUE					
Non-exchange revenue					
Membership levies	9,115,997	3,931,818	**13,047,816**		13,047,816
Exchange revenue					
Research funding				4,525,229	4,525,229
User-pays activity income				4,363,251	4,363,251
Other income				332,950	332,950
TOTAL REVENUE	**9,115,997**	**3,931,818**	**13,047,816**	**9,221,430**	**22,269,246**
LESS EXPENDITURE					
Operating expenditure					
Administration	968,386	417,674	**1,386,060**	758,643	2,144,703
Advocacy	235,884	101,739	**337,623**	418,200	755,823
Audit fees	41,920	18,081	**60,000**	20,000	80,000
Brand	1,179,970	508,993	**1,688,903**	52,355	1,741,258
Communication	40,580	17,503	**58,083**	3,964	62,047
Environment	457,322	197,247	**654,569**		654,569
Personnel	2,577,917	1,111,881	**3,689,798**	1,058,578	4,748,376
Regional funding	705,978	304,495	**1,010,473**		1,010,473
Research	1,295,524	558,341	**1,852,865**	3,725,797	5,578,662
Sustainable Winegrowing support	40,521	17,477	**57,998**		57,998
Special projects (Project Kārearea, Pinot Noir New Zealand 2025)	266,066	114,757	**380,823**		380,823
User-pays activity expenditure				4,144,536	4,144,536
TOTAL OPERATING EXPENDITURE	**7,809,069**	**3,368,127**	**11,177,196**	**10,182,072**	**21,359,268**
OPERATING SURPLUS / (DEFICIT)	1,306,928	563,691	**1,870,619**	(960,642)	909,978
OTHER EXPENDITURE Depreciation	34,980	15,087	**50,067**	355,567	405,634
TOTAL OTHER EXPENDITURE	34,980	15,087	**50,067**	355,567	405,634
SURPLUS / (DEFICIT) BEFORE TAXATION	1,271,948	548,604	**1,820,552**	(1,316,208)	504,344
Income tax expense	45,481	19,616	**65,097**		65,097
NET SURPLUS / (DEFICIT) AFTER TAXATION	1,226,468	528,987	**1,755,455**	(1,316,208)	439,247
OTHER COMPREHENSIVE REVENUE & EXPENSE Cashflow hedge reserve				(31,836)	(31,836)
TOTAL COMPREHENSIVE REVENUE & EXPENSE	**1,226,468**	**528,987**	**1,755,455**	**(1,348,044)**	**407,411**

This statement should be read with the Notes to the Financial Statements.

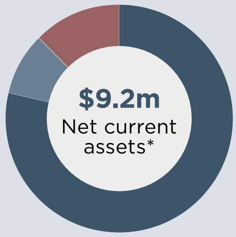
Financials

Statement of financial position

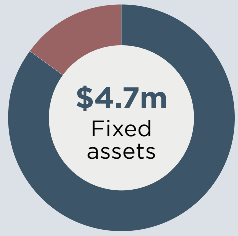
2026

ASSETS / RESERVES

$14.0m



- Levy incl BRI $7.5m
- User pays $0.7m
- Biosecurity $1m



- Winery incl fitout and equip $4.0m
- Other $0.7m

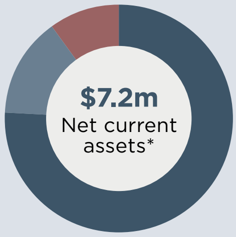
*Current assets less current liabilities.

	Wine levy	Grape levy	Year ended 30 June 2026 Total levy stream	User-pays & other	NZW consol 2026 totals
ASSETS					
Cash and bank balances	774,465	3,016,615	**3,791,080**	3,406,931	7,198,012
Accounts receivable and prepayments	2,098,566	1,466,904	**3,565,470**	1,617,521	5,182,991
TOTAL CURRENT ASSETS	**2,873,031**	**4,483,520**	**7,356,551**	**5,024,452**	**12,381,991**
Fixed assets	111,572	28,787	**140,360**	4,596,539	4,736,899
Intangible assets	802	**207**	**1,009**	915	1,924
Foreign currency contracts					
TOTAL NON-CURRENT ASSETS	**112,374**	**28,994**	**141,368**	**4,597,455**	**4,738,823**
TOTAL ASSETS	**2,985,405**	**4,512,514**	**7,497,919**	**9,621,907**	**17,119,826**
LIABILITIES					
Accounts payable and accruals	581,400	489,852	**1,071,252**	1,495,250	2,566,502
Event balances				588,078	588,078
TOTAL CURRENT LIABILITIES	**581,400**	**489,852**	**1,071,252**	**2,083,238**	**3,154,580**
NON-CURRENT LIABILITIES					
Accounts payable and accruals	6,492	1,675	**8,167**		8,167
TOTAL NON-CURRENT LIABILITIES	6,492	1,675	**8,167**		8,167
TOTAL LIABILITIES	587,892	491,527	**1,079,419**	2,083,328	**3162,747**
NET ASSETS	**2,397,513**	**4,020,987**	**6,418,500**	**7,538,579**	**13,957,079**
REPRESENTED BY EQUITY					
Retained earnings - levy activity	2,397,513	4,020,987	**6,418,500**	6,746,274	13,164,774
User-pays reserves				768,862	768,862
Cashflow hedge reserve				23,443	23,443
TOTAL EQUITY	**2,397,513**	**4,020,987**	**6,418,500**	**7,538,579**	**13,957,079**

2025

ASSETS/RESERVES

$12.2m



*Current assets less current liabilities.

