NEW ZEALAND WINE

PURE DISCOVERY

ANNUAL REPORT 2012

NEW ZEALAND WINEGROWERS' VISION

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

OUR MISSION

TO CREATE VALUE FOR OUR MEMBERS

OUR PURPOSE

1. TO PROTECT THE COMPETITIVE POSITION OF WINE FROM NEW ZEALAND

2. TO SUPPORT THE PROFITABLE GROWTH OF WINE FROM NEW ZEALAND

OUR ACTIVITIES

ADVOCACY
RESEARCH
SUSTAINABILITY
MARKETING

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FRONT COVER:

Maori whakairo (carving) was not only a source of identity and a record of events, it was also used in decoration. The presence of a beautifully crafted work, that takes what nature offers and improves it, can augment any experience. Much the way a glass of beautifully balanced New Zealand wine can augment any dish—from the lightest to the most lavish.

CHAIR'S REPORT

"WHAT PATH SHOULD THE NEW ZEALAND WINE INDUSTRY TAKE TO ENSURE ITS FUTURE SUCCESS?"

New Zealand must continue to focus on its competitive advantage in premium wine. That competitive advantage has survived oversupply intact and rich opportunities still exist for premium New Zealand wine in both established and developing markets; but the industry must guard against strategic threats and operating weaknesses.

"WHAT ROLE SHOULD NEW ZEALAND WINEGROWERS PLAY IN THAT FUTURE?"

New Zealand Winegrowers' priority role is to protect the industry's competitive advantage from threats and weaknesses. Its secondary role is to support profitable growth.

These are the headline findings of the major Strategic Review presented by PricewaterhouseCoopers to New Zealand Winegrowers in late 2011.

It may seem obvious to state that the future of New Zealand wine depends on its reputation for premium products. But after several years during which the wine industry has been pushed and pulled in different directions, it is invaluable to have that objectively and rigorously re-affirmed.

Beyond the headlines, the Strategic Review provided fact-based reassurance that the reputation of New Zealand wine remains strong and identified the markets where New Zealand wine can prosper. It also delivered the national body with a clear blueprint for its on-going role.

Fundamentally, the New Zealand wine industry and its national body are on the right track. There are risks to be guarded against and some activities need to be re-focussed. Action needs to be taken to position the industry to take best advantage of new opportunities in the future.

While there is much to be accomplished the goal is clear: to make New Zealand renowned around the world for its exceptional wines.

WHILE THERE IS MUCH TO BE ACCOMPLISHED THE GOAL IS CLEAR: TO MAKE NEW ZEALAND RENOWNED AROUND THE WORLD FOR ITS EXCEPTIONAL WINES

DEMAND KEEPS BUILDING

Globally consumers continue to respond to the vibrant, distinctive qualities of New Zealand wines and our compelling brand propositions. Demand for New Zealand wine has continued to build in the face of difficult international market conditions. In the past year, international sales reached a record value ($1.18 billion, +8% on last year) and volume (178.9 million litres, +16%).

Despite accounting for less than 1% of global wine production, New Zealand is now the world's 10th largest exporter by value and 11th exporter by volume. New Zealand is second only to France in terms of the average price at which its wines are sold. In terms of economic contribution to our nation's economic prosperity, wine is now New Zealand's 8th most valuable export sector.

Bottled wine continues to make up the core of New Zealand wine exports with packaged shipments accounting for nearly $1 billion in export earnings. The volume of bottled wine exported this year is greater than the total of all wine sales at home or abroad as recently as 2006.

Bulk wine exports have grown at an even faster rate in line with global trends. Unpackaged wine accounts for 35% of all New Zealand wine shipped abroad – up from 31% last year. But unpackaged shipments have slowed noticeably in recent months and are expected to reduce significantly over the coming year.

Australia is New Zealand's premier market for wine. Exports to our Trans-Tasman neighbour now total $380 million; 32% of total export value. Bottled exports have been the major driver of growth in the past year.

The United Kingdom imports a greater volume of New Zealand wine than Australia but value is lower ($284 million) due to the weak pound and large proportion of bulk wine exports. Bulk wine has now become the norm for popular premium wine imports from all countries into the UK. Despite this, New Zealand has maintained its high average price in the UK (£6.33 per bottle).

The market in the USA continues to perform strongly for New Zealand wine. Exports to the USA now exceed $250 million, and the Strategic Review identified the major opportunities in this market. There have been growing volumes of bulk wine dispatched to this market in the past year, but a majority of these shipments are destined for producer-owned rather than retailer-owned brands.

Significant opportunities continue to be developed beyond the top tier of markets. Exports to Canada lifted 20% in the past year to over $70 million. The China opportunity has been identified by both PwC and NZTE as a significant one for the sector. This year there was another step forward with exports rising 50% to $25 million as brand owners capitalised on the opportunities opened by the New Zealand China Free Trade Agreement. Significantly, there have been no bulk shipments to this market in the past 12 months and the average FOB price is a high $11.47 per litre.

Despite the positives, New Zealand's overall FOB price per litre has continued to decline gradually. The average value of all exports is $6.58 per litre (-7%). Packaged wine has experienced a smaller decline, and now averages $8.45 per litre down 3% on 2011.

Increased bulk wine exports have played a major role in the fall in the return per litre, but the strong NZ dollar is also an influence. This is not just because it reduces the value of transactions priced in US dollars or UK pounds; it also drives offshore buyers to offset their weak currencies by packaging in their home markets.

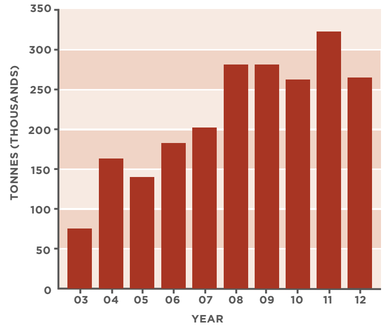
Declining FOB prices do not necessarily equate to price erosion in the market. While deep discounting does occur from time to time, this is far from the norm for New Zealand wine. In fact, the Strategic Review showed our average price in-market has been surprisingly resistant despite bulk wine and the recent global financial turmoil.

Looking forward we expect the small 2012 vintage will significantly reduce the volume of bulk wine exports in the year ahead. Nevertheless, the desire of powerful retailers to capture more value in the supply chain suggests they will remain a component of the New Zealand wine proposition into the future.

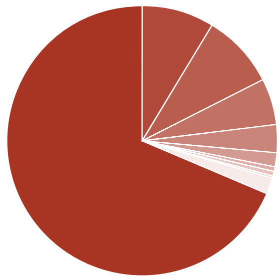
Accepting that unpackaged wine exports are here to stay does not mean that the wine sector should be any less concerned about the implications of this trade. Exporting unbranded wine essentially transfers value and brand control from producers to distributors and retailers.

In addition, the fact that bulk wine is not subject to New Zealand's stringent regulations once it leaves our shores also presents an element of risk. New Zealand Winegrowers has been pushing to ensure that bulk wine can only be exported to offshore facilities that are audited to the same standards as New Zealand packaging facilities. The decision now rests

VINTAGE 2012 (BY TONNES)



VINTAGE 2012 (BY VARIETY)



SAUVIGNON BLANC 68.6%
PINOT NOIR 8.8%
CHARDONNAY 8.7%
PINOT GRIS 5.8%
MERLOT 3.1%
RIESLING 1.9%
SYRAH 0.5%
GEWÜRZTRAMINER 0.5%
CABERNET SAUVIGNON 0.4%
OTHER 1.7%

"NEW ZEALAND AS A WHOLE SEEMS TO EXPRESS ITSELF IN EVERY BOTTLE AND EACH REGION PUTS ITS OWN STAMP ON EVERY GLASS AND MOUTHFUL... THEY ARE ALSO PURE AND FRESH, A REFLECTION OF SUSTAINABLE AGRICULTURE, OF AMPLE DAYTIME SUNSHINE AND IDEALLY COOL EVENINGS."

DAENNA VAN MULLIGAN — TASTE MAGAZINE, CANADA, APRIL 2012

CHAIR'S REPORT

with the Government. It is hoped that government will ensure all wine bearing the New Zealand brand offers the same guarantee of integrity and quality wherever it is packaged.

