New Zealand Winegrowers Inc.

Annual Report 2025

Altogether Unique.

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

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

Purpose

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

Priorities

Environment
Brand
Advocacy
People
Research

New Zealand Winegrowers Inc.
Annual Report
2025

COVER: ELELPHANT HILL, HAWKE'S BAY. PHOTO: RICHARD BRIGGS

Chair's Report


MATAWHERO, GISBORNE. PHOTO: RICHARD BRIGGS

Across three decades of consumer-driven international growth and success, the New Zealand wine industry has built a strong reputation for highly distinctive, premium, sustainable wines.

That reputation has lifted exports to over $2 billion per annum. Success has fuelled investment in 42,000 hectares of vineyards across regional New Zealand, state-of-the-art processing facilities, and strong brands that proudly bear New Zealand on the label.

But now growers and wineries are uncertain about the outlook for our sector. With exports comprising 90% of our sales, the industry is concerned by the slow global economy and weak wine markets in key export destinations.

These trends have been exacerbated by new regulatory impositions, including tariffs in the USA and taxes in the UK.

In New Zealand, these global trends have been manifested in sluggish exports to established markets, reduced demand for grapes, and lower grape prices. Inventory levels are higher than wineries desire and short-term growth prospects are subdued. Production costs have grown significantly, and for those selling in the domestic market, excise has increased by 25% in the last four years.

On the other hand, the New Zealand Wine brand health is strong. According to market researcher IWSR, lighter refreshing styles are outpacing overall wine category performance. This shift is driven by varietals with more refreshing palate profiles, which New Zealand excels in delivering. This enables our wineries to connect with the next generation of consumers who will drive future international growth opportunities.
A strong reputation and in-market performance

ahead of competitors are real positives on which to build for the future, however, producers are currently navigating their way through a complex and uncertain business environment.

A strong reputation and in-market performance ahead of competitors are real positives on which to build for the future...

Subdued growth

Representing nearly 90% of total New Zealand wine sales, exports grew by 5% in volume in the past 12 months, with a slight decline in value of less than 1% to $2.10 billion.

Despite imposition of the higher tariffs late in the year, the major market for New Zealand wine remains the USA with exports valued at $762 million, down 3% in the past year. While the increased tariffs have been in place since April with a further increase in August, it is not yet possible to discern the effect of these in the export data.

The strongest growth in the past year has been from emerging export destinations. Shipments to China grew 47% to $56 million, while exports to South Korea lifted 92% to $44 million. Overall exports to second-tier markets (all those except the UK, USA and Australia, which take over 70% of our exports) grew 17% in the past 12 months to just under $600 million. This reflects strong trade and consumer interest as well as the ability of wineries to develop new markets with improved supply.

Despite the subdued export performance overall, in-market sales data consistently show the New Zealand category outperforming competitors in key markets. This speaks positively to the reputation and standing our wines have built up over many years and is a sign of our future growth potential. The total retail sales value of New Zealand wine in export markets is now estimated to be $4.9 billion.

Domestic wine sales in decline

Our home wine market in New Zealand is the fourth-largest market overall for our wines. Many of our smaller wineries only sell domestically and it is especially important as a market incubator for small, innovative producers. Tough economic conditions are having an impact on sales but there are longer-term trends as well. Wine consumption is at its lowest level in more than 20 years; per capita wine sales are at a 30-year low.

Reduced consumption by Kiwis reflects evolving consumer trends, generational shifts, and new buying patterns. These are challenges wineries need to respond to dynamically if wine is to regain favour with New Zealand consumers.

More positively, wine tourism continues to be a growth opportunity. Currently, 27% of tourists to New Zealand visit a cellar door for tasting, with wine tourists having a higher satisfaction rate than tourists generally. This data demonstrates the value-add for our regions and communities from having a vibrant winery sector that contributes so positively to the tourism and hospitality sectors.

Vintage 2025

Favourable weather conditions in the run-up to vintage 2025 delivered a crop that would have significantly exceeded any previous vintage in New Zealand's history. Throughout the country, vintage weather was marked by warm, dry days and cool nights—positive conditions for a high-quality harvest.

Against the backdrop of an uncertain demand outlook, it was unsurprising that wineries limited their grape intake. While this bodes very well for the wine quality, it meant, for the first time in many years, that a significant quantity of grapes was left unharvested.

The sight of unharvested grapes lingering on vine is emblematic of the uncertainty facing producers. For some growers, not selling their crop will have seen their income slashed in the current season. For wineries, inventories will have been higher than expected and they did not want to add to that pressure by producing more wine than they could expect to sell.

Despite grapes being left on the vine, vintage 2025 is still the second-largest harvested by the industry. The increased supply will offset the small vintage in 2024 but will challenge wineries to grow sales over the next 12 months.

Delivering value to members

On 3 April 2025, right in the middle of vintage—the busiest time of the year for growers and wineries—over 180 members participated in a webinar focused on the latest international trade developments. Similarly, at the end of the month, more than 200 members signed up for a webinar on market opportunities in the USA. In between, opening rates for major emails to members averaged more than 60% while over 1,700 industry participants read *What's Fermenting* (our digital newsletter).

Data on our engagement with members in April is typical of our interactions with growers and wineries during the course of a year. This is a two-way exchange that enables us to deliver information and activities of value to members while also receiving feedback and queries. This engagement spans the full range of our activities—from Advocacy and Research to Brand, Environment and People—and is a critical enabler of our service delivery to members.

As an industry-led programme, over the past three decades SWNZ has been able to swiftly and surely adapt to the evolving needs of our producers and the market.

Sustainability milestone

In 1995, Sustainable Winegrowing New Zealand (SWNZ), our sector's major sustainability programme, launched with just five participating vineyards. Today, SWNZ-certified vineyards cover 98% of the more than 40,000 hectares of producing vineyards, the highest coverage for any national industry certification programme across the globe.

SWNZ has been a huge success for our sector. It was launched by the industry, for the industry, and for our consumers, not because we were forced into it but because it was the right thing to do. Today it continues to guide our growers and wineries along the right path.

As an industry-led programme, over the past three decades, SWNZ has been able to swiftly and surely adapt to the evolving needs of our producers and the market. Recent initiatives have included releasing the Roadmap to Net Zero 2050, and in the last 12 months, the introduction of compulsory biosecurity planning for all SWNZ vineyards.

Looking forward, SWNZ needs to continue to evolve to meet the changing needs of markets, regulators and our sector. We are currently reviewing whether our People focus area needs to be updated to meet current and expected future market gatekeeper requirements.

Protecting our home base

Our ability to sustainably and profitably grow grapes and make and sell wine in New Zealand is heavily influenced by the regulatory environment. Ubiquitously, excise continues to increase year after year, to the cost of producers and consumers.

Currently, major changes are proposed to the Resource Management Act (RMA) and related legislation. We see this as an opportunity to both protect the environment and to facilitate sustainable utilisation of resources. We have been working with the Ministry for the Environment (MfE) on water issues, and through Project Raumatatiki to design a tool to facilitate compliance with new water regulations. We expect SWNZ to better enable members to meet any future regulatory requirements that result from government policy on freshwater planning for viticulture.

Changes to regulation of gene technologies have also been a focus. This is an important issue for the sector as there are both opportunities and risks to be had from the new regulatory framework. We engaged closely with the organic grape and wine sector as we developed our submission on this. We are now working to develop a policy that will guide our own research and other activities once the new legislation is in force.

New Zealand Wine. Altogether Unique.

Our commitment to sustainability is a core pillar of the New Zealand wine story. In the past 12 months, 30 years of SWNZ has been highlighted in all our brand activity, including our first major New Zealand-based event since COVID—Pinot Noir New Zealand 2025. The event was a huge success with wineries from across New Zealand participating.

A key component of the Pinot Noir event included hosting international media and trade who experienced New Zealand wine regional tours. Many of our guests went on to write about their experiences and they have shared their discoveries in print, online, and with peers. Media stories published by our hosted international guests currently have an equivalent advertising value of $8.9 million, representing an ROI of $37:$1, with more articles expected. We now have a programme of follow-up events, masterclasses, and opportunities for tastings underway in-market that build on the momentum generated by Pinot Noir New Zealand 2025.

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The event reaffirmed the immense value of bringing guests to our country for an immersive wine experience. Based on this, we have committed to Sauvignon Blanc New Zealand 2027, around which we will build a programme of events and activities that will enable our wineries to tell the Altogether Unique New Zealand wine story and, like Pinot Noir New Zealand 2025, gives us the opportunity to host international guests again.

Events complement our ongoing brand activities—Intel and Insights, our Education programmes in international markets, and participation in major trade fairs. In addition, this year, given challenging economic conditions, we have been exploring a programme to support New Zealand wineries active in the USA. This programme is still in development and will require support from a range of wineries to get off the ground.

Accessing markets

Ensuring competitive access to markets for New Zealand wine brands is a key driver of our involvement in international trade issues. Currently, around 60% of wine export volume enjoys tariff-free access to markets. The network of New Zealand's free trade agreements, including the recent UK, EU and UAE deals delivered by successive governments over the past four decades, has been an important foundation on which our export growth has been built.

Trade issues in the past year have been dominated by the trade and tariff agenda of the new administration in the USA. Developments have been keenly watched by all members, even those not exporting to the USA. Historically, New Zealand wines exported to the USA only encountered low tariffs (in the range of a few cents per bottle) but they are now experiencing an additional 15%.

Beyond the direct cost on imports to the USA, producers are concerned at the impact the tariffs will have on the broader USA wine market. New or higher taxes and tariffs are generally not positive for the development of any wine market. With the USA wine market already struggling, higher tariffs are unlikely to be good news for consumers.

Our members continue to look to us for guidance on many trade and regulatory issues. We have deep connections with the trade fraternity in New Zealand and with international bodies such as the International Organisation of Vine and Wine (OIV), World Wine Trade Group (WWTG) and FIVS (a global wine and spirits federation); these inform our winemaking and labelling guides and the other materials we produce for members, as well as the helpdesk services we provide. We work very closely with agencies such as the Ministry for Primary Industries (MPI) and the Ministry of Foreign Affairs and Trade (MFAT) on wine trade matters and value their support for the industry over many years.

Refreshed research strategy

We reported last year that Bragato Research Institute (BRI) had established new governance frameworks to ensure member needs are front and centre in designing the future BRI research programme.

The benefits of this change have been seen in the past year with the refresh of the BRI Research Strategy. The new five-year Research Strategy will guide future investment aligned to seven research priority outcomes that have been co-developed with growers and wineries. The refreshed strategy has been welcomed by members.

Alongside the new strategy, BRI continues to invest in its major programmes. Sauvignon Blanc 2.0 is in its third year and has established a 2.5 hectare breeding vineyard. New this year is the Next Generation Viticulture programme, launched in September 2024, which aims to improve vineyard profitability through the adoption of innovative, efficient canopy systems.

Engagement with members continues to be a focus for BRI. Attendance for Grape Days was strong again this year. Member engagement has also been important to assist the industry to understand the implications of the new legislation proposed to regulate gene technologies in New Zealand. BRI expertise has been critical in explaining the scientific complexities of these new technologies and the potential impact on our sector.

Our People

It is said that wine is a reflection of place; while true, it is also clear that wine reflects the people who grow the grapes, and make, market and sell the wine. Our industry employs 7,000 New Zealanders full time, supported by a range of temporary workers who help the industry through its seasonal peaks.