Year ended 30 June 2025

	Wine levy	Grape levy	Total levy stream	User-pays & other	NZW consol 2025 totals
ASSETS					
Cash and bank balances	1,076,703	3,486,610	**4,563,313**	4,337,402	8,900,716
Accounts receivable and prepayments	1,690,421	1,149,065	**2,839,486**	1,169,276	4,008,762
TOTAL CURRENT ASSETS	**2,767,124**	**4,635,675**	**7,402,799**	**5,506,679**	**12,909,478**
Fixed assets	98,064	42,296	**140,360**	4,896,328	5,036,688
Intangible assets	705	304	**1,009**	2,355	3,364
Foreign currency contracts	2,075	895	**2,969**	(30)	2,939
TOTAL NON-CURRENT ASSETS	**100,843**	**43,495**	**144,338**	**4,898,653**	**5,042,991**
TOTAL ASSETS	**2,867,967**	**4,679,170**	**7,547,137**	**10,405,332**	**17,952,469**
LIABILITIES					
Accounts payable and accruals	526,492	670,852	**1,197,345**	4,092,569	5,289,914
Event balances				472,337	472,337
TOTAL CURRENT LIABILITIES	**526,492**	**670,852**	**1,197,345**	**4,564,906**	**5,762,251**
NON-CURRENT LIABILITIES					
Accounts payable and accruals	10,324	4,453	**14,777**		14,777
TOTAL NON-CURRENT LIABILITIES	10,324	4,453	**14,777**		14,777
TOTAL LIABILITIES	536,816	675,305	**1,212,122**	4,564,906	5,777,028
NET ASSETS	**2,331,151**	**4,003,864**	**6,335,015**	**5,840,426**	**12,175,441**
REPRESENTED BY EQUITY					
Retained earnings - levy activity	2,331,151	4,003,864	**6,335,015**	5,136,007	11,471,022
User-pays reserves				714,829	714,829
Cashflow hedge reserve				(10,410)	(10,410)
TOTAL EQUITY	**2,331,151**	**4,003,864**	**6,335,015**	**5,840,426**	**12,175,441**

Statement of Service Performance

Who we are

NZW is the national organisation of and for the members of the New Zealand grape and wine industry.

Purpose

Creating enduring member value by enhancing the reputation of New Zealand Wine and the sustainability of our industry.

Priorities

ADVOCACY

PEOPLE

BRAND

ENVIRONMENT

RESEARCH

NZW exists under the Wine Act 2003 and the Commodity Levies Act 1990. No later than every six years the grapegrowers and winemakers of New Zealand vote to support the industry's mandate and continue paying the levies. The last vote was held in 2021 and the Wine (Grape Wine Levy) Order 2022 and the Commodity Levies (Winegrapes) Order 2022 were approved. They expire in 2028.

Member engagement

To better understand the needs of the New Zealand grape and wine industry, NZW's undertakes a biennial survey of its members. The survey was conducted December 2025 (previous survey October 2023).

How responsive is NZW to your queries or requests?

84% ▼ 3%

Somewhat or very satisfied

Overall satisfaction with NZW performance in the previous 12 months

59% ▼ 20%

Somewhat or very satisfied

Advocacy

A trusted voice advocating for a supportive operating environment.

13 RESPONDING TO GOVERNMENT PROPOSALS

Submissions to government on policies impacting the industry. (2025 – 19)

10 ADVICE TO MEMBERS WEBINARS HELD

Topics included US tariffs, Gene Technology and International Packaging. (2025 – 14)

People

Supporting industry to attract, develop, and retain skills and talent.

NUMBER OF PARTICIPANTS

Young Viticulturist New Zealand Wine	Young Winemaker New Zealand Wine	NZW Mentoring Programme	Women in Wine New Zealand Wine
35 ENTRANTS (2025 – 33)	20 ENTRANTS (2025 – 20)	Not held in 2026 (2025 – 7 mentees, 7 mentors)	6 MENTEES 6 MENTORS (2025 – 10 mentees, 10 mentors)

Brand

Building and promoting a premium New Zealand Wine brand.

ONLINE BRANDING TOOLKITS

Supporting members to convey a consistent, strong image of New Zealand wine.

7 TOOLKITS were available to members

4,582 DOWNLOADS (2025 – 7 toolkits 3,658 downloads)

INTEL & INSIGHTS

Delivering relevant intel & insights through a programme of activity.

WINE BUSINESS FORUM SATISFACTION RATING

77% of attendees surveyed rate the event 8 or higher out of 10 overall (2025 – 92%)

For the year ended 30 June 2026

Environment

Demonstrating our commitment to a sustainable future.

6 NZW IS A SIGNATORY TO GIA AGREEMENTS* (2025 – 4)

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

66%

of members rank Environment (incl SWNZ, Biosecurity & VineFacts) as important in the members survey. (2023 – 76%)

Research

Delivering research that fills knowledge gaps specific to New Zealand's current and future grape growing and winemaking needs.

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

	2026		2025	
	LEVY	OTHER FUNDING	LEVY	OTHER FUNDING
Sustainable Winegrowing	84	142	67	36
Winemaking Innovation	214	36	154	55
Grapevine Improvement	1,430	1,437	1,578	1,359
Vineyard Innovation	863	963	651	958
Knowledge Transfer	295	12	289	13
Total	**2,887**	**2,578**	**2,739**	**2,421**

RATIO OF FUNDING 1.13:1 (levy:other funding)

ACTIVE RESEARCH PROJECTS

	2026	2025
Sustainable Winegrowing	5	5
Winemaking Innovation	7	4
Grapevine Improvement	7	6
Vineyard Innovation	12	9
Knowledge Transfer	4	0

RESEARCH WINERY

	2026	2025
Number of ferments (based on 17L ferments)	230	205
Tank utilisation	98%	88%

KNOWLEDGE TRANSFER

Grape Days 2026

A practical, thought-provoking programme to share the latest industry-driven and funded research with an emphasis on helping winegrowers apply the findings. Held in three key wine regions.

545 REGISTRATIONS (2025 – 564)

Communication

Collating and sharing knowledge to support decision-making.

OPENING RATES

WHAT'S FERMENTING Our monthly newsletter	VINEFACTS Provides weather and phenology data through the growing season	ADVOCACY UPDATES	BRAND UPDATES	ENVIRONMENT UPDATES
49%	58%	56%	47%	48%
▲ 2%	▲ 2%	▲ 4%	▼ 17%	▼ 1%

Judgements – NZW's 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. NZW 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 2025 to 30 June 2026 (with comparatives presented for the full year ended 30 June 2025).