SUPPLY GETS TIGHTER

Vintage is always a central part of any wine year. In 2012 despite a late and cool season we expect overall quality to be excellent as most regions benefited from benign autumn conditions.

Supply, however, will be tight in a market where demand has continued to grow. The harvest of 269,000 tonnes was down 18% (59,000 tonnes) on the previous year while wine production of 194 million litres will be well below last year's sales total of over 240 million litres. With stocks of past vintages in short supply as well, it is clear that New Zealand will not be able to satisfy global demand for its premium wines.

Responding to the smaller vintage, average grape prices recovered somewhat to $1,315 per tonne. The increase will be welcomed by growers but it is unlikely to ease the economic pain they are experiencing as lower yields more than offset the current year's price rebound.

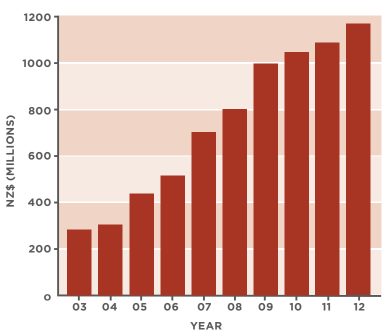
Increased tension between supply and demand will likely result in further grape price rises in the coming vintage. Given more normal yields, this will hopefully be sufficient to bring financial sustainability back to hard hit growers. In the meantime, however, there are still many hard months of investment and risk in the vineyard before this prospect can become a reality.

On the winery side, the reduced vintage will mean many wineries will face difficult choices between provisioning hard-won shelf space in established markets and allocating limited stocks towards new opportunities. This represents a dramatic turnaround from just two or three years ago when wineries were struggling to find the markets for the increased supply from the 2008 and 2009 vintages. Supplies of wine available for unbranded bulk exports will be scarce and wineries will look to entrench premium price positions.

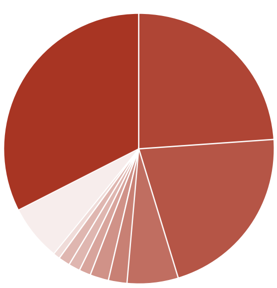
Investment in new vineyard plantings has been on hold for the last four years and the availability of planting material for any major developments is limited at present. As a result, supply capacity will be constrained in the medium term with any increase in production (above 2011 levels) heavily dependent on the weather and on the discipline of the industry. Events of recent years have taught the value of strict yield management; this is a lesson that should not be forgotten in times of more constrained supply.

New investment in vineyard development will be necessary in the future, but it must be founded on sound planning and not speculation. The 2008 vintage is a vivid illustration of just how delicate the balance between supply and demand can be.

WINES BY EXPORT VALUE



2012 MAJOR MARKETS BY VALUE NZ$ (MILLIONS)



AUSTRALIA 380.5
UK 284.0
USA 251.3
CANADA 70.9
NETHERLANDS 26.7
CHINA 25.2
HONG KONG 18.4
IRELAND 16.3
SINGAPORE 14.5
SWEDEN 11.6
OTHER 77.4

PROTECT AND GROW

Last year's Annual Report gave a very clear message. The world in which growers and wineries operate has changed and the wine industry needs to take stock of the new environment to make informed decisions about the future.

The Strategic Review found that the New Zealand wine industry was well positioned for the future. Protecting New Zealand's competitive advantage in high-priced premium wine exports and growing the valuable opportunities that exist in USA, China and Europe were considered essential to the wine industry's future.

THE STRATEGIC REVIEW FOUND THAT THE NEW ZEALAND WINE INDUSTRY WAS WELL POSITIONED FOR THE FUTURE

New Zealand Winegrowers was found to be an effective organisation that measured up well against its peers. A new strategic focus around the concepts of "protect" and "grow" was recommended for the national body and 10 new or extended activities were proposed.

Putting the recommendations of the Strategic Review into effect has been the major focus for New Zealand Winegrowers since the report was delivered.

Already, the national body has: created a national vineyard register to accurately track production trends; restructured and reprioritised its marketing and research functions; initiated a new brand audit for New Zealand Wine; developed a promotional platform for the industry's sustainability positioning; petitioned the Government to bring the Geographical Indications Act into force and institute controls on bulk wine exports; and established a high level working group to examine industry governance arrangements.

Social responsibility is an area where major new investment has been agreed. While wine is a beverage that should be enjoyed in good health and moderation, harmful consumption of alcoholic beverages is an area of serious concern. As an industry, wine needs to become more proactive in its commitment to responsible drinking. To that end, a new social responsibility strategy has been approved and a major consumer-facing initiative is in development.

A NEW PHASE

The past few years have been challenging ones for our sector. Since 2008 important lessons have been learned by all participants in the industry and these will not be forgotten.

But now the New Zealand wine industry is entering another phase in its development

Recognising this New Zealand Winegrowers invested in the Strategic Review and a new Strategic Plan is in place as a result. The post-Strategic Review initiatives already underway illustrate the commitment of New Zealand Winegrowers to leading the industry forward within the framework of a new Plan.

Now we are firmly focused on the issues and opportunities of the future rather than the challenges of the past few years. The Board is confident the new Plan provides a clear path forward for New Zealand wine, our wineries and our growers. As such, New Zealand Winegrowers is well positioned to serve and lead the industry through the next phase of its evolution.

STUART SMITH **CHAIR**

STEVEN GREEN **DEPUTY CHAIR**

> **“BUT THIS IS MUCH MORE THAN A ONE-VARIETY COUNTRY... THERE ARE DIFFERENT SOIL STRUCTURES AND CLIMATES WHICH ARE PERFECT FOR A WHOLE RANGE OF GRAPES.”**

CHRISTINE AUSTIN — YORKSHIRE POST, UK, MARCH 2012

ADVOCACY MISSION: PROTECTING MEMBERS' ABILITY TO PRODUCE, MARKET AND SELL COMPETITIVELY

Minimising compliance costs, securing the integrity of New Zealand wine and ensuring free and fair market access are the core Advocacy activity areas.

The Advocacy team is focussed on a number of high priority initiatives, as well as maintaining business-as-usual operations such as providing essential guidance on employment, winemaking and labelling practices.

- New Zealand Winegrowers has strongly pursued the implementation of controls on bulk wine to ensure that New Zealand wines are bottled offshore under the same standards as those bottled at home.
- A great deal of work has gone into submissions to minimise the disproportionate cost of licensing on small wineries under the Alcohol Reform Bill. It seems likely that there will be some concessions for low-risk premises such as winery cellar doors as a result of the national organisation's advocacy.
- A major new investment has been made in the area of social responsibility. One of the major elements will be a ground-breaking information platform that can be used by all members.
- Implementation of geographical indications legislation has been one of the key requests of Government. A new GI registration system will give the wine sector an excellent opportunity to deepen its regional stories as well as offering a higher level of protection in offshore markets.
- Two important international meetings will be held in Auckland in November 2012 - the APEC Wine Regulators Forum and World Wine Trade Group meetings. These meetings are designed to build an understanding of wine issues among regulators in developing markets and create best practice models for the regulation of the wine trade internationally.

ONE OF THE MAJOR ELEMENTS WILL BE A GROUND-BREAKING INFORMATION PLATFORM THAT CAN BE USED BY ALL MEMBERS

- New Zealand Winegrowers has been active in seeking better market access for wine in the free trade agreements negotiations with the Trans-Pacific Partnership, the Russia-Belarus-Kazakhstan Customs Union, India and others.