Our People activities aim to attract, develop and retain our skilled and talented staff in the sector. Programmes such as Women in Wine (WiW), Young Winemaker of the Year, Young Viticulturist of the Year and our mentoring programmes flourish with strong member support.
This year we are particularly proud to be celebrating 20 years of the Young Viticulturist of the Year programme.

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PHOTO: RICHARD BRIGGS

The New Zealand Wine People Survey Report 2024 is a snapshot of the people who help make New Zealand wine what it is. The goal of the report is to understand the impact of programmes such as WiW and to capture data relating to the changed work landscape over the past five years. The report shows progress in some areas, and others that require more work. We will use the report's findings to inform development of our future People activities.

Finally, we are pleased to add Mark Allen, Jenny Dobson, Judy Finn, Clive Jones, Dr Richard Smart, and Gwyn Williams to the Roll of Fellows of NZW. Each has made a significant contribution in their area of expertise to the development of our sector. Across many decades they have helped to grow and nurture the success of our industry—their elevation to fellowship is well deserved.

Improving governance

Over three years ago we established a Working Group, comprising a mix of Board and industry representatives, to review all aspects of NZW governance, representation and levies. The goal was to ensure NZW was fit for the future to deliver on its mission of creating enduring value for our members.

The Working Group produced its report this year, which was shared with members. As a result of the feedback from members, the Board is recommending change proposals that members will be asked to vote on at our October AGM. Those proposals envisage the Board reducing from 12 to nine members. It is proposed that six directors will be elected by members and, provided there is appropriate representation of both growers and wineries, three independent directors, up from the current two. Other changes are also being proposed, including the appointment of up to two associate directors—these positions will be reserved for young professionals in our industry who are looking to gain governance experience.

In addition to these proposals, which we believe will modernise the Board and its role, the Board has also commenced discussions with MPI on changes to the wine levy system. The levy proposals that emerged from the Working Group for a three-tier wine levy system are not explicitly provided for in the current legislation. Enabling these improvements to the levy system will be another step in future-proofing NZW.

We have also been engaging with regional bodies to identify how we can work more closely together to support both regional and national activities. These discussions are important in ensuring that there is no duplication of effort, and the responsibilities and accountabilities are clear.

The path forward

Much of the current focus of industry activity is on the immediate challenges confronting growers and wineries. Market and economic developments are compounding industry-specific issues to create a highly uncertain environment.

While much has changed since 2020, the fundamentals that have made New Zealand wine successful over the past three decades have not. Success in the future will reflect this: we must continue to produce highly distinctive, premium and sustainable wines that are an enduring reflection of New Zealand and its people.

As the national industry body, NZW is working hard to support growers and wineries in their businesses. We have confidence in the future, and in the contribution our grape and wine industry will make to New Zealand, its regions and communities.

Fabian Yukich
(Chair)

Emma Taylor
(Deputy Chair)

30 YEARS
SUSTAINABLE WINEGROWING NEW ZEALAND

New Zealand Wine
COMMITTED TO A SUSTAINABLE FUTURE

Celebrating 30 Years

YEALAND ESTATE, MARLBOROUGH.

"To mark this achievement, the release of the 2025 Sustainability Report offered a deep dive into independently audited data from the SWNZ programme. The report provides a powerful snapshot of our sustainability journey, highlighting our progress and commitment across six key focus areas: Climate Change, Water, Waste, Soil, Plant protection, and People."

The New Zealand wine industry is well placed to be a global leader in the production of low-emission wine, even with the distances our wines need to travel. Our industry goal of being Net Zero by 2050 has us firmly committed to a low-emissions pathway, and exciting developments in vineyards and wineries are already well underway.

We're focused on being a world leader in efficient water use, achieving zero waste to landfill by 2050, and protecting and enhancing the health of our soils. For our people, our goal is to continue leading the way as an industry of choice.

MEASURING PROGRESS

The snapshot below of positive trends for Climate Change and Water (using comparative data versus 2022) shows that our members are helping to drive change for a better future.

CLIMATE CHANGE

56% ▲ 15%
of vineyards are implementing specific initiatives to minimise their carbon footprint.

30% ▲ 11%
of vineyards are upgrading their equipment to reduce energy consumption.

68% ▲ 10%
of wineries are implementing specific initiatives to minimise their carbon footprint.

63% ▲ 8%
of wineries are using lightweight glass bottles as one of their packaging methods.

15% ▲ 3%
of wineries have installed solar energy sources.

WATER

94%
of vineyards optimise their water applications for irrigation.

24% ▲ 5%
of vineyards are benchmarking their water use over time.

18% ▲ 8%
of vineyards are purchasing new equipment that enables water efficiencies.

100% ▲ 8%
of wineries have initiatives to conserve or reduce water use.

79% ▲ 8%
of wineries have leak detection programmes.

50% ▲ 1%
of wineries are recovering and recycling cleaning water.

HIGHLIGHTS

98% ▲ 2%
of all producing vineyard area is certified by SWNZ.

90%
of wine is produced in SWNZ-certified facilities.

Environment

Demonstrating our commitment to a sustainable future.

CLIMATE CHANGE

WASTE

PEOPLE

PLANT PROTECTION

WATER

SOIL

2025 marks a proud milestone—30 Years of SWNZ

For over three decades, SWNZ has led our industry's commitment to a sustainable future. Driven by the dedication of our members, the programme's widespread adoption stands as a true testament to its success. Today, 98% of New Zealand's vineyard area is certified sustainable through SWNZ, and over 90% of our wine is produced in SWNZ-certified facilities.

Widely recognised as a world-leading sustainability programme—and one of the first of its kind in the global wine industry—SWNZ continues to demonstrate our commitment to a sustainable future. This remarkable milestone has attracted significant attention and further strengthened the reputation of New Zealand wine on the world stage.

To mark this achievement, the release of the 2025 Sustainability Report offered a deep dive into independently audited data from the SWNZ programme. The report provides a powerful snapshot of our sustainability journey,

The information gathered from members through SWNZ submissions provides us with data to support market access.

GISBORNE. PHOTO: RICHARD BRIGGS

highlighting our progress and commitment across six key pillars: climate change, water, waste, soil, plant protection, and people.

Well received by international wine media and industry stakeholders, the report has helped further elevate New Zealand's global reputation for producing distinctive, sustainable wines.

Continuous improvement

Over the past year, SWNZ has been assessed by a range of domestic and international review agencies, such as Sweden's Systembolaget. These reviews have highlighted SWNZ's inclusive approach to continuous improvement as a key strength of the programme. They have also identified opportunities to make the programme more robust.

Responding to this feedback has been a key priority in the last 12 months for the Environment team and is vital for ensuring preferential access in a range of markets. It highlighted an increased push for strong evidence of sustainable wine production from many major retailers and market gatekeepers. The information gathered from members through SWNZ submissions provides us with data to support market access.

People focus area

The Environment team is focused on refining and strengthening SWNZ to ensure it is fit-for-purpose and relevant. A major priority for 2025/26 is to review the People focus area to improve this component of the programme and ensure we continue to be an industry of choice for workers and that we are aligned with market expectations.

Roadmap to Net Zero 2050

In August, we released the NZW Roadmap to Net Zero 2050. The Roadmap outlines crucial milestones and identifies key emission-reduction opportunities for vineyards and wineries that will help the industry address the challenges posed by a warming climate. Setting out these objectives transparently is important to our reputation as a producer of premium sustainable wine. The Roadmap will help to enhance our market access, protect our social licence to operate, and help to reduce ongoing production costs. Like the Sustainability Report, the Roadmap captured the interest of media and commentators in many of our major markets, along with being a key topic of discussion at the influential Sustainability in Drinks event in London in October 2024. At Grape Days 2025 it was a key topic of discussion and has been a springboard for several exciting research projects being led by BRI.

Biosecurity

Biosecurity remains a high priority for NZW. This year a key focus has been engaging with members to assist the introduction of mandatory biosecurity planning requirements into SWNZ. The Biosecurity team delivered planning-support workshops for members across the country through May and June 2025. Member turnout and engagement for these workshops was high and feedback has been positive. Incorporating these requirements into SWNZ will help to significantly raise the level of biosecurity awareness and participation amongst growers, contractors, and other visitors to vineyard sites, providing better protection for the industry against the threat of new pests and diseases. The Biosecurity team will continue to support members with these new requirements into the future.

Our continued participation in the Government Industry Agreement (GIA) for biosecurity readiness and response enables us to leverage investment from our partners to ensure improved readiness for our highest-risk pests and disease. This year our work has focused on developing a response Operational Agreement for *Xylella fastidiosa*, the causal agent of Pierce's disease, a significant

TE MATA ESTATE, HAWKE'S BAY. PHOTO: RICHARD BRIGGS

threat to grape growing. The Operational Agreement is expected to be finalised in late 2025. Completion of this agreement means all sectors impacted by *Xylella* will better understand in advance the share of costs they will be liable for, in the event of an incursion response. This will help to avoid complex negotiations at the same time as a response occurring, saving industry costs and ensuring faster response operations.

The past year has also seen the Government release the most significant set of policy proposals on biosecurity legislation since 1993 when the current Biosecurity Act was established. There were 71 proposals for change across the scope of the Act. NZW compiled a detailed submission, focused largely on the benefits of maintaining the status quo with regards to the structure and cost-sharing arrangements of the GIA, and the current compensation provisions in the Act. NZW will continue to advocate to ensure that biosecurity remains cost effective for members and to ensure our biosecurity system mitigates the impacts of potential pests and disease as much as possible.

Over the next year, engagement with government remains a high priority for the Biosecurity team. The Government has announced a strategic review of the plant imports system and other key plant imports standards. NZW will focus on ensuring this review better enables the cost-effective importation of plant germplasm while minimising biosecurity risk.

Project Raumatatiki

In 2025, the successful delivery of Project Raumatatiki: Freshwater Farm Planning for Viticulture was one of the Environment team's key priorities. This project, funded from the Essential Freshwater Fund administered by the MfE, has focused on building an online Freshwater Farm Plan (FWFP) pilot tool to better enable members to meet their regulatory requirements to mitigate the risks of viticultural production on New Zealand's freshwater ecosystems.

The project has met its objectives and delivered high-quality educational resources for members, including webinars and industry guidelines, as well as a successful pilot of the online FWFP tool. These assets will help the industry become a world leader in efficient water use and the protection of water quality.

Alongside the project, NZW has also prioritised advocacy to increase the regulatory thresholds for properties that will require FWFPs and has worked to better enable members to meet future regulatory requirements through SWNZ. This work is focused on reducing the potential cost of these new regulations on the industry as much as possible.

Final government decisions on these matters are expected by the end of the calendar year. Once there is clarity on the extent of these regulatory requirements, advising the NZW Board on options and implementing their decisions on next steps will be a key priority for 2025/26.

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 a membership of 208 companies.

From Clive Dougall, Chair, OWNZ

“Organic wine consumption is growing worldwide, defying the global trend of declining wine sales. The most recent data sourced from BioGro NZ (September 2023) found that in the previous two years the number of New Zealand organic wineries had increased by 13%, to 116 wineries. At that time, 16% of New Zealand wineries had at least one organic label.

“Despite these positive indicators, OWNZ members have expressed concerns about the government's proposed Gene Technology Bill. OWNZ believes that the current Bill will threaten the reputation of New Zealand-produced organic wine and impose additional costs on organic producers. Our membership shares strong concerns that if genetically modified organisms are released into the supply chain, producers could face contamination risks and additional compliance costs to prove their wines are GMO-free. OWNZ continues to work with NZW to encourage policies to protect all wine producers.”