**These statistics have been audited by KPMG.*

Statistics

Summary of New Zealand wine (2017–2026)

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Number of members***								1,426	1,412	1,416
Number of members who sell wine***	677	697	716	717	731	744	739	755	738	728
Number of members who only sell grapes***	726	699	692	694	732	706	681	671	674	688
Number of members with vineyards***	1,284	1,292	1,248	1,231	1,280	1,266	1,259	1,234	1,268	1,220
Producing area (hectares)	36,943	38,073	39,061	39,934	40,949	41,304	41,991	41,628	42,520	43,322
Average yield (tonnes per hectare)	10.7	11.0	10.7	11.4	9.2	12.9	11.9	9.5	12.2	10.2
Average grape price (NZ$ per tonne)	1,752	1,841	1,890	1,920	2,025	2,261	2,405	2,186	1,850	n/a
Tonnes crushed (thousands of tonnes)	396	419	413	457	370	532	501	395	519	440
Total production (millions of litres)	285.1	301.7	297.4	329.0	266.4	383.0	360.7	284.4	374.0	316.8
Domestic sales of NZ wine (millions of litres)	52.1	53.6	50.6	50.0	49.2	40.6	42.4	39.9	40.2	40.8
Consumption per capita NZ wine (litres)	11.0	10.9	10.3	10.0	9.6	7.9	8.2	7.5	7.5	7.6
Total domestic sales all wine (millions of litres)	92.0	94.5	93.1	91.7	90.2	89.0	85.7	78.9	77.0	75.6
Consumption per capita all wines (litres)	19.5	19.2	18.9	18.3	17.7	17.4	16.6	14.9	14.4	14.2
Export volume (millions of litres)	253.0	255.0	270.4	286.5	284.9	266.1	315.8	276.2	288.8	306.2
Export value (millions of NZ$ FOB)	1,663	1,705	1,825	1,923	1,870	1,953	2,405	2,110	2,098	2,108

N/A – Not yet available
*Estimate **Earlier years' vineyard numbers can be found on the NZW website: nzwine.com/en/media/statistics/vineyard-reports/
***NZW members are winemakers and grape growers who sell their products and pay a grape or wine levy on these sales.
Payment of the grape or wine levies entitles you to membership of NZW.

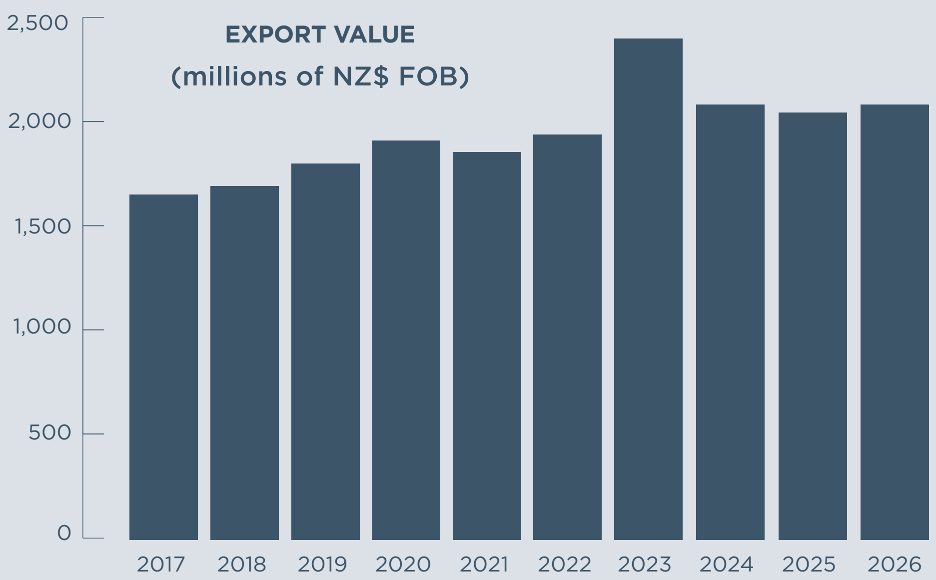
PRODUCING AREA (ha)

2017

36,943

2026

43,322*



New Zealand Winegrowers membership (2017–2026)

Number of members who sell wine by size	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Small	582	603	624	628	645	662	646	661	648	631
Medium	77	77	73	69	67	66	75	76	71	77
Large	18	17	19	20	19	16	18	18	19	20
TOTAL	**677**	**697**	**716**	**717**	**731**	**744**	**739**	**755**	**738**	**728**

* Up to 2007: Category 1 (Small) – annual sales not exceeding 200,000 litres. Category 2 (Medium)) – annual sales between 200,000 and 2,000,000 litres. Category 3 (Large)) – annual sales exceeding 2,000,000 litres.
** From 2008: Category 1 (Small)) – annual sales not exceeding 200,000 litres. Category 2 (Medium)) – annual sales between 200,000 and 4,000,000 litres. Category 3 (Large)) – annual sales. exceeding 4,000,000 litres.

Number of members who sell wine by region	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Northland	16	17	20	20	18	17	17	16	15	14
Auckland	109	102	100	99	99	98	93	95	94	86
Waikato/Bay of Plenty	8	10	7	9	8	6	6	8	7	7
Gisborne	18	17	16	15	33	37	37	36	39	37
Hawke's Bay	79	91	98	100	104	107	106	109	102	102
Wairarapa	64	69	72	67	67	67	69	68	64	67
Marlborough	139	141	150	158	159	160	163	169	169	172
Nelson	36	38	42	38	35	37	35	34	35	32
North Canterbury	65	67	68	71	68	71	64	69	66	69
Central Otago	137	136	135	133	134	137	143	142	140	136
Waitaki Valley		4	4	4	3	4	3	4	5	5
Other areas	6	5	4	3	3	3	3	5	2	1
TOTAL	**677**	**697**	**716**	**717**	**731**	**744**	**739**	**755**	**738**	**728**

Number of members who only sell grapes by region	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Northland*				4	4	3	5	1	0	0
Auckland*	4	3	8	5	5	5	4	6	4	5
Waikato/Bay of Plenty									1	1
Gisborne	36	33	31	27	14	12	12	11	13	11
Hawke's Bay	65	62	58	57	65	59	50	48	47	44
Wairarapa	17	13	14	14	19	25	18	23	19	24
Marlborough	519	510	509	514	531	518	513	485	498	506
Nelson	37	35	27	27	32	31	27	24	24	26
North Canterbury	14	9	13	10	19	15	16	23	30	29
Otago**										
Central Otago**	33	33	32	36	43	38	36	43	37	42
Waitaki Valley**	1	1						3	0	0
Other								1	1	0
TOTAL	**726**	**699**	**692**	**694**	**732**	**706**	**681**	**671**	**674**	**688**

*Auckland and Northland reported separately from 2020. **Central Otago and Waitaki Valley reported separately since 2017 (previously reported as Otago).