SUBMISSIONS

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

INTERNATIONAL

Australia and New Zealand Food Regulation Ministerial Council Review of Food Labelling Law (Sept 2011)

Russia-Belarus-Kazakhstan Customs Union Technical Regulations 'On the Safety of Wine' (Dec 2011)

US TTB Notice 122 on Vintage Date Requirements (Dec 2011)

EU Allergen Labelling (February and May 2012)

Brazil Safeguard Investigation (May 2012)

EU Organic Wine Standard (on-going)

Request for Mutual Recognition of Victorian 'Responsible Service of Alcohol' Training (May 2012)

Opposition the EU's Application to Register "Zeeland" as a Dutch GI in Australia (April 2012)

China Customs Procedures Project (on-going)

Russia-Kazakhstan-Belarus Free Trade Agreement (April 2012)

OIV Proposed Draft Resolutions (March, June 2012)

OIV Process for Expanding List of Chinese Additives (on-going)

DOMESTIC

Wine Act Verification Costs (August 2011)

Auckland Council Draft Plan Joint Industry Submission (November 2011)

Vintage Staff – Proposal for Improvements to AIP Process (August-September 2011)

Wine Standards Management Plan Code of Practice (Version 2) (December 2011)

Auckland Council Waste Minimisation Plan (January 2012)

Crown Entities Reform Bill (February 2012)

Geographical Indications (Wines and Spirits) Act Implementation (February 2012)

Consumer Law Reform Bill (March 2012)

Wine Act Verifiers Training (March 2012)

Tasman District Council Plan Change 14 (March 2012)

Bulk Wine Export Controls (on-going)

Land and Water Forum (on-going)

Marlborough District Council Plan Change 23 and 58 (on-going)

Trademark opposition proceedings in relation to "South Island" (on-going)

INTERNATIONAL MEETINGS 2011-12

18-19 September 2011 APEC Wine Regulators Forum, San Francisco, USA

17-21 October 2011 WWTG Meeting, Santiago, Chile

24-28 October 2011 OIV Extraordinary General Assembly, Paris, France

17-18 February 2012 Australia/USA/New Zealand Joint Technical Regulatory Committees Meeting, Auckland

20 February 2012 US Congressional Staff Meeting with New Zealand/Australia/USA, Auckland

28 February–2 March 2012 Export Controls Study, Wine Australia, Adelaide, Australia

4-17 March 2012 OIV Expert Group Meetings, Paris, France

19-21 March 2012 FIVS General Assembly and Spring Congress, Brussels, Belgium

22-23 March 2012 World Wine Trade Group Inter-sessional Meeting, Brussels, Belgium

15-16 June 2012 FIVS Wine Category Committee Meeting, Istanbul, Turkey

18-22 June 2012 OIV World Congress and General Assembly, Izmir, Turkey

10-13 July 2012 WWTG Inter-sessional meeting, San Francisco, USA

> "NEW ZEALAND SAUVIGNON BLANCS ARE THE BIKERS OF THE WHITE-WINE WORLD, COMING AT YOU WITH BLINDING LIGHTENING AND ROLLING THUNDER."

MIKE DUNN — SACRAMENTO BEE, USA, JULY 2012

RESEARCH MISSION: BUILDING A KNOWLEDGE PLATFORM THAT PROTECTS MEMBERS' ABILITY TO PRODUCE EXCEPTIONAL WINES AND SUPPORTS INNOVATION

THE FUTURE OF THE NEW ZEALAND WINE INDUSTRY RELIES ON RESEARCH LEADING TO TECHNICAL INNOVATION

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

1. PESTS AND DISEASES
2. REDUCING COSTS, INCREASING PROFITABILITY
3. SUSTAINABILITY AND ORGANICS
4. QUALITY WINE STYLES FOR EXISTING AND DEVELOPING MARKETS
5. TECHNOLOGY TRANSFER

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

KEY INITIATIVES AND RESULTS FROM 2011-2012

1. PESTS AND DISEASES

Botrytis: The membership survey conducted by New Zealand Winegrowers in 2011 indicated that management of botrytis continues to present the most significant seasonal challenge in vineyards, requiring a continued commitment in research.

2012 marks the 15th anniversary of New Zealand Winegrowers' funded research into botrytis management. Research results have been presented to the industry in various publications, workshops and conferences on an on-going basis. New Zealand Winegrowers has funded a (soon to be published) book on botrytis management. This book synthesises 15 years of research findings into a comprehensive summary, including key outcomes that have been adopted by the sector into best practice. In addition, the research programme continues to investigate improved measures for botrytis management. Diverse projects include improved sampling protocols for monitoring botrytis and investigating impacts of early defoliation, mechanical fruit thinning and tendril removal on botrytis management.

Leafroll virus 3: The virus elimination project continues to provide clear and practical guidelines on how to manage the highly destructive leafroll virus type 3 in vineyards. The project has focused on effective removal of infected vines and replacement with certified virus free vines. The project will continue over the next three years; it will expand its investigations into processes to ensure new virus free plantings are protected from reinfection. The project also investigated improved control of mealybugs, which are the primary cause of spreading the disease. The pilot project has been focused in Hawke's Bay with satellites in other North Island regions. Over the next three years the programme will extend its reach to the South Island with a specific focus on Marlborough.

2. REDUCING COSTS, INCREASING PROFITABILITY

Yield management and mechanical thinning: New Zealand Winegrowers responded to growers' concerns regarding options for managing yields in 2013 by providing a special publication, Yield Management Information Supplement: Preparing for Vintage 2013. This publication draws together knowledge from several long-term projects related to managing crop levels and the implications on fruit quality. The supplement provides practical guidance on yield potentials for vintage 2013, how to manage vines to target specific yields, and options to implement mechanical thinning as a complementary tool to fine-tune production.

Mechanical thinning allows timely and cost-effective yield management after fruit set and assists with botrytis control in a variety of ways. Years of field and laboratory trials now underpin solid technical transfer in this area, starting with the supplement and continuing via seminars presented at Grape Days events and elsewhere.

3. SUSTAINABILITY / ORGANICS

Interest in organic production is on the rise in the sector, and there is a strong demand for information on organic production systems. The Organic Focus Vineyard project has been established to provide information on the production and management issues that must be addressed to convert to organic production. The project has designated vineyards in Hawke's Bay, Marlborough and Central Otago. Each vineyard has side-by-side organic and conventionally managed blocks that are being closely monitored, and they act as demonstration blocks for industry field days. Early monitoring is already feeding back to guide future research that will benefit the wider industry including; soil and weed management and botrytis management.

4. QUALITY WINE STYLES

To a large extent all research projects are designed to contribute directly to final wine quality. However, a major theme in the portfolio is developing understanding of elements of grape growing and winemaking that result in our uniquely distinctive New Zealand wine profiles. Various research projects endeavour to identify and understand individual components and compounds of our varietal wines. This area of research provides grape growers and winemakers with greater understanding of the viticultural and wine making tools available to enhance desirable aromas and flavours. Wine sensory experiments help to winemakers in matching specific wine styles to consumer preferences.

5. TECHNOLOGY TRANSFER

New Zealand Winegrowers continues to work closely with its primary research partners at Plant & Food Research, Lincoln University, and Auckland University and funding agencies such as the Ministry of Primary Industries, Sustainable Farming Fund.

A vital part of each research project is summarising scientific findings into practical processes and materials, and presenting applied findings to grape growers and winemakers. New Zealand Winegrowers have supported many workshops and field days throughout the year. The research programme provides a growing body of information to industry members through a range of publications, the industry website, special events featuring visiting experts, and the annual Romeo Bragato Conference.

Each issue of New Zealand Winegrower magazine contains a Research Supplement, providing progress updates on individual projects, which is also published on New Zealand Winegrowers' website. Along with short and easy-to-read fact sheets, the information is available to all website visitors.

The Grape Days seminars are annual one-day technical events specifically designed to report on and transfer knowledge from the research programme. Held in both the North and South Islands, Grape Days combine high-level technical summaries with a practical applied focus. The events are recorded and are made available to members on New Zealand Winegrowers' website.

"THERE'S A NEW KID ON THE BLOCK WHEN IT COMES TO DISTINCTIVE REDS: NEW ZEALAND PINOT NOIR. IF YOU HAVEN'T TRIED ONE YET, NOW'S THE TIME."