ORGANIC WINE WEEK

OWNZ EVENTS

In June 2025, over 260 delegates gathered in Marlborough for the biennial Organic and Biodynamic Winegrowing Conference. Attendees heard from experts and leading practitioners from across Aotearoa and the globe on climate change, water ecology, biodiversity, soil health, regenerative viticulture and more.

The ever-popular Organic Wine Week in September included tastings, winemaker dinners and promotions across the motu. Down to Earth, OWNZ’s vibrant annual organic trade and consumer tasting, expanded to a larger Auckland venue and launched in Wellington this year.

TE MATA ESTATE, HAWKE'S BAY. PHOTO: RICHARD BRIGGS

“The ever-popular Organic Wine Week in September included tastings, winemaker dinners and promotions across the motu."

Brand

Building and promoting a premium New Zealand Wine brand.

New Zealand Wine on the world stage

Over the past year, across key export markets for New Zealand wine, there has been a rich array of activity that has reinforced the premium positioning for New Zealand Wine, with a focus on celebrating 30 Years of SWNZ.

The standout initiative to accelerate the talkability of New Zealand Wine was the Pinot Noir New Zealand 2025 conference that took place in Christchurch in February and was met with excited anticipation after eight years had elapsed since the previous event, due to pandemic disruptions. NZW invested in bringing high-profile media and trade from the USA, UK, Canada, Australia, China, and Japan to attend the conference. In addition to attending the event, these guests participated in six New Zealand wine exploration itineraries split across nine of our New Zealand wine regions. Invited key media outlets offered a spread across titles and markets and reached a wide range of audiences and demographics, ensuring the New Zealand Wine message was shared far and wide. This hosting included Sommit™, NZW's flagship event targeting sommeliers, that takes place as part of a wider New Zealand Wine Sommelier Scholarship.

Sommit™ is a full-day masterclass and an all-encompassing celebration of the lesser-known aspects of New Zealand wine, with particular emphasis on the facets that resonate with the sommelier community. Sommit™ 2025 welcomed a targeted group of nine attendees from eight countries and was led by hosts Cameron Douglas MS and Stephen Wong MW. This year's Sommit™ continued to excite and engage a highly discerning and often challenging-to-reach sector of the trade, with the objective of landing New Zealand wine on influential wine lists in both established and growth markets.

AUSTRAIA AND NEW ZEALAND TRADE TASTING

The strength of collaboration

Aligning objectives with other 'like-minded' organisations and nurturing these partnerships to leverage mutual benefit has been of great value, as illustrated by the events NZW has collaborated on with Wine Australia over the past few years. In early 2025, NZW once again teamed up with Wine Australia to run the first combined UK and Ireland Trade Tastings. Across the three cities—Dublin, Edinburgh, and London—over 100 New Zealand producers showcased their wines, representing 10 New Zealand wine regions and 21 grape varieties and styles.

> *"Thank you does not start to show my appreciation for what can only be called the best trade trip I have ever experienced, and I am a veteran of far too many wine trips... I thought I knew a bit about New Zealand wines, I was wrong, my word these two weeks have been like a sponge, so much more to tell the consumer and hospitality trade."*
>
> – Roger Jones, Journalist, UK

PINOT NOIR NEW ZEALAND 2025

Pinot Noir New Zealand 2025

"It is by far the best wine event I have ever attended, and I've come away brimming with inspiration to share the story of NZ Pinot Noir with everyone I can reach."
– Olly Smith, Journalist, UK

Pinot Noir New Zealand 2025

February 2025 saw the return of Pinot Noir New Zealand, one of the most iconic events of the New Zealand wine industry calendar. This exceptional three-day event, held for the first time in Christchurch, provided a platform to showcase New Zealand's world-class Pinot Noir, with participating wineries creating valuable connections with leading wine media and trade as well as many global thought leaders.

"It was an extremely informative and inspiring conference with a lot of excellent speakers."

The event embraced culture and the environment across three guiding themes—Place (Tūrangawaewae), Care (Kaitiakitanga), and Time to Come (ā Mua). These themes resonated throughout the event—influencing discussions, tastings, and the broader experience—and reflected New Zealand's connection to the land, its commitment to sustainable practices, and its innovative, future-focused perspective.

Feedback from attendees was overwhelmingly positive, with many calling it the best wine conference they have attended. Comments highlight the event's exceptional programme, the quality of speakers, the culinary experiences, and the rich diversity of Pinot Noir showcased.

PINOT NOIR NEW ZEALAND 2025

11–13 February 2025
Ōtautahi Christchurch

ATTENDEES 439

SPEAKERS 40 **DOMESTIC & INTERNATIONAL**

PARTICIPATING WINERIES 79

Attending wineries covered the breadth of New Zealand—including Wairarapa, Gisborne, Marlborough, Nelson, North Canterbury, Central Otago, and Waitaki Valley—each presenting their unique expressions of Pinot Noir in regional tastings, as well as other varieties across the culinary and social programme.

NZW-HOSTED GUEST MEDIA COVERAGE

MEDIA IMPRESSIONS 69

REACH 152 **MILLION**

EQUIVALENT ADVERTISING VALUE $8.9 **MILLION**

"The gathering was a remarkable celebration of the nation's deep connection to not only the Pinot Noir grape, but also the land, the climate, and the people involved with this industry."
– Ash Pini, Journalist, Australia

YANG LU MS (CHINA), CYNDAL PETTY & LIINAA BERRY (AUSTRALIA), JENNA ISAACS (USA) AND TOM FAHEY (UK)

"I would have to say that my favourite experience was the 2025 Sommit. Led by local heavyweights Stephen Wong MW and Cameron Douglas MS, it was high-impact learning at its best... we weren't afraid to disagree on views on wines, creating a constructive and warm environment to learn from perspectives, opinions and debates."

– Liinaa Berry, Sommelier, Australia

Connecting across our network of New Zealand Government agencies has seen strong support for our activities from New Zealand Trade and Enterprise (NZTE), MFAT, MPI and the New Zealand Story Group.

In particular, NZW continues to closely work with NZTE in key and high-growth export markets to drive awareness and preference for New Zealand wine. Leading examples of this co-delivery and cost sharing include the China Wine Outlook report seminar, conducted alongside the NZW annual tasting in Shanghai, and market data sharing in the UK, Australia, Canada, and China.

Partnering with NZTE on wine sector multi-customer initiatives has also been a valuable way to expand the reach of New Zealand Wine brand messaging. A particular highlight was New Zealand being the featured region at Pinot Palooza, the three-city roadshow in Australia, enhancing New Zealand wine's visibility and premium positioning in the Australia market after years of falling participation. As a region, New Zealand had the highest spend on wine per person across the events, accounting for 24% of all wine sales.

NZTE has done an impressive job over the past year providing platforms for New Zealand wine exporters in high-growth, emerging markets that fall out of the scope of NZW's focused market strategy, such as South Korea, Japan, and Singapore. NZW was appreciative of the support NZTE provided when hosting a New Zealand Wine pavilion at Vinexpo Asia in Singapore for the first time in May 2025. Plus in Canada, NZW has partnered with NZTE to deliver impactful retail promotions and support data-driven decision-making, with the latest

BRAND ACTIVITY

The Numbers

Global PR Programme

Strengthening the premium reputation of New Zealand Wine.

The NZW Global PR Programme ensures that New Zealand Wine continues to be a vibrant, relevant participant in the global media conversation.

MEDIA IMPRESSIONS
155

REACH
1.2
BILLION

EQUIVALENT ADVERTISING VALUE
$63.4
MILLION

International Education Programme

'Influencing the influencer'

The NZW International Education Programme is a category development initiative designed to influence decision makers across on-premise, off-premise, importer and distributor, by sharing relevant information about the unique and profitable offering of New Zealand Wine.

27
EDUCATIONAL INITIATIVES

276
INDIVIDUAL WINES POURED IN EDUCATIONAL ACTIVITIES

2,150
TRADE AND MEDIA REACHED THROUGH THE EDUCATION PROGRAMME

9,480
UNIQUE VIEWS ACROSS THE NZW TRADE HUB

Intel & Insights

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

UNIQUE VIEWS ACROSS NZW INTEL & INSIGHTS DATA
6,830

Member Engagement

To support members to convey a consistent, aligned message of New Zealand Wine.

TOOLKITS AVAILABLE TO MEMBERS
6

TOTAL DOWNLOADS
3,658

INCREASE OF
19%
compared to the same six toolkits provided last financial year

initiative across 150 stores in the country's largest liquor monopoly, the Liquor Control Board of Ontario (LCBO) being an example.

Additionally, working with the Wine and Spirit Education Trust (WSET), Guildsomm, Sommeliers Australia, and Australia's Wine List of the Year Awards are all great examples of building the profile of New Zealand Wine through partnerships.

Driving member engagement

Providing our members with 'wine days' brand toolkits continues to drive engagement. The wine days celebrate our top five wine exports (e.g. Sauvignon Blanc Day, Pinot Noir Day) and the toolkits support members to tell their unique stories. This year, six wine day toolkits were provided. In comparison to last year, we saw a 19% increase in toolkit downloads.

The annual Wine Business Forum continues to attract strong support from the NZW membership, with a 19% lift on attendance versus the previous year. The 2024 event, Navigating the Beverage Superhighway, sought to inform and inspire members how to shape their businesses within a competitive evolving drinks sector. Held at Te Papa Wellington, the thought-provoking programme included international and local speakers. Topics covered included global headwinds, followed by opportunities that could give New Zealand a competitive edge including innovation, AI, and leveraging our sustainability and wine tourism credentials.

The NZW Brand team continues to forge connections with key influencers, nurture partnerships to expand opportunities, as well as work to deliver valuable market insights, to help drive awareness and preference for New Zealand Wine. Looking forward, plans to repeat another successful major event to reinforce the premium reputation of New Zealand Wine on the world stage are well underway, with Sauvignon Blanc New Zealand taking place in February 2027.

Advocacy

A trusted voice advocating for a supportive operating environment.

CREDITS PATUATHI, THOMPONS HORTICULTURE LTD, GISBORNE. PHOTO: RICHARD BRIGGS

The Advocacy team continues to engage in key international organisations for the sector, ensuring that our views are represented.

International trade

As one of the world's top 10 wine exporters, significant volatility in global markets has been a cause for concern for winegrowers. Since April 2025, new tariffs on US exports have increased costs on wine headed to that market. Further developments in August 2025 show the ongoing uncertainty of the tariff situation.

We welcomed the launch of negotiations for a free trade agreement between New Zealand and India. We have been in close contact with the Government about the wine industry's priorities. We also welcome the imminent entry into force of New Zealand's Comprehensive Economic Partnership Agreement with the UAE, which will have modest tariff benefits for wine.

The Advocacy team continues to engage in key international organisations for the sector to ensure that our views are represented, including meetings of the OIV, WWTG and FIVS. This year, the General Manager for Advocacy was elected as Vice President of the Law and Economy Commission at the OIV.

We are seeing a number of regulatory trends that may impact market access, either this year or in the near future. This includes increasing sustainability requirements (e.g. around packaging) and labelling requirements for information related to nutritional or ingredient details. Some of these regulations are generic to all food and beverage, and it can be complex to apply them to a product like wine. We continue to monitor regulations in this area, offer guidance where we can, and respond to questions from winegrowers as they arise.