New Zealand producing vineyard area (2017–2026)

By grape variety (ha)	2017	2018	2019	2020	2021	2022	2023	2024	2025*	2026
Sauvignon Blanc	22,230	23,426	24,605	25,160	25,988	26,471	27,478	27,722	28,702	30,206
Pinot Noir	5,572	5,588	5,549	5,642	5,805	5,735	5,615	5,360	5,331	5,000
Chardonnay	3,114	3,106	3,179	3,222	3,186	3,159	3,099	2,963	2,932	2,879
Pinot Gris	2,369	2,471	2,413	2,593	2,766	2,773	2,787	2,772	2,745	2,649
Merlot	1,211	1,133	1,093	1,087	1,078	1,066	1,002	908	894	787
Riesling	721	679	572	569	620	592	576	547	549	530
Syrah	439	432	440	437	433	438	418	391	391	374
Cabernet Sauvignon	249	250	216	219	207	202	196	194	196	173
Gewürztraminer	229	221	206	217	186	190	181	164	160	154
Malbec	121	114	111	111	98	96	84	86	88	82
Sauvignon Gris**	91	97	91	93	91	90	87	86	86	82
Cabernet Franc							64	63	62	64
Albariño***	109	105	105	105	102	103	87	87	87	59
Viognier**	97	97	89	85	69	62	60	50	51	48
Other varieties	391	354	394	395	320	327	257	235	247	234
TOTAL	**36,943**	**38,073**	**39,061**	**39,934**	**40,323**	**41,304**	**41,991**	**41,628**	**42,520**	**43,322**

By region (ha)	2017	2018	2019	2020	2021	2022	2023	2024	2025*	2026
Northland			73	71	75	73	74	63	68	68
Auckland			313	319	283	266	269	243	258	243
Auckland/Northland	387	392								
Waikato/Bay of Plenty	13	15	12	12	13	13	6	4	4	4
Gisborne	1,246	1,181	1,163	1,191	1,221	1,232	1,239	1,224	1,265	1,300
Hawke's Bay****	4,615	4,678	4,883	5,034	4,737	4,722	4,623	4,572	4,605	4,411
Wairarapa	932	969	1,030	1,039	1,089	1,083	1,081	1,013	1,122	1,142
Marlborough	25,244	26,288	27,176	27,808	28,883	29,339	29,970	29,815	30,469	31,603
Nelson	1,093	1,162	1,105	1,102	1,086	1,067	1,069	1,076	1059	950
North Canterbury	1,472	1,457	1,368	1,369	1,489	1,448	1,467	1,486	1,497	1,490
Central Otago	1,886	1,873	1,875	1,930	2,029	2,013	2,115	2,058	2,106	2,045
Waitaki Valley	55	58	63	59	58	48	48	44	45	43
Other / Unknown							31	30	21	22
TOTAL	**36,943**	**38,073**	**39,061**	**39,934**	**40,962**	**41,304**	**41,991**	**41,628**	**42,520**	**43,321**

*Projections submitted in the 2026 Vineyard Report.
**Reported seperately since 2015.
***Reported seperately since 2023.
****The Hawke's Bay figures within the 2020 Report contained an error that has now been corrected in this document and the 2021 Vineyard Report. The Hawke's Bay vineyard area was overstated in the 2020 report by approximately 450 hectares. The error largely related to the figures for Sauvignon Blanc.
Central Otago and Waitaki Valley reported seperately since 2016.
Source: New Zealand Winegrowers Vineyard Register Reports

New Zealand vintages (2017–2026)

By grape variety (tonnes)	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Sauvignon Blanc	285,862	296,573	302,157	326,058	268,079	393,956	378,300	298,479	402,564	347,122
Pinot Gris	20,755	22,824	20,953	28,849	20,987	30,465	26,097	22,126	30,837	22,820
Pinot Noir	28,760	35,095	26,944	34,105	22,029	34,569	30,532	25,781	28,979	20,895
Chardonnay	26,843	26,371	25,729	27,568	23,507	29,762	22,528	19,150	22,488	18,662
Merlot	7,714	10,623	9,240	11,166	9,877	7,535	9,092	6,120	4,728	3,932
Riesling	3,880	3,776	4,776	4,510	4,407	5,024	6,001	4,125	4,571	2,113
Rosé					530	4,518	3,957	1,367	2,273	2,467
Syrah	1,733	2,126	2,230	2,392	2,537	2,104	2,072	1,351	1,403	1,212
Gewürztraminer	1,047	976	834	1,167	707	1,179	766	648	1,469	971
Cabernet Sauvignon	974	1,169	1,076	1,210	1,156	834	1,020	682	714	687
Malbec	697	782	741	793	535	663	656	234	430	437
Other Reds	401	456	506	522	540	526	444	375	439	415
Albariño		162	269	284	371	451	380	255	466	391
Sauvignon Gris	944	1,080	1,002	880	1,178	1,161	947	672	743	312
Grüner Veltliner	253	329	347	369	275	490	546	398	284	253
Cabernet Franc	373	350	473	452	458	472	507	232	274	188
Other Whites	824	250	232	271	144	193	128	173	269	182
Viognier	266	444	318	235	488	282	347	83	117	107
Semillon	249	385	304	292	289	263	215	176	206	92
Pinotage	145	153	142	122	96	131	87	58	81	66
Muscat Varieties	450	323	200	234	33	84	27	31	46	29
Arneis	239	152	91	162	91	86	12	29	22	15
All Hybrids								9	0	0
SURVEY TOTAL	**382,409**	**404,399**	**398,564**	**441,640**	**358,316**	**514,749**	**484,662**	**382,554**	**503,403**	**423,368**
INDUSTRY TOTAL*	**396,000**	**419,000**	**413,000**	**457,000**	**370,000**	**532,000**	**501,000**	**395,000**	**519,000**	**440,000**

By region (tonnes)	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Northland	121	113	319	269	248	195	182	159	223	162
Auckland	934	787	1,585	1,249	1,239	1,343	709	613	890	921
Gisborne	16,337	13,000	16,238	18,959	17,450	19,334	10,967	8,235	12,679	10,248
Hawke's Bay	33,679	41,061	37,173	43,247	41,138	40,172	38,409	24,143	35,417	27,332
Wairarapa	3,822	4,592	4,390	4,472	3,131	5,363	5,528	4,625	7,597	6,263
Marlborough	302,396	313,038	305,467	343,036	269,521	414,649	393,865	312,812	410,291	354,521
Nelson	8,540	9,120	12,370	11,572	7,804	10,867	11,472	11,593	12,166	7,959
North Canterbury	8,240	11,157	8,534	9,861	7,291	9,779	11,090	8,216	15,019	7,022
Central Otago	8,324	11,358	11,868	8,515	10,324	12,575	11,995	11,519	8,717	8,693
Waitaki Valley		170	41	114	23	188	210	254	283	103
Other**	16	3	579	347	147	286	236	384	121	144
SURVEY TOTAL	**382,409**	**404,399**	**398,564**	**441,640**	**358,316**	**514,749**	**484,662**	**382,554**	**503,403**	**423,368**
INDUSTRY TOTAL*	**396,000**	**419,000**	**413,000**	**457,000**	**370,000**	**532,000**	**501,000**	**395,000**	**519,000**	**440,000**

*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 survey.