MARYANN WOROBIEC — WINE SPECTATOR USA, JUNE 2012

RESEARCH PROJECTS FUNDED THIS YEAR

1. PESTS AND DISEASE

Implementation of virus elimination strategy
Various (Nick Hoskins – Project Manager)
Supported by MPI Sustainable Farming Fund

A sex pheromone as a citrophilus mealybug monitoring tool (2011-12)
Plant and Food Research (Jim Walker)

Cryopreserved grapevine: a new way to maintain high-health germplasm and cultivar imports with less rigorous quarantine regulations
Plant and Food Research (Ranjith Pathirana)

Managing botrytis in New Zealand viticulture
Vino Vitis Ltd (Ruby Andrews)

Botrytis decision support (BDS) industry training & botrytis sampling protocols
Plant and Food Research (Rob Beresford)

Understanding causes of slip skin
Plant and Food Research (Rob Beresford)

Improving management of grapevine trunk diseases in New Zealand
South Australian Research & Development Institute (SARDI), (Mark Sosnowski)

Detection of plasmopara viticola (grapevine downy mildew) oospores in New Zealand
Plant and Food Research (Peter Wood)

Describing GLRaV-3 sequence variants in New Zealand
Plant and Food Research (Robin MacDiarmid)

2. COST REDUCTION/INCREASED PROFITABILITY

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

Tendrils as a source of seasonal carryover of Botrytis cinerea in vineyards
Plant and Food Research (Dion Mundy)
Supported by MAF Sustainable Farming Fund

3. SUSTAINABILITY/ORGANICS

Organic focus vineyard project
Organic Winegrowers New Zealand (Rebecca Reider)
Supported by MPI Sustainable Farming Fund

Residue profile in grape leaves and sheep meat and offal from leaf plucking in vineyards
Agrivet Services Ltd (Ben Vlaming)

Satellites for improved irrigation advice
Plant and Food Research (Marc Greven)
Supported by MPI Sustainable Farming Fund

4. QUALITY WINE STYLES FOR EXISTING AND DEVELOPING MARKETS

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

Unlocking New Zealand Pinot Noir aroma through aroma reconstitution approach
Auckland University (Paul Kilmartin)

Understanding the accumulation of fruit based green aromatic methoxypyrazine compounds in Marlborough Sauvignon Blanc grape berries
Plant and Food Research (Jeff Bennett)

Early defoliation: carryover and hand versus mechanical
Eastern Institute of Technology (EIT) (Mark Krasnow)

Potassium nutrition of grapevines
Plant and Food Research (Mike Trought)

The development of a functional genomics tool for the capture and characterization of transposon mutants in Vitis Vinifera (PhD Scholarship)
Rod Bonfiglioli Scholarship
Lincoln University (Darrell Lizamore)

The effect of post-harvest defoliation on carbon and nitrogen balance of high yielding Sauvignon Blanc vines
Plant and Food Research (Marc Greven)

Identification of metabolites in high-thiol grape juices
Auckland UniServices Ltd (Silas Villas-Boas)

Investigation of perceived minerality in white wine
Lincoln University (Wendy Parr)

Identification and quantification of chiral volatile compounds in New Zealand wines that affect aroma
Lincoln University (Roland Harrison)

Tools for manipulating Sauvignon Blanc wine flavour and aroma: Harvest and processing of grapes
Plant and Food Research (Claire Grose)

5. TECHNOLOGY TRANSFER

Romeo Bragato Conference

New Zealand Winegrowers Fact Sheets

New Zealand Winegrowers Magazine Research Articles

New Zealand Winegrowers Grape Day Workshops

Visiting Experts

- July 2011 – Seminars/field days in Hawke's Bay, Gisborne, Marlborough and Central Otago on downy and powdery mildew and bunch rots.

  Presenter: Peter Magarey (Magarey Plant Pathology, Loxton, South Australia)

- November 2011 – Grapevine Trunk Disease Workshops in Hawke's Bay and Marlborough, showcasing international research on effective management of eutypa dieback and canker diseases.

  Presenters: Mark Sosnowski (South Australian R&D Institute), Doug Gubler (University of California, Davis) and Marlene Jaspers (Lincoln University).

- May 2012 – Workshops in Hawke's Bay and Marlborough on extended sheep grazing, moving beyond the common seasonal use of vineyard grazing to a system that allows for grazing throughout the year.

  Presenter: Kelly Mulville (Holistic Resource Management Consultant and Vineyard Manager, USA).

> “FOLKS IN THIS ISOLATED, QUIET COUNTRY ARE PASSIONATE ABOUT THEIR WINES. BUT THEY HAVE A WONDERFUL ABILITY TO LAUGH AT THEMSELVES AS THEY TRY TO COAX MAGIC OUT OF A TINY PIECE OF FRUIT.”
>
> **JIM BYERS** — TORONTO STAR, CANADA, SEPTEMBER 2012

SUBSTAINABILITY MISSION: TELLING THE NEW ZEALAND SUSTAINABILITY STORY AND BUILDING SUSTAINABILITY CREDENTIALS

In 2007, New Zealand Winegrowers set sights on the aspirational goal of 100% sustainable accreditation of grape and wine production by vintage 2012. At the time only 13,500 hectares of vineyards were participating in Sustainable Winegrowing New Zealand (SWNZ), and winery members accounted for less than 50% of winemaking capacity.

Five years on, approximately 32,000 hectares of vineyards participate in the programme, the equivalent of 94% of the country's total plantings, and a similar proportion of the winemaking capacity also participates. In addition the sector has seen a significant increase in participation in organic production with an estimated 1,800 hectares now certified or in conversion.

Since vintage 2010 all wines participating in activities organised by New Zealand Winegrowers have met the sustainable accreditation requirement. Sustainable accreditation, be it SWNZ or certified organics, has become a standard pre-requisite in supply contracts.

The sustainable journey is, however, one of continuous improvement. New Zealand Winegrowers will continue to promote adoption of certified sustainable practices as new issues and challenges emerge.

NEW SUSTAINABILITY COMMITTEE

The new strategic plan for New Zealand Winegrowers reaffirms the central importance of sustainability in the international positioning of New Zealand wine and New Zealand Winegrowers activities. In recognition of this, New Zealand Winegrowers has established a new Board Committee to oversee the sustainability portfolio. The new Committee has a broad brief but is focused on assisting our members gain a strategic advantage in markets through their commitment to sustainable production, and returning value to members through improved reporting.

Promotion of sustainability provides assurance to customers and consumers alike of the integrity of the wine they are drinking. Integration of our sustainability story into the New Zealand wine brand is underway and will be implemented in coming months. New Zealand Winegrowers will assist members in telling their own stories in a compelling way, and by providing a platform to take their story to their markets.

ORGANICS

Interest and participation in certified organic production continues to grow. New Zealand Winegrowers' relationship with the organic winegrowing community is cemented through a Memorandum of Understanding with Organic Winegrowers of New Zealand. In 2010, a joint vision of 20% organic production in our sector by 2020 was proposed. This seemed very aspirational, and if achieved it would put New Zealand at the forefront of organic wine production on the world stage. Two years, on the continued growth in participation in this production system indicates 20% by 2020 may be a conservative goal.

SINCE VINTAGE 2010 ALL WINES PARTICIPATING IN ACTIVITIES ORGANISED BY NEW ZEALAND WINEGROWERS HAVE MET THE SUSTAINABLE ACCREDITATION REQUIREMENT

New Zealand Winegrowers strongly supports truth in labelling we have developed a Code of Practice (COP) on environmental claims as a best practice guide for producers. The COP sets the baseline for the terms "sustainable", "organic and "biodynamic" and provides practical guides for vetting label claims.

New Zealand Winegrowers also represents the industry in international fora where sustainable production systems are being defined, to ensure no barriers to trade result from inappropriate definitions. Alongside this, significant work has been undertaken to ensure that market access is not restricted by labelling restrictions relating to organic and sustainability claims.

ADDING VALUE THROUGH BENCHMARKING

At a practical level SWNZ aims to lead improve business efficiency and profitability. To that end SWNZ has an annual sustainability theme - a focus on specific issues to assist members. This year the theme has been around water and energy use efficiency. Individual reports have been generated for all members, allowing them to compare water and energy use with regional and national averages. These reports allow members to evaluate their own performance and consider options for improved practices.

TRAINING AND EDUCATION

One of the most important aspects of continuous improvement is the on-going development of knowledge and application of best practices. A key role of New Zealand Winegrowers is to provide members with access to the best information and tools to protect and support their businesses.

One of the primary vineyard starting points for reducing environmental risk and ensuring sound fruit at harvest is the effective application of agricultural sprays. Whether the agrichemicals applied are organic or synthetic, they are rendered ineffective if they applied incorrectly, at the wrong rate, or if they miss the intended target. In the past year SWNZ conducted spray application workshops providing the latest information on good application practices. These were attended by more than 400 industry members.