The domestic regulatory framework

Excise increases:

The Government announced an excise increase from 1 July 2025 in line with CPI. Excise on a typical 750 ml bottle of wine has increased from $2.33 to $2.84 a bottle in just four years. Another excise increase is unwelcome news for our members. NZW requested a halt to any excise increases for two years as high inflation rates have meant that over the last four years the excise rate has increased by over 20 percent, impacting the sustainability of producers alongside increasing production costs.

The Government has maintained the total amount for the alcohol health levy collected from the alcohol beverage industry to reduce alcohol harm of $16.62 million, with adjustments in the levy rates to allow for a decrease in alcohol consumption. We are seeking increased transparency and engagement with industry in spending priorities to reduce the harmful consumption of alcohol in New Zealand.

Gene technology reforms:

The Government's gene technology reforms aim to modernise how New Zealand assesses gene technologies. NZW, with BRI's support, submitted and presented to the Health Select Committee on the Gene Technology Bill. Liberalisation of low-risk gene technologies could increase research opportunities to address environmental and climate challenges in the wine industry; however, it requires careful assessment of how such use could impact market access requirements and our reputation as an exporter of high value, sustainable wines. As the reforms progress, NZW will continue engaging with Government on behalf of winegrowers and will be updating its own NZW gene technology policy for future consultation with members. [This is a joint piece of work between the Advocacy and Environment teams.]

Energy labelling on its way:

We were disappointed by the decision of Food Standards Australia New Zealand (FSANZ) to mandate energy labelling on alcoholic beverages in New Zealand. FSANZ's own research indicated that this labelling change did not impact how much consumers intended to consume, but nevertheless the substantial cost of redesigning labels will have to be borne by our members. Advocacy will support members to meet the new requirements, which have a three-year transition period.

Supporting the responsible online sale and delivery of alcohol:

The sale, supply, and consumption of alcohol should be undertaken safely and responsibly, and the online sale and delivery of alcohol is an important part of this. It is important to NZW that its members are complying with their licensing requirements, whilst also behaving in a socially responsible way. To assist with this, NZW has developed a new voluntary Code of Conduct for the Responsible Online Sale and Delivery of Alcohol (the Code). The Code helps members to identify and meet their legal obligations, as well as suggesting some additional best practices which could be implemented in this rapidly evolving environment.


KINROSS, CENTRAL OTAGO. PHOTO: RICHARD BRIGGS

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

People

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

PATUATHI, THOMPONS HORTICULTURE LTD, GISBORNE. PHOTO: RICHARD BRIGGS

Workforce activities

We continue to act to ensure the industry attracts the workforce it needs and that it is an industry of choice for workers.

NZW provided feedback on potential seasonal workforce visas and changes to the Accredited Employer Work Visa (AEWV) system to ensure we maintain access to international vintage workers.

We continue to act to ensure the industry attracts the workforce it needs and that it is an industry of choice for workers.

We are a key stakeholder in Recognised Seasonal Employer (RSE) discussions with government and industry, including supporting work to resolve setting accommodation rates.

In addition, we have been monitoring the changes to vocational education to ensure access to relevant training for our New Zealand workforce.

Young Viticulturist of the Year and 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. In 2024, the Young Viticulturist of the Year was Nina Downer from Felton Road in Central Otago, and the Young Winemaker of the Year was Georgia Mehlhopt from Greystone Wines in North Canterbury. The 2025 winners will be announced at the industry celebration event in late August.

In 2025, Young Viticulturist of the Year celebrates 20 years, which is testament to the importance of this programme and all the people involved with it.

New Zealand Women in Wine (WiW)

The WiW and NZW Mentoring Programmes, run annually, continue to increase confidence and enthusiasm in our members.

The online WiW Development Series has also been supporting all our members. Specialist presenters have been helping members increase skills and knowledge on topics such as negotiation, financial planning, and balancing work and parenting.

2024 NZ Wine People Survey

NZW is committed to ensuring the sector is seen as an industry of choice, recognised as a supportive, diverse and inclusive industry, offering equal opportunities for everyone to thrive.

NZW and its members actively champion initiatives to support the workforce. The 2024 research was commissioned to understand the impacts of proactive efforts alongside the changing work landscape. We acknowledge those who took the time to contribute to the survey.

We have seen some positive changes since our last survey in 2019 but there are still areas where improvement is needed. It is encouraging that 74% of respondents want to continue working in the New Zealand wine industry. The research findings will help inform both NZW and the wider industry to encourage progress in key areas.

PHOTO: RICHARD BRIGGS

NINA DOWNER, 2024 YOUNG VITICULTURIST OF THE YEAR

PHOTO: RICHARD BRIGGS

GEORGIA MEHLHOPT, 2024 YOUNG WINEMAKER OF THE YEAR

2025 NZW Fellows

NZW Fellows are a peer-nominated group of highly respected and influential individuals whose hard work, innovation, and passion have helped to drive the success of the New Zealand wine industry. The 2025 NZW Fellows are Mark Allen, Jenny Dobson, Judy Finn, Clive Jones, Gwyn Williams, and Dr Richard Smart.

Research

Bragato Research Institute (BRI) leads quality research and innovation to enable the New Zealand wine industry to thrive.

THE BRAGATO RESEARCH INSTITUTE BREEDING VINEYARD.

This year, BRI launched a refreshed five-year research strategy that will be used to guide future investment aligned to seven research priority outcomes that have been co-developed with industry.

BRI's seventh year of operation was marked by growing momentum, deepening partnerships, and a sharper focus on delivering value to New Zealand's wine industry. Established with government funding under the Regional Research Institute Initiative, BRI was created to build capability in wine and viticulture research and development for the benefit of New Zealand's wine industry. Today, strategic collaborations continue to enable BRI to leverage industry funding to deliver on its priorities beyond what could be achieved alone.

A new research strategy

This year, BRI launched a refreshed five-year research strategy that will be used to guide future investment aligned to seven research priority outcomes that have been co-developed with industry. Each priority targets areas where research can deliver the greatest impact, and each aligns with one of BRI's four research themes: Grapevine Improvement, Vineyard Innovation, Winemaking Innovation, and Sustainable Winegrowing. All research conducted by BRI aligns with at least one of these themes, ensuring research outcomes are directly relevant and contribute to the long-term success of New Zealand's wine industry.

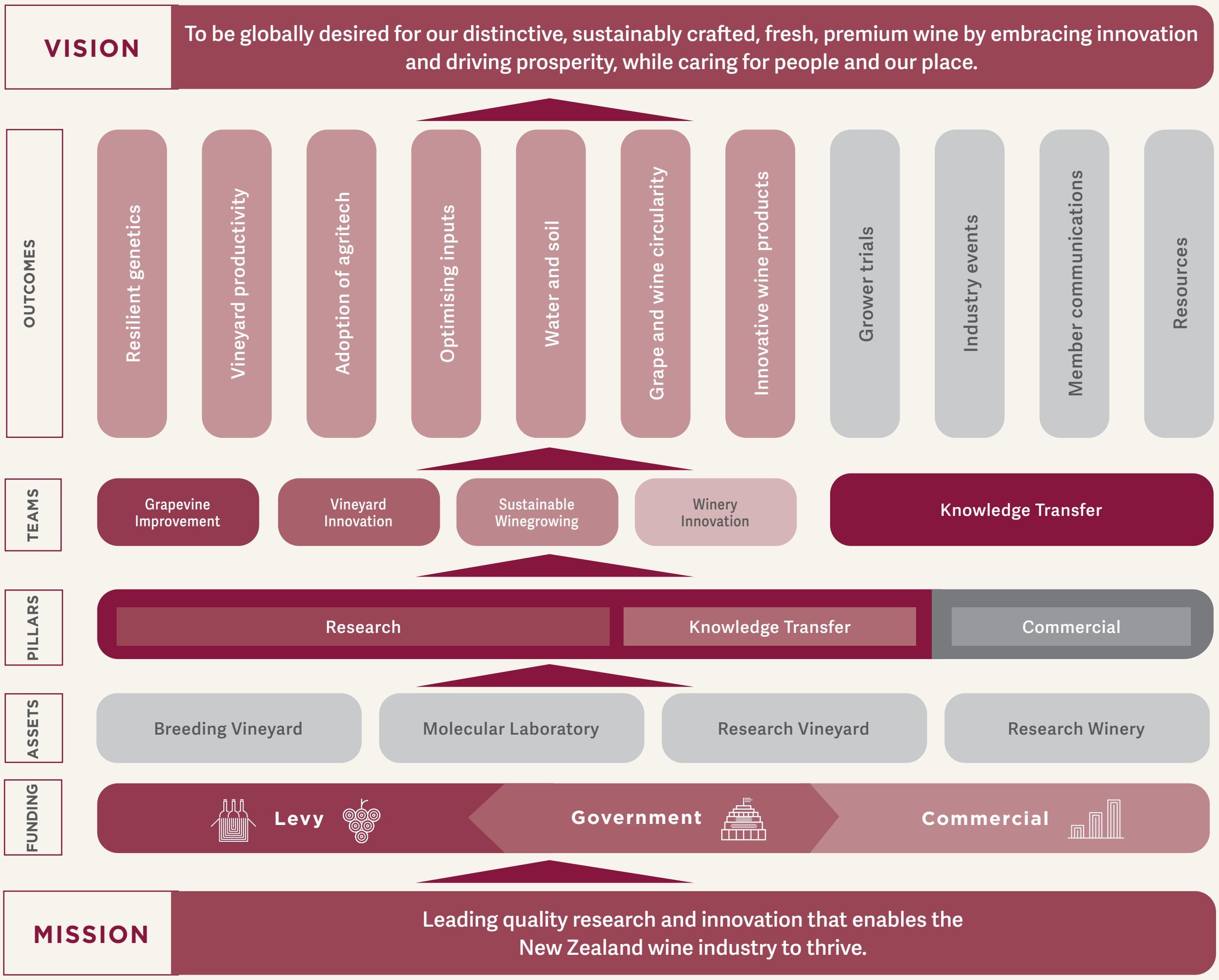
Grapevine improvement

Sauvignon Blanc 2.0

The Sauvignon Blanc 2.0 (SB2.0) programme aims to develop new Sauvignon Blanc clones that are better suited to a changing climate and the challenges New Zealand's wine industry might face going forwards. In the programme's third year, a 2.5-hectare breeding vineyard was established, and 6,000 vines, grown from tissue culture to plantlets, were planted in the ground.

Alongside the SB2.0 programme, BRI's Grapevine Improvement team has been focused on several smaller projects. One example is Rapid detection of fungicide resistance in grapevine powdery mildew in New Zealand, which aims to develop a robust and straightforward molecular diagnostic tool to screen for genetic variants associated with fungicide resistance. The team is also investigating how RNA technology can be used to effectively target grapevine leafroll virus.

Over the past year, the Grapevine Improvement team has also strengthened its global connections through a number of international collaborations, including with Bordeaux Sciences Agro (France), the Institute of



Grapevine and Wine Sciences (Spain), the United States Department of Agriculture, E & J Gallo Winery and Cornell University (USA), and Hochschule Geisenheim University (Germany). These partnerships are helping to accelerate innovation and ensure New Zealand's research remains aligned with global best practices in grapevine science.

This year, BRI's Vineyard Innovation team delivered a range of initiatives—from large-scale research projects to targeted workshops and smaller trials—all designed to support members in addressing challenges they face in the vineyard.

Case study:
Potted Vines—Trichoderma for managing drought stress

This project investigated the impact of Trichoderma application on young, grafted Sauvignon Blanc grapevines, demonstrating the potential of Trichoderma to enhance drought tolerance and water-use efficiency.