ND: No data available

Source: New Zealand Winegrowers Annual Vintage Surveys

**Waikato/Bay of Plenty reported under Other.

Statistics

New Zealand wine exports (2017–2026)

		2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
United States of America	L	72.929	72.701	76.234	82.598	80.252	93.152	107.722	97.024	99.237	91.980
	NZ$	517.258	521.738	557.000	622.150	589.121	694.116	870.505	787.562	761.714	720.620
United Kingdom	L	74.638	74.435	82.728	82.448	80.005	67.518	79.494	69.209	73.156	84.867
	NZ$	389.272	386.740	446.584	464.092	448.864	434.160	537.078	440.823	409.407	426.922
Australia	L	59.672	56.059	56.335	61.852	65.819	57.397	69.504	57.204	53.075	53.219
	NZ$	371.099	366.997	367.722	365.083	379.836	365.881	443.726	370.579	329.658	320.574
Canada	L	11.388	12.776	12.412	12.278	11.036	12.917	12.900	12.791	15.243	17.408
	NZ$	107.434	127.933	130.133	135.961	112.725	141.355	146.144	145.965	176.442	185.983
Germany	L	1.728	1.685	8.413	14.021	13.503	7.030	12.223	9.283	11.461	14.703
	NZ$	10.740	9.061	44.917	66.384	56.854	36.354	71.137	47.051	54.025	54.998
China	L	2.270	2.520	2.525	2.002	2.088	2.613	2.743	2.762	4.272	7.344
	NZ$	31.758	37.385	39.177	26.698	28.017	36.426	36.335	38.224	56.202	69.841
Ireland	L	2.986	3.448	3.020	3.243	3.578	3.570	3.940	3.939	3.989	4.539
	NZ$	21.658	27.183	25.874	27.011	33.421	33.003	38.236	40.151	41.652	51.964
Singapore	L	1.306	1.338	1.314	1.148	1.148	1.001	1.233	1.340	1.269	1.508
	NZ$	18.596	19.165	18.884	16.526	16.912	17.129	23.669	24.565	24.823	29.233
Netherlands	L	8.203	9.322	4.767	3.707	3.102	2.734	2.834	3.258	2.148	2.227
	NZ$	45.439	50.853	28.655	26.149	24.095	23.485	24.724	26.300	20.440	21.973
Hong Kong	L	1.353	1.178	1.067	1.070	1.337	0.968	0.940	0.785	0.841	1.093
	NZ$	18.553	15.671	13.337	14.112	17.868	14.586	15.110	12.055	18.944	16.747
Japan	L	1.273	1.225	1.342	1.272	1.143	1.324	1.447	1.233	1.373	1.505
	NZ$	14.565	17.047	15.003	14.873	12.299	14.954	17.906	16.123	17.088	18.304
Denmark	L	1.252	1.322	1.362	1.381	1.553	1.790	1.791	1.410	1.477	1.836
	NZ$	8.368	8.594	8.897	8.719	9.769	12.177	13.102	10.692	11.734	11.200
Sweden	L	1.779	1.521	1.631	1.801	1.167	1.015	0.708	0.684	0.928	0.761
	NZ$	14.208	12.903	13.250	15.173	9.853	8.861	7.033	6.626	8.733	6.794
Norway	L	0.320	0.316	0.550	0.605	0.998	0.876	0.561	0.497	0.607	0.613
	NZ$	2.508	2.648	3.569	3.946	5.969	5.792	4.184	3.452	4.568	4.113
Finland	L	0.248	0.261	0.314	0.295	0.315	0.283	0.157	0.247	0.217	0.210
	NZ$	2.004	2.340	2.809	2.477	2.824	2.771	1.471	2.444	2.086	1.987
Others	L	11.618	14.979	16.351	16.740	17.901	11.896	17.630	14.562	19.478	22.415
	NZ$	89.507	101.377	109.304	113.339	121.748	112.323	154.615	137.812	160.804	167.060
TOTAL	**L**	**252.962**	**255.093**	**270.364**	**286.461**	**284.942**	**266.081**	**315.828**	**276.227**	**288.772**	**306.229**
	NZ$	**1,662.968**	**1,704.644**	**1,825.116**	**1,922.694**	**1,870.173**	**1,953.372**	**2,404.975**	**2,110.425**	**2,098.318**	**2,108.314**

All litre and NZ$ figures are in millions.

Source: Stats NZ

New Zealand wine exports by market (12 months to June 2026)