Further New Zealand Winegrowers in partnership with the New Zealand Agrichemical Education Trust has implemented a pilot programme for progressive recertification of GROWSAFE certificates. This allows growers to attend industry relevant training and receive recognition for this. Attendance at the spray application workshop was the first event to count towards recertification of GROWSAFE certificates. A comprehensive online resource to disseminate appropriate information has been developed.

In a similar vein SWNZ partnered with the Virus Elimination Project to host regional workshops to disseminate the latest findings of this project, and promoting proactive management of virus through vine removal and replacement.

MARKETING MISSION: DEVELOPING AND SUPPORTING THE GROWTH OF THE NEW ZEALAND WINE BRAND

ACTIVITIES IN THE PAST YEAR HAVE BEEN UNDERTAKEN WITHIN THE CONTEXT OF THE STRATEGIC REVIEW AND DEVELOPMENT OF OUR NEW PLAN

Traditionally New Zealand Winegrowers marketing initiatives have incorporated two distinct forms of activity – first, generic promotional activity focussed on building the New Zealand wine brand awareness and understanding, and second, user-pays events targeted at individual wine brands.

The 2011 Strategic Review recognised the legitimacy of both these areas of activity, but suggested a formal division between the two in order to provide greater transparency and accountability. This division is now in place with the levy funded Marketing team solely concentrating on New Zealand wine brand activity and a new Events team focussed on user-pays brand events. Within this framework Events will only be undertaken if they are on-strategy in terms of supporting New Zealand wine brand activity.

The Strategic Review also endorsed:

- A focus on the markets with the greatest potential return for New Zealand wine – Asia, in particular China, North America and Mainland Europe;
- A focus on creating positive relationships with key influencers being media, trade, educators or other influencers like bloggers;
- The importance of partnering with New Zealand Trade and Enterprise (NZTE) and others to build and launch the New Zealand Wine brand in development markets; and
- The importance of building our proprietary knowledge of markets in order to inform our marketing and communications as well as sharing these insights with our members.

Activities in the past year have been undertaken within the context of the Strategic Review and development of our new Plan. Key developments include:

- An audit of the New Zealand wine brand has been conducted to test market perceptions of the health and attributes of our key asset – our reputation. The first phase of this exercise is now complete. Ultimately the audit will help inform the planning of our future brand communications. On completion of the brand audit, the full report will be available to members.
- The importance to the whole sector of communicating our sustainability story was strongly reinforced by the Strategic Review. This project is now well advanced. Our objective is to raise the awareness of our industry's sustainability credentials, 'make sustainability make sense', and detail why sustainability is important to us. The foundations for an emotive and authentic way of telling our story are now in place and will be integrated into our messaging in the coming year.
- An on-line presence is an increasingly important tool to deliver the New Zealand wine message to the geographically and culturally diverse community who have a love of our wines. With over 16,000 visitors from 100+ countries on average each month, the New Zealand Winegrowers' website (nzwine.com) is a powerful tool in telling the New Zealand wine story. In addition over the last 6 months, followers of the @nzwine twitter account have increased 26% to over 11,000 and continue to grow each week.
- The Rugby World Cup provided an opportunity for us to work with the wider 'NZ Inc' community in terms of taking the New Zealand story to the world. Our partnership with NZ2011 worked very well and

has provided a template for further joint initiatives in the future. The America's Cup in San Francisco is the most immediate opportunity to tell the 'NZ Inc' story and we look forward to this.

- Finally New Zealand Winegrowers managed itineraries for over 50 in-bound visitors from 12 countries in 2011/12 as well as hosting more than 40 master classes and themed self-pour tastings in 16 cities. Together, these activities provide information to a tightly focused audience of decision makers and influencers in our target markets.

The year ahead is all about delivering a revitalised suite of marketing activities within the framework of the new Strategic Plan. The fundamentals for this are now in place with the split between New Zealand wine Marketing and Events confirmed, a new management structure in place, a new funding arrangement for Events and decisions made in respect of our off-shore offices.

Growth markets such as Asia (especially China, Continental Europe and North America) are our primary focus as these are markets where our category is still in the development phase. Our commitment to Asia is highlighted by our decision to open an Asian office this year.

In development markets, partnering with NZTE to ensure on-strategy co-ordination of all New Zealand wine activities will deliver major benefits to the sector and to New Zealand over the medium to long term. With NZTE we are in the process of developing and delivering an integrated marketing and communications programme in some of the major growth markets - notably China, Germany, Netherlands and Sweden. In respect of North America, we have an on-going and major commitment to these markets and are retaining our offices in New York, San Francisco and Toronto.

In more established markets, such as the UK and Australia, our aim will be to protect our market position by delivering user-pays events that provide a platform for individual brand success. Generic New Zealand wine activity will be more limited in these markets, focussing on growth opportunities (for example on-premise) or leveraging activities that are more international in flavour, rather than country-specific.

Pinot Noir 2013 will be the fifth iteration of this important international event. For New Zealand Winegrowers this provides an opportunity to bring a number of key media and trade to this country to experience the real New Zealand and the real New Zealand wine story. Media and trade visits around this event in previous years have delivered tangible benefits to the sector and we expect this to be the case again in 2013.

Finally, 2013 will culminate with the Wine Exporters Forum. This Forum provides a one-stop shop of information for exporters on markets, opportunities and challenges. As the sector moves into a supply environment dominated by constraint, the Forum will mark our progress to date and the path forward for New Zealand wines on the international stage.

EVENTS 2011/2012

COUNTRY	CITY	MONTH	NAME	TYPE	AUDIENCE
Australia	Melbourne, Sydney, Brisbane	February 2012	New Zealand in a Glass: East Coast	Wine Fair	Distributors, Trade, Media, Public
Australia	Noosa	May 2012	Noosa Food & Wine Festival	Food & Wine Festival	Media, Public
Canada	Vancouver	May 2012	New Zealand Wine Fair	Wine Fair	Trade, Media, Public
Canada	Alberta, Calgary	May 2012	New Zealand Wine Fair	Wine Fair	Media, Retailers, On-Trade
Canada	Ottawa	May 2012	New Zealand Wine Fair	Wine Fair	Trade, Media, Public
Canada	Toronto	May 2012	New Zealand Wine Fair	Wine Fair	Trade, Media, Public
China	Beijing	May 2012	New Zealand Wine Fair	Wine Fair	On-Trade, Media, Retailers, Distributors/Importers/Agents
China	Shanghai	May 2012	New Zealand Wine Fair	Wine Fair	On-Trade, Media, Retailers, Distributors/Importers/Agents

EVENTS 2011/2012 (CONTINUED)