Vineyard innovation

This year, BRI's Vineyard Innovation team delivered a range of initiatives—from large-scale research projects to targeted workshops and smaller trials—all designed to support members in addressing challenges they face in the vineyard.

NGV WINTER PRUNING WORKSHOP

Next Generation Viticulture (NGV)

The seven-year NGV programme aims to help growers improve vineyard profitability through the adoption of innovative, efficient canopy systems. The programme launched in September 2024. Since then, the focus has been on developing new canopy systems and monitoring aspects of vine phenology, canopy and vine balance, and grape and wine quality.

Winemaking innovation

The BRI Research Winery continued to serve as a vital platform for winemaking innovation in FY25, enabling both industry clients and BRI-led research project teams to explore the effects of different winemaking approaches and vineyard interventions. During the 2025 vintage, the Winery processed 205 ferments, with harvest capacity utilisation reaching 91%, reflecting a strong return on winery investment for members.

Case study:

Pinot Noir clonal trial

Pinot Noir is known to be prone to mutation, allowing the production of numerous Pinot Noir clones. This project analyses 12 Pinot Noir clones with the aim of giving growers and winemakers data about each clone so they can make informed decisions for their specific site or wine style.

Case study:

UV-C light in vineyards to reduce fungicide dependence

Broad-spectrum fungicide use is on the rise, posing serious risks to biodiversity in vineyards. This project aims to provide another control option for winegrowers facing a powdery mildew problem. Based on first season observations, UV-C light application is effective at controlling powdery mildew on Sauvignon Blanc vines.

Sustainable winegrowing

This year the first Sustainability Research Strategy was co-developed with the NZW Environment team and industry groups. The Strategy acts as a bridge between the core pillars of the NZW sustainability strategy and BRI's capabilities and research strategy. Central to this in 2025 was the alignment of projects with the NZW Roadmap to Net Zero and other industry-led circularity initiatives. Through active involvement in a range of industry groups, BRI ensures its sustainability research remains closely aligned with sector needs and strategic goals.

Case study:

Carbon Calculator

The NZW Roadmap to Net Zero sets a goal for New Zealand's wine industry to reach net zero emissions by 2050. Achieving this goal will require greater understanding of diesel-use patterns so growers can prioritise their efforts. The Carbon Calculator project will develop a database of vineyard fuel use to support informed decarbonisation strategies across the industry.

Knowledge transfer

Effective knowledge transfer is essential to ensuring research delivers value to industry. This year BRI delivered events designed to share insights and drive impact for New Zealand's wine industry, including the 17th annual Grape Days which took place in Marlborough, Hawke's Bay and Central Otago, alongside several targeted workshops and webinars held across the country.

Case study:

Gene Technology Bill

BRI has drawn on the technical expertise of its Grapevine Improvement team to support members in navigating the scientific complexities of the Gene Technology Bill. This work has been focused on helping winegrowers to understand the proposed changes to New Zealand's gene technology legislation and assess their potential implications for the wine industry. Engagement activities have included member-focused webinars, as well as dedicated sessions at Grape Days 2025 and the 2024 Research & Innovation Forum.

New research

In March, following BRI's strategy refresh, BRI mapped current investment to identify gaps and invited researchers to submit expressions of interest to undertake new research projects that addressed those gaps. As a result, priority was given to projects that focused on new innovative wine products and improved grape and wine circularity. Six new projects were approved for funding. These projects represented a portion of the funding that was available in this round, with additional projects currently in development to ensure all knowledge gaps in BRI's priority research areas are addressed.

Knowledge Transfer

WORKSHOPS AND WEBINARS
(e.g. UV-C workshop, post-frost webinar)
385
ATTENDEES

LARGE EVENTS
(e.g. Grape Days)
716
ATTENDEES

SUPPORTED EXTERNAL EVENTS
(e.g. Wine Marlborough Winter Field Day, NZ Wine Centre Scientific Research Conference)
476
ATTENDEES

RESOURCES, REPORTS AND TECHNICAL UPDATES
(e.g. popular articles, VineFacts technical updates)
77

As BRI continues to deliver high-impact, industry-led research, foster industry collaboration, and invest in practical innovation, its focus remains firmly on the future, ensuring New Zealand's wine industry is equipped to thrive.

DR SETH LAURENSON PRESENTING AT GRAPE DAYS 2025

As BRI continues to deliver high-impact industry-led research, foster industry collaboration, and invest in practical innovation, its focus remains firmly on the future, ensuring New Zealand's wine industry is equipped to thrive.

Financials

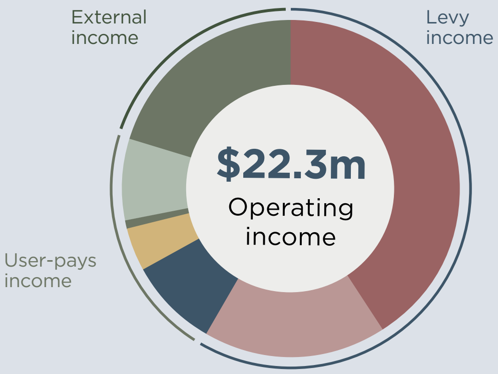
Statement of comprehensive revenue and expense by revenue stream.

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%

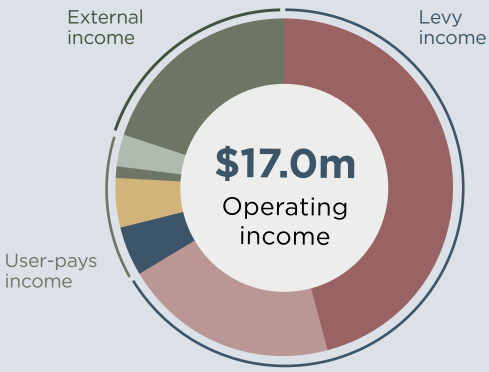
See page 30 for detail.

Year ended 30 June, 2024

OPERATING INCOME

$17.0m

↓22%



- Wine levy $7.8m ↓3%
- Grape levy $3.5m ↓23%
- Marketing user pays $0.8m ↑40%
- SWNZ $0.8m ↑11%
- Young Vit & Winemaker $0.2m ↓11%
- Other $0.5m ↓11%
- External funding for research $3.4m ↓52%

EXPENDITURE

$19.1m

↓3%

See page 31 for detail.

Commodity levy income and non-levy income is 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	$1.8m ↓22%	$5.6m ↑46%
International brand activity Global PR and media outreach International event programme	$2.2m ↓3%	$0.6m 0%
Administration General, governance costs	$2.5m ↓24%	$0.8m ↓1%
Events in New Zealand Altogether Unique, Pinot Noir NZ 2025 Hosted International Guests	$0.5m ↑96%	$1.1m ↑462%
Environment SWNZ programme Spray Schedule FWFP tool and pilot	$0.6m ↓24%	$2.2m ↑148%
Member information VineFacts, website, Grape Days	$1.2m ↓3%	$0.04m 0%
Regions	$1.1m ↓21%	
International trade (Advocacy)	$0.3m ↓13%	
Domestic trade (Advocacy) 20 domestic submissions to government	$0.5m ↑8%	
People Women in Wine Labour strategy and RSE Young Viticulturist and Young Winemaker competitions	$0.2m ↓30%	$0.2m ↓5%
Biosecurity 4 submissions to government GIA partnerships	$0.4m ↑15%	
TOTAL	11.3m ↓13%	$10.5m ↑61%
TOTAL EXPENDITURE		$21.8m ↑12%

Financials

Statement of comprehensive revenue and expense by revenue stream.

Year ended 30 June, 2025

	Wine levy	Grape levy	Total levy stream	User-pays & other	NZW Inc. 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 Karearea, Pinot Noir 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.

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, 2024				
	Wine levy	Grape levy	Total levy stream	User-pays & other	NZW Inc. consol 2024 totals
REVENUE					
Non-exchange revenue					
Membership levies	7,830,041	3,467,418	**11,297,459**		11,297,459
Exchange revenue					
Research funding				3,354,273	3,354,273
User-pays activity income				2,018,471	2,018,471
Other income				317,459	317,459
TOTAL REVENUE	**7,830,041**	**3,467,418**	**11,297,459**	**5,690,203**	**16,987,662**
LESS EXPENDITURE					
Operating expenditure					
Administration	930,695	412,144	**1,342,839**	727,517	2,070,356
Advocacy	316,495	140,155	**456,650**	333,947	790,597
Audit fees	51,704	22,896	**74,600**	16,013	90,613
Brand	1,248,592	552,920	**1,801,513**	71,322	1,872,834
Communication	103,836	45,982	**149,818**	4,310	154,128
Environment	457,974	202,807	**660,781**		660,781
Personnel	2,469,044	1,093,379	**3,562,423**	1,518,659	5,081,082
Regional funding	892,192	395,094	**1,287,286**		1,287,286
Research	1,653,897	732,404	**2,386,300**	1,583,642	3,969,942
Sustainable Winegrowing support	150,366	66,588	**216,95**		216,954
Special projects (Project Karearea, Pinot Noir 2025)	656,918	290,907	**947,825**		947,825
User-pays activity expenditure				1,933,135	1,933,135
TOTAL OPERATING EXPENDITURE	**8,931,713**	**3,955,277**	**12,886,990**	**6,188,544**	**19,075,534**
OPERATING SURPLUS / (DEFICIT)	(1,101,672)	(487,859)	**(1,589,531)**	(498,341)	(2,087,872)
OTHER EXPENDITURE Depreciation	42,989	19,037	**62,026**	346,350	408,376
TOTAL OTHER EXPENDITURE	42,989	19,037	**62,026**	346,350	408,376
SURPLUS / (DEFICIT) BEFORE TAXATION	(1,144,661)	(506,896)	**(1,651,558)**	(844,690)	(2,496,248)
Income tax expense	11,580	5,128	**16,708**		16,708
NET SURPLUS / (DEFICIT) AFTER TAXATION	(1,156,241)	(512,024)	**(1,668,266)**	(844,690)	(2,512,956)
OTHER COMPREHENSIVE REVENUE & EXPENSE Cashflow hedge reserve				3,104	3,104
TOTAL COMPREHENSIVE REVENUE & EXPENSE	**(1,156,241)**	**(512,024)**	**(1,668,266)**	**(841,586)**	**(2,509,852)**

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

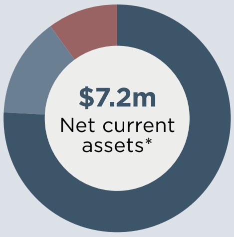
Financials

Statement of financial position

2025

ASSETS/RESERVES

$12.2m



*Current assets less total liabilities.

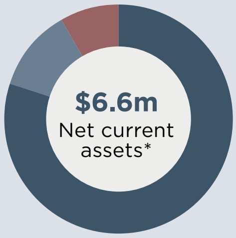
Year ended 30 June, 2025

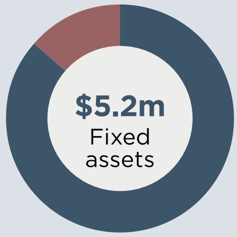
	Wine levy	Grape levy	Total levy stream	User-pays & other	NZW Inc. consol 2025 totals
ASSETS					
Cash and bank balances	1,076,703	3,486,610	**4,563,313**	4,337,402	8,900,716
Accounts receivable and prepayments	1,690,421	1,149,065	**2,839,486**	1,169,276	4,008,762
TOTAL CURRENT ASSETS	**2,767,124**	**4,635,675**	**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**

2024

ASSETS / RESERVES

$11.8m





*Current assets less total liabilities.