		White 750ml	White other	White total	Red 750ml	Red other	Red total	Sparkling	Fortified	Total
United Kingdom	L	19.423	62.327	81.750	1.455	1.296	2.751	0.366		**84.867**
	NZ$	180.292	216.698	396.990	21.278	6.385	27.663	2.269		**426.922**
	$/L	9.28	3.48	12.76	14.62	4.93	19.55	6.21		**38.52**
United States of America	L	61.301	29.552	90.853	0.894	0.033	0.928	0.200		**91.980**
	NZ$	589.403	112.781	702.185	16.471	0.174	16.645	1.791		**720.620**
	$/L	9.61	3.82	13.43	18.42	5.22	23.64	8.95		**46.02**
Australia	L	11.950	36.372	48.322	3.066	1.417	4.484	0.413		**53.219**
	NZ$	120.820	133.394	254.214	51.292	8.246	59.538	6.821	0.001	**320.574**
	$/L	10.11	3.67	13.78	16.73	5.82	22.55	16.51	246.33	**299.17**
Canada	L	12.667	3.379	16.046	1.174	0.144	1.318	0.044		**17.408**
	NZ$	157.591	9.744	167.335	17.724	0.254	17.979	0.669		**185.983**
	$/L	12.44	2.88	15.32	15.10	1.77	16.87	15.05		**47.24**
China	L	5.086	1.706	6.791	0.515	0.015	0.531	0.016	0.007	**7.344**
	NZ$	57.045	1.980	59.025	10.060	0.275	10.335	0.295	0.186	**69.841**
	$/L	11.22	1.16	12.38	19.52	17.96	37.48	18.89	27.97	**96.72**
Germany	L	0.648	13.614	14.262	0.080	0.360	0.440	0.001		**14.703**
	NZ$	6.678	45.466	52.144	1.081	1.744	2.825	0.029		**54.998**
	$/L	10.31	3.34	13.65	13.44	4.85	18.29	34.59		**66.53**
Ireland	L	4.347	0.000	4.347	0.160		0.160	0.033		**4.539**
	NZ$	49.216	0.001	49.216	2.236	0.007	2.243	0.505		**51.964**
	$/L	11.32	12.60	23.92	14.02	21.88	35.90	15.34		**75.16**
Singapore	L	1.282	0.003	1.285	0.205		0.206	0.018		**1.508**
	NZ$	23.631	0.037	23.668	5.081	0.007	5.088	0.476	0.001	**29.233**
	$/L	18.43	14.08	32.51	24.76	23.35	48.11	27.12	13.60	**121.34**
Netherlands	L	1.842	0.264	2.106	0.101	0.001	0.102	0.018		**2.227**
	NZ$	19.313	0.847	20.159	1.582	0.024	1.606	0.207		**21.973**
	$/L	10.48	3.21	13.69	15.67	23.32	38.99	11.29		**63.97**
Hong Kong	L	0.964	0.001	0.965	0.114	0.001	0.115	0.013		**1.093**
	NZ$	13.197	0.050	13.247	2.921	0.254	3.175	0.319	0.007	**16.747**
	$/L	13.69	44.19	57.88	25.62	386.79	412.41	23.76	256.88	**750.93**
Japan	L	0.892	0.146	1.038	0.350	0.072	0.423	0.044		**1.505**
	NZ$	10.229	0.723	10.952	6.269	0.486	6.755	0.597		**18.304**
	$/L	11.46	4.97	16.43	17.91	6.71	24.62	13.46		**54.51**
Denmark	L	0.909	0.842	1.751	0.036	0.048	0.084	0.001		**1.836**
	NZ$	8.150	2.072	10.222	0.609	0.348	0.957	0.021		**11.200**
	$/L	8.96	2.46	11.42	17.04	7.25	24.29	19.44		**55.15**
Sweden	L	0.423	0.229	0.652	0.110		0.110			**0.761**
	NZ$	4.288	1.081	5.370	1.425		1.425			**6.794**
	$/L	10.15	4.72	14.87	13.00		13.00			**27.87**
Norway	L	0.275	0.215	0.490	0.055	0.068	0.123			**0.613**
	NZ$	2.312	0.697	3.009	0.888	0.216	1.104			**4.113**
	$/L	8.41	3.24	11.65	16.19	3.18	19.37			**31.02**
Finland	L	0.075	0.083	0.158	0.005		0.005	0.048		**0.210**
	NZ$	0.699	0.611	1.310	0.081		0.081	0.596		**1.987**
	$/L	9.34	7.38	16.72	16.25		16.25	12.53		**45.50**
Others	L	12.453	8.593	21.046	0.913	0.251	1.164	0.204	0.001	**22.415**
	NZ$	122.324	25.818	148.142	15.029	1.264	16.293	2.591	0.033	**167.060**
	$/L	19.36	4.81	24.17	32.46	33.14	65.60	26.82	24.60	**141.19**
TOTAL	**L**	**134.536**	**157.325**	**291.861**	**9.233**	**3.707**	**12.940**	**1.419**	**0.008**	**306.229**
	NZ$	**1,365.187**	**552.001**	**1,917.188**	**154.026**	**19.684**	**173.711**	**17.187**	**0.228**	**2,108.314**
	$/L	**10.15**	**3.51**	**6.94**	**16.68**	**5.31**	**13.77**	**12.11**	**28.20**	**6.88**

All litre and NZ$ figures are in millions.

Source: Stats NZ

Statistics

New Zealand wine exports by variety (2017–2026)

Variety	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Sauvignon Blanc	217.890	220.065	231.194	249.445	242.876	228.479	279.171	247.211	251.134	276.242
Pinot Gris	7.151	7.740	8.678	9.207	10.671	8.953	10.310	8.881	9.353	10.579
Pinot Noir	12.510	13.171	12.331	10.282	10.868	10.469	9.165	8.492	8.365	8.732
Rosé	2.389	3.656	5.195	5.592	7.996	5.827	4.254	3.599	2.618	1.743
Chardonnay	6.172	4.766	5.088	4.649	4.914	4.883	4.148	3.781	3.721	4.379
Sparkling	1.088	1.167	1.150	1.366	3.272	2.216	2.716	2.316	1.687	2.638
Merlot	2.250	2.060	2.769	1.456	1.641	1.744	1.581	1.708	1.531	1.352
Riesling	1.099	0.962	1.047	1.184	1.089	0.898	0.933	0.962	1.164	0.655
Generic White	0.085	0.120	0.126	0.077	0.533	0.639	0.395	0.393	0.455	0.688
Cabernet or Merlot Blend	0.972	0.798	0.810	0.436	0.453	0.378	0.283	0.245	0.093	0.076
Other White Varietals	0.453	0.420	0.235	0.254	0.217	0.278	0.227	0.196	0.783	0.294
Syrah	0.283	0.375	0.346	0.273	0.236	0.355	0.201	0.181	0.116	0.139
Gewürztraminer	0.182	0.150	0.148	0.135	0.119	0.085	0.087	0.079	0.099	0.130
Generic Red	0.126	0.013	0.008	0.042	0.032	0.061	0.065	0.043	0.068	0.091
Other Red Varietals	0.128	0.064	0.085	0.047	0.074	0.066	0.053	0.051	0.038	0.065
Cabernet Sauvignon	0.011	0.023	0.011	0.019	0.020	0.047	0.029	0.015	0.024	
Sauvignon Blend	0.135	0.102	0.018	0.009	0.013	0.027	0.026	0.008	0.002	0.043
Sparkling Sauvignon	0.059	0.101	0.042	0.056	0.069	0.052	0.022	0.015	0.017	
Chenin Blanc	0.008	0.009	0.011	0.010	0.016	0.019	0.021	0.020	0.011	0.019
Chardonnay Blend	0.007	0.008	0.010	0.013	0.028	0.023	0.019	0.014	0.004	
Sweet Wines	0.051	0.032	0.024	0.021	0.019	0.018	0.012	0.008	0.004	
Fortified	0.001		0.002			0.001				0.000
Semillon	0.051							0.0003	0.0008	0.002
Syrah Malbec Viognier								0.0005		
Unidentified									0.002	
TOTAL*	**253.099**	**255.802**	**269.329**	**284.574**	**285.156**	**265.517**	**313.719**	**278.219**	**281.288**	**307.867**

All figures are in millions of litres.