COUNTRY	CITY	MONTH	NAME	TYPE	AUDIENCE
China	Guangzhou	November 2011	New Zealand Wine Fair	Wine Fair	On-Trade, Media, Retailers, Distributors/Importers/Agents
Germany	Düsseldorf	March 2012	ProWein International Wine Fair	Wine Fair	On-Trade, Media, Retailers, Distributors/Importers
Hong Kong	Hong Kong	May 2012	Vinexpo Asia Pacific 2012	Expo / Fair	Media, Importers/Distributors/Agent, On-Trade, Retailers
Hong Kong	Hong Kong	November 2011	Hong Kong International Wine & Spirits Fair	Wine Fair	Media, Importers/Distributors/Agent, On-Trade, Retailers
Ireland	Dublin	January 2012	Annual Trade and Consumer Tasting	Wine Fair	Media, On-Trade, Retailers, Importers, Public
Japan	Tokyo	November 2011	New Zealand Wine Fair	Wine Fair	On-Trade, Media, Importers/Distributors/Agents
Japan	Osaka	November 2011	New Zealand Wine Fair	Wine Fair	On-Trade, Media, Importers/Distributors/Agents
Netherlands	Amsterdam	November 2011	New Zealand Wine Fair	Wine Fair	Sommeliers, Importers, Media, Retail Buyers
Sweden	Stockholm	November 2011	New Zealand Wine Fair	Wine Fair	On-Trade, Sommeliers, Importers, Media, Retailers
United Kingdom	London	December 2011	Three Wine Men (Christmas)	Consumer Fair	Public, Media
United Kingdom	London	January 2012	Annual Trade and Consumer Tasting	Wine Fair	Media, On-Trade, Sommeliers, Public, Retail Buyers
United Kingdom	Edinburgh	June 2012	Three Wine Men	Consumer Fair	Public, Media
United Kingdom	London	November 2011	The Wine Show	Consumer Fair	Public, Media
United Kingdom	Edinburgh	November 2011	The Wine Gang	Consumer Fair	Public, Media
United Kingdom	Manchester	October 2011	Three Wine Men	Consumer Fair	Public, Media
United Kingdom	London	October 2011	The Wine Gang	Consumer Fair	Public, Media
United Kingdom	London	September 2011	New Release Trade Tasting	Tasting	Media, On-Trade, Sommeliers, Public, Retail Buyers, Importers/Distributors
United Kingdom	London	September 2011	Three Wine Men	Consumer Fair	Public, Media
United States	Rhode Island	August 2011	Society of Wine Educators Conference	Tasting	Media, Importers/Distributors, Wine Educators
United States	Washington	February 2012	Washington DC International Wine and Food Festival	Food & Wine Festival	Public, Trade
United States	California	February 2012	International Alsace Varietal Festival: Anderson Valley (CA)	Festival / Tasting	Public, Media
United States	Boston	January 2012	Boston Wine Expo	Wine Expo	Public, Trade
United States	Los Angeles	January 2012	Pinot Days – Los Angeles	Tasting	Public, Media, Trade
United States	San Francisco	June 2012	Pinot Days – San Francisco	Tasting	Public, Media, Trade
United States	California	March 2012	World of Pinot Noir, Pismo Beach	Tasting	Public, Media, Trade
United States	New York	March 2012	New York Wine Expo	Wine Expo	Public, Trade, On-Trade
United States	New York	May 2012	New Zealand Wine Fair	Wine Fair	Media, On-Trade, Sommeliers, Retail Buyers, Public
United States	San Francisco	May 2012	New Zealand Wine Fair	Wine Fair	Media, On-Trade, Sommeliers, Retail Buyers, Public
United States	New York	November 2011	Around the World in 80 Sips (Bottlenotes)	Tasting	Public
United States	Chicago	November 2011	Pinot Days – Chicago	Tasting	Public, Media, Trade

INFORMATION RESOURCES

A CORE FUNCTION OF NEW ZEALAND WINEGROWERS IS THE PROVISION OF UP-TO-DATE INFORMATION, DELIVERED IN A TIMELY MANNER

A core function of New Zealand Winegrowers is the provision of up-to-date information delivered in a timely manner to both members and a wider trade and consumer audience. In addition to the abundance of information and reports downloadable from nzwine.com, New Zealand Winegrowers also produces a wide range of printed publications, brochures and promotional items, ranging from spray schedules to varietal sales guides for international retail staff. A monthly newsletter is also emailed directly to all members and the informative New Zealand Winegrowers' magazine is distributed bi-monthly.

The following summarises the information and communication resources provided by New Zealand Winegrowers.

SURVEYS, PUBLICATIONS AND REPORTS

INDUSTRY SURVEYS & REPORTS

Strategic Review 2011
PwC for New Zealand Winegrowers

Sustainable Winegrowing New Zealand Review 2011
The Agribusiness Group for New Zealand Winegrowers

Vintage Survey 2012**
New Zealand Winegrowers

Monthly New Zealand Wine Export Report**
New Zealand Winegrowers

Monthly Domestic Market Report**
New Zealand Winegrowers

Nursery Survey 2012
New Zealand Winegrowers

LABELLING AND INTERNATIONAL MARKET ACCESS

International Labelling Guide (19th Edition) November 2011**
New Zealand Winegrowers

Code of Practice for Environmental Claims May 2012
New Zealand Winegrowers

VINEYARD, WINEMAKING AND CELLAR DOOR PRACTICES

Seasonal Vineyard Workers – A Practical Guide to Your Legal Obligations **
New Zealand Winegrowers / Bell Gully

Wind Machine Code of Practice **
New Zealand Winegrowers

Sharpen Up – A User Guide to Perfect Pruning (DVD) August 2012
New Zealand Winegrowers

Export Wine Grape Spray Schedule 2011/2012**
Rex Sunde, Fantail Island Ltd.

International Winemaking Practices Guide (6th Edition) November 2011*
New Zealand Winegrowers

Cellar Door and the Law April 1012
New Zealand Winegrowers

Code of Practice for Winery Waste Management (1st Edition) May 2010**
New Zealand Winegrowers / SWNZ / MWH

Wine Standards Management Plan Code of Practice (2nd Edition) November 2011**
New Zealand Winegrowers

MARKETING AND COMMUNICATIONS

Monthly Newsletter to Members**
New Zealand Winegrowers

New Zealand Winegrower
Published by Rural News Group Ltd under authority of New Zealand Winegrowers

Romeo Bragato Conference Proceedings
(Available for purchase: www.bragato.org.nz)

Euromonitor Country Market Reports for 30 Countries
New Zealand Winegrowers

New Zealand Wine Marketing Programme 2012/2013**
New Zealand Winegrowers

New Zealand Wine Promotional Material (varietal guides, maps, promo items etc)
New Zealand Winegrowers (Available for purchase)

New Zealand Winegrowers Post Event Reports**
New Zealand Winegrowers

New Zealand Winegrower's Board Meeting Reports**
New Zealand Winegrowers

Nielsen Scantrak Data Reports**
New Zealand Winegrowers

* Denotes those available on www.nzwine.com
** Denotes those available on www.nzwine.com/members

AIR NEW ZEALAND WINE AWARDS 2011

This event took place in November and culminated in the announcement of the trophy winners at the Gala Dinner held on Saturday 12 November at The Langham Hotel, Auckland.

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

TROPHY WINNERS

Air New Zealand Champion Wine of the Show
Villa Maria Single Vineyard Keltern Hawke's Bay Chardonnay 2010

O-I New Zealand Champion Sustainable Wine
Villa Maria Single Vineyard Keltern Hawke's Bay Chardonnay 2010

Label and Litho Champion Sauvignon Blanc
Dashwood Marlborough Sauvignon Blanc 2011

JF Hillebrand New Zealand Ltd Champion Pinot Noir
Pencarrow Martinborough Pinot Noir 2010

Rabobank Champion Chardonnay
Villa Maria Single Vineyard Keltern Hawke's Bay Chardonnay 2010

Wineworks Champion Sparkling Wine
The Sounds Marlborough Méthode Traditionnelle 2008

Stuff.co.nz Champion Gewürztraminer
Corbans Private Bin Hawke's Bay Gewürztraminer 2008

Guala Closures NZ Champion Pinot Gris
Spy Valley Marlborough Pinot Gris 2011

Plant & Food Research Champion Riesling
Martinborough Vineyard Manu Martinborough Riesling 2011

BDO Champion Other White and Rosé Wine
Waimea Nelson Viognier 2010

Business World Travel Champion Merlot
Villa Maria Reserve Hawke's Bay Merlot 2009

Gold Medal Vintage Insurance Champion Cabernet Sauvignon or Merlot/Cabernet Blend
Mudbrick Vineyard Waiheke Island Merlot Cabernet Sauvignon 2010

Fruitfed Supplies Champion Syrah
Bilancia Hawke's Bay Syrah 2010

New Zealand Winegrowers Champion Other Red Styles
Not Awarded

The Langham, Auckland Champion Dessert Wine
Charles Wiffen Late Harvest Marlborough Riesling 2009

New World Champion Open White Wine
Dashwood Marlborough Sauvignon Blanc 2011

Fairfax Media Champion Open Red Wine
Pencarrow Martinborough Pinot Noir 2010

Newstalk ZB Champion Exhibition White or Sparkling Wine
Lawson's Dry Hills The Pioneer Marlborough Gewürztraminer 2010

Kapiti Champion Exhibition Red Wine
Charcoal Gully Estate Sallys Pinch Central Otago Pinot Noir 2010

ROMEO BRAGATO WINE AWARDS 2011

Bragato Trophy, Champion Wine of Show
Villa Maria Single Vineyard Keltern Chardonnay 2010
Mark Dixon, Keltern Vineyard – Hawke's Bay