Year ended 30 June, 2024

	Wine levy	Grape levy	Total levy stream	User-pays & other	NZW Inc. consol 2024 totals
ASSETS					
Cash and bank balances	341,307	2,067,173	**2,408,480**	4,674,899	7,083,379
Accounts receivable and prepayments	1,591,096	1,757,598	**3,348,694**	1,122,400	4,471,094
TOTAL CURRENT ASSETS	**1,932,403**	**3,824,771**	**5,757,174**	**5,797,299**	**11,554,473**
Fixed assets	84,385	37,368	**121,753**	5,085,056	5,206,809
Intangible assets	615	272	**888**	4,614	5,502
Foreign currency contracts	2,336	1,034	**3,370**	207	3,577
TOTAL NON-CURRENT ASSETS	**87,336**	**38,675**	**126,011**	**5,089,877**	**5,215,888**
TOTAL ASSETS	**2,019,739**	**3,863,446**	**5,883,185**	**10,887,176**	**16,770,361**
LIABILITIES					
Accounts payable and accruals	900,232	382,005	**1,282,237**	3,316,645	4,598,882
Event balances				382,061	382,061
TOTAL CURRENT LIABILITIES	**900,232**	**382,005**	**1,282,237**	**3,698,706**	**4,980,943**
NON-CURRENT LIABILITIES					
Accounts payable and accruals	14,823	6,564	**21,387**		21,387
TOTAL NON-CURRENT LIABILITIES	14,823	6,564	**21,387**		21,387
TOTAL LIABILITIES	915,055	388,569	**1,303,624**	3,698,706	**5,002,330**
NET ASSETS	**1,104,684**	**3,474,877**	**4,579,561**	**7,188,470**	**11,768,031**
REPRESENTED BY EQUITY					
Retained earnings - levy activity	1,104,683	3,474,877	**4,579,560**	6,706,231	11,285,791
User-pays reserves				500,221	500,221
Cashflow hedge reserve				(17,982)	(17,982)
TOTAL EQUITY	**1,104,683**	**3,474,877**	**4,579,560**	**7,188,470**	**11,768,030**

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.

Vision

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

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

Consultation with members on options for changing NZW governance, representation, and levies.

13 MEETINGS & WEBINARS HELD WITH MEMBERS

Advocacy

A trusted voice advocating for a supportive operating environment.

19 RESPONDING TO GOVERNMENT PROPOSALS
Submissions to government on policies impacting the industry. (2024 - 1 9)

14 ADVICE TO MEMBERS WEBINARS HELD
Topics included Labelling and Winemaking Practices and simulated recalls. (2024 - 9)

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
33 ENTRANTS (2024 - 40)	20 ENTRANTS (2024 - 20)	7 MENTEES, 7 MENTORS (2024 - 11 mentees, 11 mentors)	10 MENTEES, 10 MENTORS (2024 - 9 mentees, 9 mentors)

Brand

Building and promoting a premium New Zealand Wine brand.

PINOT NOIR NZ 2025
Deliver a world-class event with key influencers attending.

SATISFACTION RATING IN POST-EVENT SURVEY

100% of participating wineries surveyed reviewed as 'good' or 'excellent'

Hosted international guest satisfaction
92% of respondents rated their trip 4 or 5 stars

INTEL & INSIGHTS
Deliver relevant intel & insights through a programme of activity.

WINE BUSINESS FORUM SATISFACTION RATING

92% of attendees surveyed rate the event 8 or higher out of 10 overall

4,824 Unique number of views of webpages (2024 - 3,237)

For the year ended 30 June 2025

Environment

Demonstrating our commitment to a sustainable future.

NZW IS A SIGNATORY TO **4** GIA AGREEMENTS* (2024 - 4)

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

Deliver a pilot FWFP tool and education programme for members.

3 WEBINARS HELD

38 PILOT PROGRAMME MEMBER PARTICIPANTS

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)

	2025		2024	
	LEVY	OTHER FUNDING	LEVY	OTHER FUNDING
Sustainable Winegrowing	$67	$36	$470	$244
Winemaking Innovation	$154	$55	$316	$139
Grapevine Improvement	$1,578	$1,359	$937	$1,074
Vineyard Innovation	$651	$958	$1,097	$331
Knowledge Transfer	$289	$13	$282	$3
Total	$2,739	$2,421	$3,101	$1,791

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

ACTIVE RESEARCH PROJECTS

	2025	2024
Sustainable Winegrowing	5	4
Winemaking Innovation	4	8
Grapevine Improvement	6	3
Vineyard Innovation	9	9

RESEARCH WINERY

	2025	2024
Number of ferments (based on 17L ferments)	205	242
Tank utilisation	88%	103%

KNOWLEDGE TRANSFER

Grape Days 2025

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.

564 REGISTRATIONS (2024 - 796)

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
48%	57%	54%	57%	49%
▲ 2%	▲ 7%	▼ 2%	▲ 4%	▼ 25%

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 2024 to 30 June 2025 (with comparatives presented for the full year ended 30 June 2024).

**These statistics have been audited by KPMG.*

Statistics

Summary of New Zealand wine (2016–2025)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Number of members***									1426	1412
Number of members who sell wine***	675	677	697	716	717	731	744	739	755	738
Number of members who only sell grapes***	747	726	699	692	694	732	706	681	671	674
Number of members with vineyards***	1,271	1,284	1,292	1,248	1,231	1,280	1,266	1,259	1,234	1,268
Producing area (hectares)	36,226	36,943	38,073	39,061	39,934	40,949	41,304	41,991	41,628	42,520 *
Average yield (tonnes per hectare)	12.0	10.7	11.0	10.7	11.4	9.2	12.9	11.9	9.5	12.2
Average grape price (NZ$ per tonne)	1,807	1,752	1,841	1,890	1,920	2,025	2,261	2,405	2,186	N/A
Tonnes crushed (thousands of tonnes)	436	396	419	413	457	370	532	501	395	519
Total production (millions of litres)	313.9	285.1	301.7	297.4	329.04	266.4	383.0	360.7	284.4	374.0
Domestic sales of NZ wine (millions of litres)	56.2	52.1	53.6	50.6	50.0	49.2	40.6	42.4	39.9	40.2
Consumption per capita NZ wine (litres)	12.2	11.0	10.9	10.3	10.0	9.6	7.9	8.2	7.5	7.5
Total domestic sales of all wine (millions of litres)	93.4	92.0	94.5	93.1	91.7	90.2	89.0	85.7	78.9	77.0
Consumption per capita all wines (litres)	20.2	19.5	19.2	18.9	18.3	17.7	17.4	16.6	14.9	14.4
Export volume (millions of litres)	213.4	253.0	255.0	270.4	286.5	284.9	266.1	315.8	276.2	288.8
Export value (millions of NZ$ FOB)	1,570	1,663	1,705	1,825	1,923	1,870	1,953	2,405	2,110	2,098

N/A – Not yet available
*Estimate **Earlier years' vineyard numbers can be found on the NZW website: https://www.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. Total number of members reported from 2024.

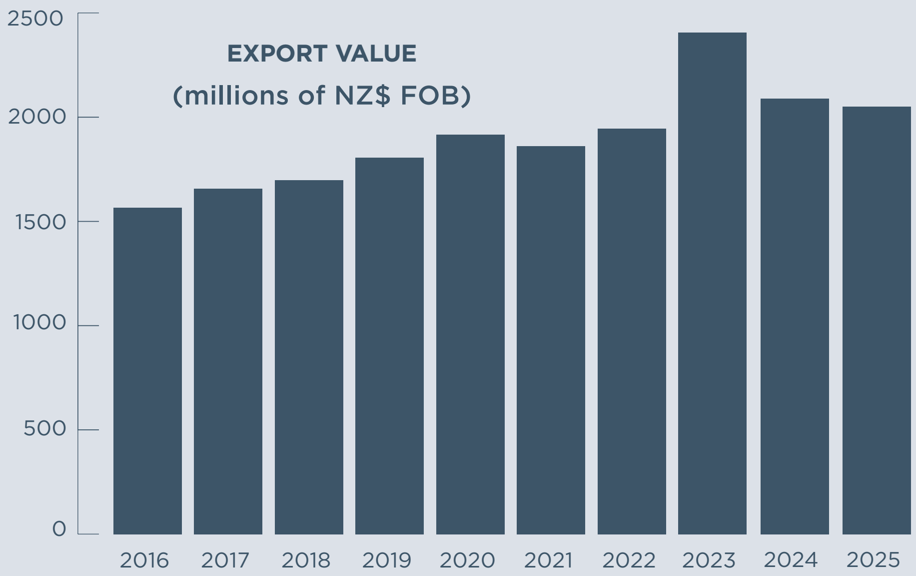
PRODUCING AREA (ha)

2016

36,226

2025

42,520*



New Zealand Winegrowers membership (2016–2025)

Number of members who sell wine by size	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Small	581	582	603	624	628	645	662	646	661	648
Medium	78	77	77	73	69	67	66	75	76	71
Large	16	18	17	19	20	19	16	18	18	19
Total	**675**	**677**	**697**	**716**	**717**	**731**	**744**	**739**	**755**	**738**

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

Number of members who sell wine by region	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Northland	15	16	17	20	20	18	17	17	16	15
Auckland	110	109	102	100	99	99	98	93	95	94
Waikato/Bay of Plenty	9	8	10	7	9	8	6	6	8	7
Gisborne	18	18	17	16	15	33	37	37	36	39
Hawke's Bay	76	79	91	98	100	104	107	106	109	102
Wairarapa	68	64	69	72	67	67	67	69	68	64
Marlborough	141	139	141	150	158	159	160	163	169	169
Nelson	36	36	38	42	38	35	37	35	34	35
North Canterbury	64	65	67	68	71	68	71	64	69	66
Central Otago	133	137	136	135	133	134	137	143	142	140
Waitaki Valley			4	4	4	3	4	3	4	5
Other areas	5	6	5	4	3	3	3	3	5	2
Total	**675**	**677**	**697**	**716**	**717**	**731**	**744**	**739**	**755**	**738**

Number of members who only sell grapes by region	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Northland*					4	4	3	5	1	0
Auckland*	5	4	3	8	5	5	5	4	6	4
Waikato/Bay of Plenty										1
Gisborne	41	36	33	31	27	14	12	12	11	13
Hawke's Bay	71	65	62	58	57	65	59	50	48	47
Wairarapa	15	17	13	14	14	19	25	18	23	19
Marlborough	534	519	510	509	514	531	518	513	485	498
Nelson	36	37	35	27	27	32	31	27	24	24
North Canterbury	14	14	9	13	10	19	15	16	23	30
Otago**	31									
Central Otago**		33	33	32	36	43	38	36	43	37
Waitaki Valley**		1	1						3	0
Other									1	1
Total	**747**	**726**	**699**	**692**	**694**	**732**	**706**	**681**	**671**	674

*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 (2016–2025)