*Data will slightly differ in total volume to those obtained through Stats NZ.

Source: MPI

Wine imports into New Zealand (2017–2026)

By country of origin	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Australia	28.517	31.527	32.118	29.795	27.427	33.566	31.609	28.290	26.602	25.839
Chile	2.397	1.606	1.522	1.943	2.166	0.825	1.134	3.097	2.874	1.649
France	2.807	2.762	3.069	2.807	3.475	4.154	3.536	2.998	2.787	3.275
Italy	1.381	1.786	1.870	2.362	2.539	3.148	2.666	2.129	2.444	2.372
Spain	0.716	0.557	0.654	0.955	0.692	0.807	0.554	0.431	0.454	0.394
South Africa	1.492	1.370	1.406	0.615	2.001	3.122	2.437	0.912	0.413	0.176
United States of America	0.207	0.259	0.226	0.449	0.743	0.503	0.443	0.450	0.411	0.489
Argentina	0.223	0.265	0.917	2.084	1.001	0.353	0.218	0.269	0.223	0.261
Others	1.751	0.758	0.685	0.608	1.014	0.692	0.671	0.472	0.641	0.326
TOTAL	**39.935**	**40.881**	**42.466**	**41.618**	**41.059**	**47.170**	**43.268**	**39.048**	**36.849**	**34.781**

By product type	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
White	18.206	21.525	21.237	20.603	18.935	21.255	21.339	17.991	16.381	63.897
Red	17.579	15.035	16.281	16.267	16.686	18.815	15.553	14.710	14.126	148.851
Sparkling	2.651	2.904	3.317	3.415	3.839	5.188	4.744	4.863	5.130	66.537
Champagne	1.397	1.371	1.567	1.288	1.544	1.858	1.580	1.444	1.172	107.183
Fortified	0.076	0.044	0.064	0.045	0.054	0.054	0.052	0.392	0.041	4.994
TOTAL	**39.909**	**40.879**	**42.466**	**41.618**	**41.059**	**47.170**	**43.268**	**39.048**	**36.849**	**391.461**

Country of origin		White	Red	Sparkling	Champagne	Fortified	Total
Australia	NZ$	34.841	69.440	25.581	0.000	1.410	131.272
	L	11.884	10.737	3.200	0.000	0.017	25.839
France	NZ$	6.158	23.141	2.588	53.591	0.090	85.568
	L	0.243	1.539	0.255	1.237	0.001	3.275
Italy	NZ$	1.903	7.487	15.375	0.000	0.066	24.832
	L	0.187	0.722	1.463	0.000	0.001	2.372
Chile	NZ$	0.828	1.729	0.013	0.000	0.000	2.571
	L	0.534	1.115	0.001	0.000	0.000	1.649
Spain	NZ$	0.450	2.554	0.519	0.000	0.268	3.791
	L	0.033	0.307	0.050	0.000	0.003	0.394
Argentina	NZ$	0.167	1.396	0.009	0.000	0.001	1.573
	L	0.053	0.207	0.001	0.000	0.000	0.261
South Africa	NZ$	0.302	0.812	0.021	0.000	0.003	1.139
	L	0.065	0.110	0.001	0.000	0.000	0.176
United States of America	NZ$	3.922	1.321	1.098	0.000	0.008	6.349
	L	0.401	0.069	0.020	0.000	0.000	0.489
Others	NZ$	0.797	1.265	0.853	0.000	1.356	4.271
	L	0.075	0.148	0.089	0.000	0.013	0.326
TOTAL	**NZ$**	**49.369**	**109.146**	**46.059**	**53.591**	**3.202**	**261.367**
	L	**13.476**	**14.953**	**5.079**	**1.237**	**0.035**	**34.781**

All litre and NZ$ figures are in millions.

Source: Wine Export Certification Services

Directory

BOARD MEMBERS

New Zealand Winegrowers

Fabian Yukich* (Chair)
Babich Wines

Emma Taylor** (Deputy Chair)
Springhill Horticulture Ltd

Michael Henley MW*
Aotearoa New Zealand Fine Wine Estates

Tracy Johnston*
Dayvinleigh Vineyard

Jim White*†**
Cloudy Bay Vineyards Ltd

Duncan McFarlane††**
Indevin Group Ltd

Tim Nowell-Usticke**
Mount Riley

Tanya Pouwhare*
Omaka Vines

Tim Rose*
Rose Family Vineyards

Simon Towns**
Constellation Brands

Board Appointed

Dr Jo Cribb
Governance Consultant

Melissa Tripe
Hawkswood Vineyard Ltd

**Member Class*

***Levy Class*

†Jim White, Cloudy Bay, joined the NZW Board effective 28 July 2025.

††Duncan McFarlane resigned from the NZW Board effective 13 August 2026.