Richard Smart Trophy, Reserve Champion Wine
Saint Clair Pioneer Block 12 Lone Gum Pinot Noir 2010
Chris & Judi Simmonds, Lone Gum Vineyard Ltd – Marlborough

Bill Irwin Trophy, Champion Chardonnay
Villa Maria Single Vineyard Keltern Chardonnay 2010
Mark Dixon, Keltern Vineyard – Hawke's Bay

Sustainability Trophy (Decanter)
Villa Maria Single Vineyard Keltern Chardonnay 2010
Mark Dixon, Keltern Vineyard – Hawke's Bay

New Zealand Wine Cellars Spence Brothers Trophy, Champion Sauvignon Blanc
Saint Clair Pioneer Block 19 Bird Block Sauvignon Blanc 2010
Bob & Gill Bird, Thomsons Ford Vineyard – Marlborough

Friedrich Wohnsiedler Trophy, Champion Riesling
Brightwater Vineyards Nelson Riesling 2011
Gary Neale, Brightwater Vineyards – Nelson

Brother Cyprian Trophy, Champion Pinot Gris
Little Goat Creek Marlborough Pinot Gris 2011
Tim Crawford, Springwood Holdings – Marlborough

Champion Gewürztraminer
Pasquale Gewürztraminer 2010
Antonio Pasquale, Kurow Winery Estate – Oamaru

Champion Other White Wine (Decanter)
Villa Maria Single Vineyard Omahu Gravels Viognier 2010
Phil Holden, Omahu Vineyard – Hawke's Bay

Champion Dessert Wine (Plaque)
Saint Clair Awatere Valley Reserve Noble Riesling 2009
Simon & Vanessa Barker, Barkers Marque Vineyards Ltd – Marlborough

Tom McDonald Memorial Trophy, Champion Classical Red Wine
Vidal Legacy Cabernet Sauvignon Merlot 2009
Phil Holden, Omahu Vineyard – Hawke's Bay

Mike Wolter Memorial Trophy, Champion Pinot Noir
Saint Clair Pioneer Block 12 Lone Gum Pinot Noir 2010
Chris & Judi Simmonds, Lone Gum Vineyard Ltd – Marlborough

Champion Other Red Wine (Decanter)
Villa Maria Reserve Grenache 2007
Phil Holden, Omahu Vineyard – Hawke's Bay

Champion Rose (Plaque)
Yealands Estate Rose 2011
Peter Yealands, Yealands Estate – Marlborough

Alan Limmer Trophy, Champion Syrah (Decanter)
Mudbrick Shepherd's Point Syrah 2010
Nick Jones, Mudbrick Vineyard – Waiheke Island

Champion Merlot
Squawking Magpie Gimblett Gravels The Nest Merlot Cabernet Franc 2008
Gavin Yortt, Squawking Magpie – Hawke's Bay

SUMMARY: NEW ZEALAND WINE (2003-2012)

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Wine Companies*	421	463	516	530	543	585	643	672	698	703
Growers	625	589	818	866	1,003	1,060	1,117	851	791	824
Producing Area (hectares)	15,800	18,112	21,002	22,616	25,355	29,310	31,964	33,428.0	33,400	33,400
Average Yield (tonnes per hectare)	4.8	9.1	6.9	8.2	8.1	9.7	8.9	8.0	9.8	8.1
Average Grape Price (NZ$ per tonne)	1,929	1,876	1,792	2,022	1,981	2,161	1,629	1,293	1,239	1,315
Tonnes Crushed	76,400	165,500	142,000	185,000	205,000	285,000	285,000	266,000	328,000	269,000
Total Production (millions of litres)	55.0	119.2	102.0	133.2	147.6	205.2	205.2	190.0	235.0	194.0
Domestic Sales of NZ Wine (millions of litres NZ Wine)	35.3	35.5	45.0	50.0	51.0	46.5	59.3	56.7	66.3	63.5
Consumption per Capita NZ wine (litres NZ wine)	8.8	8.8	11.2	12.1	12.2	11.1	13.9	13.0	15.2	14.3
Total sales of all wine (millions of litres)	74.5	79.7	81.7	86.0	91.8	87.4	92.7	92.1	93.9	91.3
Consumption per capita all wines (litres)	18.6	19.6	19.8	20.6	21.7	20.8	21.5	21.1	21.3	20.6
Export Volume (millions of litres)	27.1	31.1	51.4	57.8	76.0	88.6	112.6	142.0	154.7	178.9
Export Value (millions of NZ$ FOB)	281.9	302.6	434.9	512.4	698.3	797.8	991.7	1,041	1,094	1,177

* Includes companies without actual sites

NEW ZEALAND WINEGROWERS MEMBERSHIP (2003-2012)

WINERIES BY CATEGORY*	2003	2004	2005	2006	2007*†	2008*†	2009	2010	2011	2012
Category 1	388	425	466	482	483	523	577	605	615	622
Category 2	30	34	44	42	51	56	60	61	73	71
Category 3	3	4	6	6	9	6	6	6	10	10
TOTAL	421	463	516	530	543	585	643	672	698	703

* **Up to 2007:** Category I – annual sales not exceeding 200,000 litres Category 2 – annual sales between 200,000 and 2,000,000 litres Category 3 – annual sales exceeding 2,000,000 litres

† **From 2008:** Category I – annual sales not exceeding 200,000 litres Category 2 – annual sales between 200,000 and 4,000,000 litres Category 3 – annual sales exceeding 4,000,000 litres

WINERIES BY REGION	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Northland	7	8	10	10	11	14	14	14	15	16
Auckland	89	88	90	91	92	103	109	111	117	118
Waikato/Bay of Plenty	13	13	17	18	17	19	20	21	17	15
Gisborne	16	17	19	22	19	22	24	26	24	24
Hawke's Bay	56	58	62	66	67	71	79	85	91	84
Wairarapa	44	49	54	56	57	58	61	63	64	64
Nelson	26	24	29	29	28	32	34	36	38	36
Marlborough	74	84	101	106	104	109	130	137	142	148
Canterbury/Waipara	42	46	50	48	52	54	62	61	66	68
Central Otago	52	75	82	82	89	95	103	111	115	120
Other Areas	2	1	2	2	7	8	7	7	9	10
TOTAL	421	463	516	530	543	585	643	672	698	703

GRAPE GROWERS BY REGION	AUCK	WAIK	GISB	HB	WAIR	NELS	MARL	WAIP	CANT	OTAGO	TOTAL
2003	13	9	89	136	29	37	254	6	19	42	634
2004	17	5	97	126	17	28	275	6	12	11	594
2005	18	7	108	168	33	40	415	7	12	17	825
2006	20	9	92	157	39	46	428	11	21	50	875
2007	25	4	100	186	25	58	530	12	4	63	1,007
2008	38	13	89	172	44	57	524	20	41	75	1,073
2009	44	11	87	171	48	62	568	22	38	77	1,128
2010	17	2	57	120	24	39	544	11	2	35	851
2011	9	2	54	103	24	38	551	6	2	35	824

NEW ZEALAND PRODUCING VINEYARD AREA (2003-2012)

BY GRAPE VARIETY (HA)	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Sauvignon Blanc	4,516	5,897	7,277	8,860	10,491	13,988	16,205	16,910	16,758	17,297
Pinot Noir	2,624	3,239	3,757	4,063	4,441	4,650	4,777	4,773	4,803	4,828
Chardonnay	3,515	3,617	3,804	3,779	3,918	3,881	3,911	3,865	3,823	3,792
Merlot	1,249	1,487	1,492	1,420	1,447	1,363	1,369	1,371	1,386	1,403
Riesling	653	666	811	853	868	917	979	986	993	1,009
Pinot Gris	316	381	489	762	1,146	1,383	1,501	1,763	1,725	1,764
Cabernet Sauvignon	741	687	614	531	524	516	517	519	519	521
Gewürztraminer	197	210	257	284	293	316	311	314	313	290
Syrah	134	183	211	214	257	278	293	297	299	300
Semillon	257	306	240	229	230	199	201	185	182	184
Cabernet Franc	180	213	180	164	168	166	163	161	161	162
Malbec	152	168	163	155	160	156	156	157	157	161
Muscat Varieties	134	136	139	140	139	135	135	125	125	122
Müller Thurgau	256	155	137	116	106	79	79	78	78	74
Pinotage	82	82	85	90	88	74	74	74	74	68
Chenin Blanc	108	72	58	59	50	50	50	47	47	47
Reichensteiner	59	61	59	61	66	72	72	72	72	72
Other & Unknown	627	552	1,229	836	963	1,087	1,171	1,731	1,885	1,306
TOTAL**	15,800	18,112	21,002	22,616	25,355	29,310	31,964	33,428	33,400	33,400