By grape variety (ha)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*
Sauvignon Blanc	21,400	22,230	23,426	24,605	25,160	25,988	26,471	27,478	27,722	28,702
Pinot Noir	5,519	5,572	5,588	5,549	5,642	5,805	5,735	5,615	5,360	5,331
Chardonnay	3,116	3,114	3,106	3,179	3,222	3,186	3,159	3,099	2,963	2,932
Pinot Gris	2,439	2,369	2,471	2,413	2,593	2,766	2,773	2,787	2,772	2,745
Merlot	1,198	1,211	1,133	1,093	1,087	1,078	1,066	1,002	908	894
Riesling	753	721	679	572	569	620	592	576	547	549
Syrah	426	439	432	440	437	433	438	418	391	391
Cabernet Sauvignon	253	249	250	216	219	207	202	196	194	196
Gewürztraminer	242	229	221	206	217	186	190	181	164	160
Malbec	119	121	114	111	111	98	96	84	86	88
Sauvignon Gris**	113	109	105	105	105	102	103	87	87	87
Cabernet Franc	99	91	97	91	93	91	90	87	86	86
Albarino***								64	63	62
Viognier**	119	97	97	89	85	69	62	60	50	51
Other varieties	430	391	354	394	395	320	327	257	235	247
TOTAL	**36,226**	**36,943**	**38,073**	**39,061**	**39,934**	**40,323**	**41,304**	**41,991**	**41,628**	**42,520**

By region (ha)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*
Northland				73	71	75	73	74	63	68
Auckland				313	319	283	266	269	243	258
Auckland/Northland	387	387	392							
Waikato/Bay of Plenty	3	13	15	12	12	13	13	6	4	4
Gisborne	1,350	1,246	1,181	1,163	1,191	1,221	1,232	1,239	1,224	1,265
Hawke's Bay****	4,641	4,615	4,678	4,883	5,034	4,737	4,722	4,623	4,572	4,605
Wairarapa	1,005	932	969	1,030	1,039	1,089	1,083	1,081	1,013	1,122
Marlborough	24,365	25,244	26,288	27,176	27,808	28,883	29,339	29,970	29,815	30,469
Nelson	1,135	1,093	1,162	1,105	1,102	1,086	1,067	1,069	1,076	1,059
North Canterbury	1,419	1,472	1,457	1,368	1,369	1,489	1,448	1,467	1,486	1,497
Central Otago	1,880	1,886	1,873	1,875	1,930	2,029	2,013	2,115	2,058	2,106
Waitaki Valley	41	55	58	63	59	58	48	48	44	45
Other / Unknown								31	30	21
TOTAL	**36,226**	**36,943**	**38,073**	**39,061**	**39,934**	**40,962**	**41,304**	**41,991**	**41,628**	**42,520**

*Projections submitted in the 2025 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 (2016–2025)

By grape variety (tonnes)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Sauvignon Blanc	303,711	285,862	296,573	302,157	326,058	268,079	393,956	378,300	298,479	402,564
Pinot Gris	24,892	20,755	22,824	20,953	28,849	20,987	30,465	26,097	22,126	30,837
Pinot Noir	35,661	28,760	35,095	26,944	34,105	22,029	34,569	30,532	25,781	28,979
Chardonnay	29,162	26,843	26,371	25,729	27,568	23,507	29,762	22,528	19,150	22,488
Merlot	9,321	7,714	10,623	9,240	11,166	9,877	7,535	9,092	6,120	4,728
Riesling	5,937	3,880	3,776	4,776	4,510	4,407	5,024	6,001	4,125	4,571
Rose						530	4,518	3,957	1,367	2,273
Gewurztraminer	2,221	1,047	976	834	1,167	707	1,179	766	648	1,469
Syrah	1,756	1,733	2,126	2,230	2,392	2,537	2,104	2,072	1,351	1,403
Sauvignon Gris	1,182	944	1,080	1,002	880	1,178	1,161	947	672	743
Cabernet Sauvignon	1,537	974	1,169	1,076	1,210	1,156	834	1,020	682	714
Gruner Veltliner	276	253	329	347	369	275	490	546	398	284
Other Reds	677	401	456	506	522	540	526	444	375	439
Alberino			162	269	284	371	451	380	255	466
Malbec	483	697	782	741	793	535	663	656	234	430
Cabernet Franc	616	373	350	473	452	458	472	507	232	274
Semillon	466	249	385	304	292	289	263	215	176	206
Other Whites	727	824	250	232	271	144	193	128	173	269
Viognier	771	266	444	318	235	488	282	347	83	117
Pinotage	374	145	153	142	122	96	131	87	58	81
Muscat Varieties	329	450	323	200	234	33	84	27	31	46
Arneis	257	239	152	91	162	91	86	12	29	22
All Hybrids									9	0
SURVEY TOTAL	**420,356**	**382,409**	**404,399**	**398,564**	**441,640**	**358,316**	**514,749**	**484,662**	**382,554**	**503,403**
INDUSTRY TOTAL*	**436,000**	**396,000**	**419,000**	**413,000**	**457,000**	**370,000**	**532,000**	**501,000**	**395,000**	**519,000**

By region (tonnes)	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Northland	92	121	113	319	269	248	195	182	159	223
Auckland	1,267	934	787	1,585	1,249	1,239	1,343	709	613	890
Gisborne	15,944	16,337	13,000	16,238	18,959	17,450	19,334	10,967	8,235	12,679
Hawke's Bay	42,958	33,679	41,061	37,173	43,247	41,138	40,172	38,409	24,143	35,417
Wairarapa	5,049	3,822	4,592	4,390	4,472	3,131	5,363	5,528	4,625	7,597
Marlborough	323,290	302,396	313,038	305,467	343,036	269,521	414,649	393,865	312,812	410,291
Nelson	10,028	8,540	9,120	12,370	11,572	7,804	10,867	11,472	11,593	12,166
North Canterbury	12,170	8,240	11,157	8,534	9,861	7,291	9,779	11,090	8,216	15,019
Central Otago	9,177	8,324	11,358	11,868	8,515	10,324	12,575	11,995	11,519	8,717
Waitaki Valley			170	41	114	23	188	210	254	283
Other**	381	16	3	579	347	147	286	236	384	121
SURVEY TOTAL	**420,356**	**382,409**	**404,399**	**398,564**	**441,640**	**358,316**	**514,749**	**484,662**	**382,554**	**503,403**
INDUSTRY TOTAL*	**436,000**	**396,000**	**419,000**	**413,000**	**457,000**	**370,000**	**532,000**	**501,000**	**395,000**	**519,000**

*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.

**Waikato/Bay of Plenty reported under Other.

Source: New Zealand Winegrowers Annual Vintage Surveys

Statistics

New Zealand wine exports (2016–2025)

		2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
United States of America	L	61.636	72.929	72.701	76.234	82.598	80.252	93.152	107.722	97.024	99.237
	NZ$	$460.600	$517.258	$521.738	$557.000	$622.150	$589.121	$694.116	$870.505	$787.562	$761.714
United Kingdom	L	58.936	74.638	74.435	82.728	82.448	80.005	67.518	79.494	69.209	73.156
	NZ$	$381.809	$389.272	$386.740	$446.584	$464.092	$448.864	$434.160	$537.078	$440.823	$409.407
Australia	L	52.960	59.672	56.059	56.335	61.852	65.819	57.397	69.504	57.204	53.075
	NZ$	$361.677	$371.099	$366.997	$367.722	$365.083	$379.836	$365.881	$443.726	$370.579	$329.658
Canada	L	10.612	11.388	12.776	12.412	12.278	11.036	12.917	12.900	12.791	15.243
	NZ$	$107.372	$107.434	$127.933	$130.133	$135.961	$112.725	$141.355	$146.144	$145.965	$176.442
China	L	2.028	2.270	2.520	2.525	2.002	2.088	2.613	2.743	2.762	4.272
	NZ$	$27.593	$31.758	$37.385	$39.177	$26.698	$28.017	$36.426	$36.335	$38.224	$56.202
Germany	L	2.667	1.728	1.685	8.413	14.021	13.503	7.030	12.223	9.283	11.461
	NZ$	$14.501	$10.740	$9.061	$44.917	$66.384	$56.854	$36.354	$71.137	$47.051	$54.025
Ireland	L	2.888	2.986	3.448	3.020	3.243	3.578	3.570	3.940	3.939	3.989
	NZ$	$21.309	$21.658	$27.183	$25.874	$27.011	$33.421	$33.003	$38.236	$40.151	$41.652
Singapore	L	1.567	1.306	1.338	1.314	1.148	1.148	1.001	1.233	1.340	1.269
	NZ$	$20.570	$18.596	$19.165	$18.884	$16.526	$16.912	$17.129	$23.669	$24.565	$24.823
Netherlands	L	6.801	8.203	9.322	4.767	3.707	3.102	2.734	2.834	3.258	2.148
	NZ$	$44.480	$45.439	$50.853	$28.655	$26.149	$24.095	$23.485	$24.724	$26.300	$20.440
Hong Kong	L	1.283	1.353	1.178	1.067	1.070	1.337	0.968	0.940	0.785	0.841
	NZ$	$17.333	$18.553	$15.671	$13.337	$14.112	$17.868	$14.586	$15.110	$12.055	$18.944
Japan	L	1.150	1.273	1.225	1.342	1.272	1.143	1.324	1.447	1.233	1.373
	NZ$	$13.796	$14.565	$17.047	$15.003	$14.873	$12.299	$14.954	$17.906	$16.123	$17.088
Denmark	L	0.942	1.252	1.322	1.362	1.381	1.553	1.790	1.791	1.410	1.477
	NZ$	$7.182	$8.368	$8.594	$8.897	$8.719	$9.769	$12.177	$13.102	$10.692	$11.734
Sweden	L	1.843	1.779	1.521	1.631	1.801	1.167	1.015	0.708	0.684	0.928
	NZ$	$15.276	$14.208	$12.903	$13.250	$15.173	$9.853	$8.861	$7.033	$6.626	$8.733
Norway	L	0.384	0.320	0.316	0.550	0.605	0.998	0.876	0.561	0.497	0.607
	NZ$	$2.511	$2.508	$2.648	$3.569	$3.946	$5.969	$5.792	$4.184	$3.452	$4.568
Finland	L	0.258	0.248	0.261	0.314	0.295	0.315	0.283	0.157	0.247	0.217
	NZ$	$2.388	$2.004	$2.340	$2.809	$2.477	$2.824	$2.771	$1.471	$2.444	$2.086
Others	L	7.516	11.618	14.979	16.351	16.740	17.901	11.896	17.630	14.562	19.478
	NZ$	$70.938	$89.507	$101.377	$109.304	$113.339	$121.748	$112.323	$154.615	$137.812	$160.804
TOTAL	**L**	**213.371**	**252.962**	**255.093**	**270.364**	**286.461**	**284.942**	**266.081**	**315.828**	**276.227**	**288.772**
	NZ$	**1,569.515**	**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**

All litre and NZ$ figures are in millions.