REGIONAL WINEGROWING ASSOCIATIONS

Central Otago Winegrowers Association

Donald van der Westhuizen (Chair)
donald@cowa.org.nz

Carolyn Murray (General Manager)
carolyn@cowa.org.nz

Madeleine Bambridge
(Membership & Communications)
maddie@cowa.org.nz

centralotagowine.co

Gisborne Winegrowers Society Inc

Mark Thompson (Chair)
mark@gisvin.co.nz may change

Kaye Riddell (Administration)
hello@gisbornewine.co.nz

gisbornewine.co.nz

Hawke's Bay Winegrowers Inc

Sally Duncan (Chair)
sally@hawkesbaywine.co.nz

Peter Hurlstone (Deputy Chair)
peter.hurlstone@vinarchy.com

Brent Linn (CEO and Regional Representative)
brent@hawkesbaywine.co.nz

hawkesbaywine.co.nz

Marlborough Winegrowers Association Inc & Wine Marlborough Ltd

Tracy Johnston (Chair)
tracy@dayvinleigh.co.nz

Marcus Pickens (General Manager)
marcus@winemarlborough.nz

Sarah Linklater (Marketing Communications Manager)
sarah@winemarlborough.nz

marlboroughwinenz.com

Nelson Winegrowers Association Inc & Wine Nelson

Blair Gibbs (Chair)
blair@drinkscabinet.nz

Lynda Colligan (Administration)
info@winenelson.co.nz

tastenelsonwines.nz

North Canterbury Winegrowers

Matt Barbour (Chair)
mattbabour77@hotmail.com

Peter Bosworth (Treasurer)
pbos@xtra.co.nz

Katie Lumbar (Deputy Chair)
katie@waiparasprings.co.nz

Britteny Duval (Administration)
admin@ncwineregion.co.nz

northcanterburywines.co.nz

Northern Winegrowers & Grapevine Improvement Association Inc

Peter Jones (Chair)
peter.jones@thelandingnz.com

Wairarapa Winegrowers Association

Wilco Lam (Chair)
wilco@oraterra.nz

Rebekah Glover (Marketing)
marketing@wairarapawine.co.nz

wairarapawine.co.nz

For a 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**

SUB-REGION WINEGROWING ASSOCIATIONS

Matakana Winegrowers Inc

Hegman Foster (President)
omahabayvineyardobv@gmail.com

matakanawine.co.nz

Northland Winegrowers Association

Kim Gilkinson (Chairperson)
kim@dancingpetrel.com

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

northlandwinegrowers.co.nz

Waiheke Winegrowers Association

Rory Dunleavy (Chair)
rory@temotu.co.nz

David Gunson (Secretary)
david.gunson@hotmail.com

Randal Peart (Treasurer)
winemaker@kennedypointvineyard.com

waihekewine.co.nz

Waitaki Valley Winegrowers Association

Dave Sutton (Chair)
dave@tekanoestate.com

waitakiwine.com

West Auckland Winegrowers

Michael Brajkovich MW
michael@kumeuriver.co.nz

Key Contacts

Chief Executive Officer
New Zealand Winegrowers

Anishka Jelicich
+64 27 208 4902
anishka.jelicich@nzwine.com

Chief Executive Officer
Bragato Research Institute

Dr Juliet Ansell
+64 27 280 5294
juliet.ansell@bri.co.nz

NEW ZEALAND WINEGROWERS INC.

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

PO Box 90276
Victoria Street West
Auckland 1142

Level 4, 5–7 Kingdon Street
Newmarket, Auckland 1023

Level 2, 40 Lady Elizabeth Lane
Wellington 6011

Marlborough Research Centre
85 Budge Street, Blenheim 7201

General Manager Advocacy & General Counsel

Sarah Wilson
+64 27 700 6008
sarah.wilson@nzwine.com

General Manager Brand

Charlotte Read
+64 27 507 5077
charlotte.read@nzwine.com

General Manager Sustainability

Dr Edwin Massey
+64 21 192 4924
edwin.massey@nzwine.com

Communications Manager

Chrissy Powlesland
+64 21 331 398
chrissy.powlesland@nzwine.com

External Relations Manager

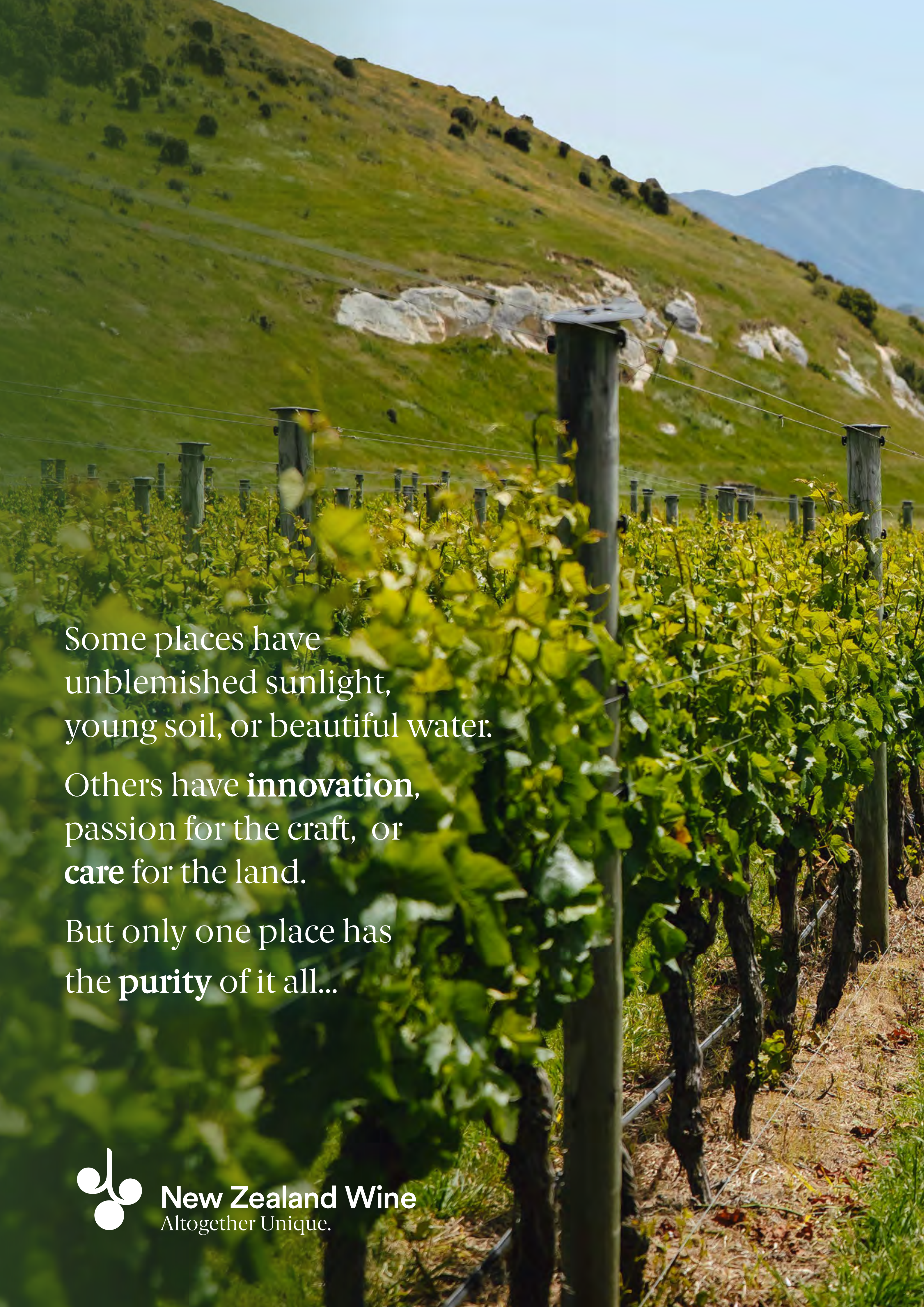
Nicola Crennan
+64 21 707 929
nicola@nzwine.com

Financial Accountant

Suzanne Hill
+64 21 794 380
suzanne.hill@nzwine.com

GISBORNE. PHOTO: RICHARD BRIGGS

Printed on sustainably produced paper using environmentally responsible printing practices.


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.