Source: Stats NZ

New Zealand wine exports by market (12 months to June 2025)

		White 750ml	White other	White total	Red 750ml	Red other	Red total	Sparkling	Fortified	Total
United States of America	L	54.812	43.141	97.953	1.073	62.779	1.135	0.147	0.001	**99.237**
	NZ$	566.389	171.987	738.376	19.296	0.932	20.228	3.102	0.008	**761.714**
	$/L	$10.33	$3.99	$7.54	$17.99	$14.85	$17.81	$21.09	$10.63	**$7.68**
United Kingdom	L	21.830	48.232	70.062	1.668	1.313	2.981	0.112		**73.156**
	NZ$	183.097	195.492	378.589	22.459	6.895	29.354	1.465		**409.407**
	$/L	$8.39	$4.05	$5.40	$13.46	$5.25	$9.85	$13.02		**$5.60**
Australia	L	11.925	36.406	48.331	2.899	1.479	4.378	0.367		**53.075**
	NZ$	114.955	153.425	268.380	46.869	8.529	55.398	5.880		**329.658**
	$/L	$9.64	$4.21	$5.55	$16.17	$5.77	$12.65	$16.03	$211.00	**$6.21**
Canada	L	12.426	1.822	14.247	0.932	0.030	0.962	0.034		**15.243**
	NZ$	152.093	9.820	161.914	13.943	0.083	14.025	0.502		**176.442**
	$/L	$12.24	$5.39	$11.36	$14.97	$2.75	$14.59	$14.65		**$11.57**
China	L	3.589	0.178	3.767	0.495	0.001	0.496	0.007	0.001	**4.272**
	NZ$	45.590	0.400	45.990	9.965	0.065	10.029	0.165	0.017	**56.202**
	$/L	$12.70	$2.24	$12.21	$20.14	$89.81	$20.24	$22.13	$12.94	**$13.16**
Germany	L	0.758	10.267	11.025	0.059	0.376	0.435			**11.461**
	NZ$	6.801	44.769	51.570	0.984	1.465	2.449	0.005		**54.025**
	$/L	$8.97	$4.36	$4.68	$16.73	$3.89	$5.63	$15.82		**$4.71**
Ireland	L	3.785	0.000	3.785	0.172		0.172	0.033		**3.989**
	NZ$	39.045	0.000	39.045	2.166		2.166	0.440		**41.652**
	$/L	$10.32	$0.00	$10.32	$12.63		$12.63	$13.48		**$10.44**
Singapore	L	1.035	0.004	1.039	0.203	0.001	0.204	0.027		**1.269**
	NZ$	19.095	0.090	19.185	4.913	0.024	4.936	0.700	0.001	**24.823**
	$/L	$18.46	$22.88	$18.47	$24.23	$25.85	$24.23	$25.97	$18.11	**$19.56**
Netherlands	L	1.842	0.216	2.058	0.079	0.001	0.080	0.010		**2.148**
	NZ$	17.900	1.030	18.931	1.394	0.011	1.405	0.104		**20.440**
	$/L	$9.72	$4.77	$9.20	$17.58	$21.07	$17.61	$10.69		**$9.52**
Hong Kong	L	0.694	0.014	0.708	0.106	0.005	0.111	0.022		**0.841**
	NZ$	9.872	0.369	10.241	7.339	0.831	8.170	0.531	0.001	**18.944**
	$/L	$14.22	$26.00	$14.46	$69.19	$156.74	$73.36	$24.49	$12.86	**$22.52**
Japan	L	0.813	0.242	1.055	0.279	0.003	0.281	0.036		**1.373**
	NZ$	9.650	1.339	10.989	5.556	0.048	5.604	0.494		**17.088**
	$/L	$11.86	$5.53	$10.41	$19.95	$17.34	$19.92	$13.80		**$12.45**
Denmark	L	1.086	0.312	1.398	0.079		0.079			**1.477**
	NZ$	9.341	1.267	10.608	1.125		1.125	0.002		**11.734**
	$/L	$8.60	$4.06	$7.59	$14.22		$14.22	$17.33		**$7.94**
Sweden	L	0.418	0.239	0.657	0.240		0.241	0.031		**0.928**
	NZ$	4.073	1.197	5.270	3.144	0.005	3.148	0.315		**8.733**
	$/L	$9.74	$5.02	$8.03	$13.08	$10.01	$13.07	$10.22		**$9.41**
Norway	L	0.264	0.245	0.509	0.026	0.072	0.098			**0.607**
	NZ$	2.631	1.056	3.687	0.641	0.240	0.881			**4.568**
	$/L	$9.96	$4.31	$7.24	$25.07	$3.33	$9.03			**$7.53**
Finland	L	0.077	0.046	0.123	0.008	0.001	0.009	0.085		**0.217**
	NZ$	0.696	0.406	1.102	0.113	0.016	0.129	0.855		**2.086**
	$/L	$9.04	$8.76	$8.93	$14.21	$15.52	$14.36	$10.04		**$9.59**
Others	L	11.020	7.400	18.420	0.808	0.077	0.886	0.172	0.001	**19.478**
	NZ$	117.493	27.203	144.696	13.169	0.613	13.782	2.303	0.022	**160.804**
	$/L	$10.66	$3.68	$7.86	$16.29	$7.91	$15.56	$13.39	$27.86	**$8.26**
TOTAL	**L**	**126.375**	**148.764**	**275.138**	**9.125**	**3.422**	**12.547**	**1.083**	**0.003**	**288.772**
	NZ$	**1,298.723**	**609.851**	**1,908.574**	**153.076**	**19.755**	**172.831**	**16.864**	**0.049**	**2,098.318**
	$/L	**10.28**	**4.10**	**6.94**	**16.78**	**5.77**	**13.77**	**15.57**	**16.46**	**7.27**

All litre and NZ$ figures are in millions.

Source: Stats NZ (data subject to confirmation)

Statistics

New Zealand wine exports by variety (2016–2025)

Variety	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Sauvignon Blanc	181.944	217.890	220.065	231.194	249.445	242.876	228.479	279.171	247.211	251.134
Pinot Gris	4.713	7.151	7.740	8.678	9.207	10.671	8.953	10.310	8.881	9.353
Pinot Noir	12.171	12.510	13.171	12.331	10.282	10.868	10.469	9.165	8.492	8.365
Rosé	0.942	2.389	3.656	5.195	5.592	7.996	5.827	4.254	3.599	2.618
Chardonnay	6.063	6.172	4.766	5.088	4.649	4.914	4.883	4.148	3.781	3.721
Sparkling	1.412	1.088	1.167	1.150	1.366	3.272	2.216	2.716	2.316	1.687
Merlot	1.906	2.250	2.060	2.769	1.456	1.641	1.744	1.581	1.708	1.531
Riesling	0.150	1.099	0.962	1.047	1.184	1.089	0.898	0.933	0.962	1.164
Generic White	0.380	0.085	0.120	0.126	0.077	0.533	0.639	0.395	0.393	0.455
Cabernet or Merlot Blend	0.836	0.972	0.798	0.810	0.436	0.453	0.378	0.283	0.245	0.093
Other White Varietals	0.341	0.453	0.420	0.235	0.254	0.217	0.278	0.227	0.196	0.783
Syrah	1.065	0.283	0.375	0.346	0.273	0.236	0.355	0.201	0.181	0.116
Gewürztraminer	0.026	0.182	0.150	0.148	0.135	0.119	0.085	0.087	0.079	0.099
Generic Red	0.087	0.126	0.013	0.008	0.042	0.032	0.061	0.065	0.043	0.068
Other Red Varietals	0.048	0.128	0.064	0.085	0.047	0.074	0.066	0.053	0.051	0.038
Cabernet Sauvignon	0.013	0.011	0.023	0.011	0.019	0.020	0.047	0.029	0.015	0.024
Sauvignon Blend	0.013	0.135	0.102	0.018	0.009	0.013	0.027	0.026	0.008	0.002
Sparkling Sauvignon	0.183	0.059	0.101	0.042	0.056	0.069	0.052	0.022	0.015	0.017
Chenin Blanc	0.028	0.008	0.009	0.011	0.010	0.016	0.019	0.021	0.020	0.011
Chardonnay Blend	0.132	0.007	0.008	0.010	0.013	0.028	0.023	0.019	0.014	0.004
Sweet Wines	0.134	0.051	0.032	0.024	0.021	0.019	0.018	0.012	0.008	0.004
Fortified	0.011	0.001		0.002			0.001			
Semillon		0.051							0.0003	0.0008
Syrah Malbec Viognier									0.0005	
Unidentified†										0.002
TOTAL*	**212.594**	**253.099**	**255.802**	**269.329**	**284.574**	**285.156**	**265.517**	**313.719**	**278.219**	**281.288**

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

Note: All figures are in millions of litres.

Source: MPI

Wine imports into New Zealand (2016–2025)

By country of origin	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Australia	28.715	28.517	31.527	32.118	29.795	27.427	33.566	31.609	28.290	26.602
Chile	1.842	2.397	1.606	1.522	1.943	2.166	0.825	1.134	3.097	2.874
France	2.869	2.807	2.762	3.069	2.807	3.475	4.154	3.536	2.998	2.787
Italy	1.308	1.381	1.786	1.870	2.362	2.539	3.148	2.666	2.129	2.444
Spain	0.578	0.716	0.557	0.654	0.955	0.692	0.807	0.554	0.431	0.454
South Africa	1.086	1.492	1.370	1.406	0.615	2.001	3.122	2.437	0.912	0.413
United States of America	0.136	0.207	0.259	0.226	0.449	0.743	0.503	0.443	0.450	0.411
Argentina	0.212	0.223	0.265	0.917	2.084	1.001	0.353	0.218	0.269	0.223
Others	0.467	1.751	0.758	0.685	0.608	1.014	0.692	0.671	0.472	0.641
TOTAL	**37.212**	**39.935**	**40.881**	**42.466**	**41.618**	**41.059**	**47.170**	**43.268**	**39.048**	**36.849**

By product type	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
White	14.088	18.206	21.525	21.237	20.603	18.935	21.255	21.339	17.991	16.381
Red	19.070	17.579	15.035	16.281	16.267	16.686	18.815	15.553	14.710	14.126
Sparkling	2.632	2.651	2.904	3.317	3.415	3.839	5.188	4.744	4.863	5.130
Champagne	1.364	1.397	1.371	1.567	1.288	1.544	1.858	1.580	1.444	1.172
Fortified	0.036	0.076	0.044	0.064	0.045	0.054	0.054	0.052	0.392	0.041
TOTAL	**37.190**	**39.909**	**40.879**	**42.466**	**41.618**	**41.059**	**47.170**	**43.268**	**39.048**	**36.849**

Country of origin		White	Red	Sparkling	Champagne	Fortified	Total
Australia	NZ$	31.421	63.220	23.421		2.147	120.210
	L	12.888	10.509	3.188		0.018	26.602
France	NZ$	4.565	18.077	1.264	48.526	0.056	72.489
	L	0.201	1.284	0.130	1.172		2.787
Italy	NZ$	1.567	6.136	16.154		0.083	23.941
	L	0.161	0.633	1.648		0.001	2.444
Chile	NZ$	3.093	1.447	0.004			4.544
	L	2.102	0.772				2.874
Spain	NZ$	0.390	2.673	0.588		0.387	4.039
	L	0.035	0.351	0.064		0.004	0.454
Argentina	NZ$	0.062	1.365				1.427
	L	0.026	0.197				0.223
South Africa	NZ$	0.549	0.782	0.066		0.007	1.405
	L	0.284	0.121	0.007			0.413
United States of America	NZ$	3.586	1.442			0.002	5.030
	L	0.331	0.080				0.411
Others	NZ$	1.052	1.543	0.724		2.837	6.155
	L	0.354	0.177	0.093		0.017	0.641
TOTAL	**NZ$**	**46.287**	**96.685**	**42.222**	**48.526**	**5.520**	**239.239**
	L	**16.381**	**14.126**	**5.130**	**1.172**	**0.041**	**36.849**

All litre and NZ$ figures are in millions.

Source: Wine Export Certification Services

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†*Kevin Mapson resigned from the NZW Board effective 18 June 2025. A by-election resulted in Jim White, Cloudy Bay, joining the NZW Board effective 28 July 2025.*

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