BY REGION (HA)	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Auckland/Northland	461	591	514	504	533	534	543	550	556	573
Waikato/Bay of Plenty	142	151	148	150	145	147	147	147	147	147
Gisborne	1,885	1,810	1,890	1,913	2,133	2,142	2,149	2,083	2,072	2,003
Hawke's Bay	3,702	3,873	4,249	4,346	4,665	4,899	4,921	4,947	4,993	5,046
Wairarapa	595	737	779	777	827	855	859	871	882	885
Marlborough	6,831	8,539	9,944	11,488	13,187	15,915	18,401	19,295	19,024	19,570
Nelson	485	548	646	695	782	794	813	842	861	880
Canterbury/Waipara	601	641	853	925	1,034	1,732	1,763	1,779	1,809	1,828
Central Otago	703	844	978	1,253	1,415	1,552	1,532	1,540	1,540	1,543
Other & Unknown	395	378	1,001	565	634	770	836	1,374	1,516	925
TOTAL**	15,800	18,112	21,002	22,616	25,355	29,310	31,964	33,428	33,400	33,400

* Forward estimate from 2009 Vineyard Survey

** Total corrected to account for assumed vineyard underestimation

Source: New Zealand Winegrowers' Vineyard Surveys

NEW ZEALAND VINTAGES (2003-2012)

BY GRAPE VARIETY (TONNES)	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Sauvignon Blanc	28,266	67,773	63,297	96,686	102,426	169,613	177,647	174,247	224,412	181,121
Pinot Noir	9,402	20,145	14,578	22,062	20,699	32,878	27,547	23,655	31,156	23,285
Chardonnay	15,534	35,597	29,741	26,944	38,792	33,346	34,393	26,322	25,580	22,855
Pinot Gris	836	1,888	1,655	3,675	6,053	12,417	11,410	12,810	17,787	15,347
Merlot	4,957	9,330	9,194	11,206	11,714	10,166	11,723	8,885	9,092	8,046
Riesling	3,376	5,647	4,792	6,745	6,017	8,547	6,316	5,416	6,118	4,989
Cabernet Sauvignon	3,201	4,045	3,018	2,659	2,462	2,270	2,304	2,203	1,667	1,120
Syrah	330	691	758	1,057	1,514	1,452	1,500	2,112	1,741	1,431
Gewürztraminer	529	1,325	1,164	1,532	2,052	2,101	2,123	1,556	1,836	1,249
Semillon	2,192	3,511	2,388	2,664	2,929	2,561	1,667	1,362	689	596
Viognier			155	176	543	573	784	854	781	839
Muscat Varieties	1,242	1,828	2,098	1,532	2,017	1,697	1,505	793	550	578
Malbec	458	1,106	763	1,325	1,086	1,036	972	761	764	694
Other Red Vinifera	221	400	459	262	227	291	262	602	556	307
Cabernet Franc	602	858	782	673	819	688	735	552	488	414
Pinotage	588	917	708	631	890	719	694	467	476	292
Reichensteiner	644	1,140	675	762	512	681	0	410	158	194
Other White Vinifera	330	668	360	344	415	247	249	248	543	342
Arneis										163
Chenin Blanc	391	1,325	629	337	212	151	93	79	78	80
Müller Thurgau	1,685	3,888	2,144	1,573	1,437	847	506	81	77	2
All Hybrids	38	17	47	40	8	69	17	30	42	1
SURVEY TOTAL	74,821	162,100	139,406	182,885	202,823	282,352	282,447	263,445	324,591	263,944
INDUSTRY TOTAL*	76,400	165,500	142,000	185,000	205,000	285,000	285,000	266,000	328,000	269,000

BY REGION (TONNES)	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Northland	182	144	183	208	203	204	148	178	111	92
Auckland	715	1,497	948	1,345	1,241	1,604	1,615	1,325	1,464	1,220
Waikato/Bay of Plenty	497	457	210	261	212	192	202	118	51	7
Gisborne	14,350	25,346	22,493	18,049	26,034	23,911	23,093	18,316	14,450	15,590
Hawke's Bay	10,832	30,429	28,098	33,287	41,963	34,284	40,985	38,860	35,533	32,793
Wairarapa	1,311	2,820	1,649	3,008	1,949	4,105	4,421	3,942	3,598	4,271
Marlborough	40,537	92,581	81,034	113,436	120,888	194,639	192,128	182,658	244,893	188,649
Nelson	3,149	4,563	2,454	5,623	5,190	7,002	7,740	5,963	7,854	6,129
Canterbury/Waipara	1,422	2,825	895	3,051	1,699	6,881	5,476	5,870	9,485	7,079
Central Otago	1,825	1,439	1,441	4,612	3,434	9,495	6,218	6,196	7,104	8,115
Other				6			421	19	49	0
SURVEY TOTAL	74,821	162,100	139,406	182,885	202,823	282,352	282,447	263,445	324,591	263,944
INDUSTRY TOTAL*	76,400	165,500	142,000	185,000	205,000	285,000	285,000	266,000	328,000	269,000

* 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 'Total' and 'Industry Total' is data from wine companies who did not respond to the Vintage Survey

Source: New Zealand Winegrowers' Annual Vintage Surveys

NEW ZEALAND WINE EXPORTS BY MARKET (2003-2012)

		2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Australia	L	4.661	5.654	9.762	13.180	18.632	24.633	37.343	45.937	45.263	53.474
	NZ$	51.621	56.285	88.033	122.441	179.933	246.696	323.312	327.098	337.740	380.473
United Kingdom	L	12.258	13.864	21.124	21.907	27.573	29.646	36.212	47.995	52.930	57.657
	NZ$	113.729	119.786	162.120	166.937	227.418	240.730	267.913	298.656	293.631	284.021
USA	L	5.578	7.266	12.975	14.411	18.712	19.492	22.181	26.360	32.223	39.481
	NZ$	67.390	80.026	113.237	138.411	175.515	159.787	223.666	211.613	231.922	251.329
Canada	L	0.988	0.700	1.477	2.061	3.182	5.219	5.055	7.143	5.705	6.509
	NZ$	10.351	6.934	13.907	21.888	33.870	47.060	49.498	59.141	59.180	70.906
Netherlands	L	0.525	0.487	1.716	1.217	1.559	1.363	2.354	2.746	4.060	4.586
	NZ$	5.058	4.404	12.688	10.017	13.318	12.808	20.831	21.576	27.369	26.744
China	L	0.016	0.032	0.050	0.124	0.204	0.238	0.544	1.425	1.489	2.200
	NZ$	0.209	0.298	0.540	1.227	2.124	2.436	6.130	17.165	16.872	25.234
Hong Kong	L	0.163	0.225	0.301	0.358	0.444	0.610	0.624	0.947	1.307	1.524
	NZ$	1.962	2.209	2.992	3.428	4.528	6.171	8.870	11.951	17.629	18.393
Ireland	L	0.423	0.461	0.573	0.844	0.853	1.496	1.498	1.816	1.844	2.158
	NZ$	4.141	4.307	5.200	8.158	8.920	15.012	16.501	15.784	15.643	16.326
Singapore	L	0.120	0.137	0.292	0.439	0.474	0.756	1.000	1.031	1.164	1.149
	NZ$	1.723	2.009	3.556	4.401	5.996	9.507	13.370	12.464	13.984	14.515
Japan	L	0.326	0.426	0.491	0.406	0.484	0.545	0.504	0.674	0.897	1.119
	NZ$	4.423	5.967	5.903	5.855	6.665	7.299	7.837	9.026	11.017	12.891
Sweden	L	0.211	0.228	0.087	0.235	0.516	0.545	0.604	0.942	1.367	1.459
	NZ$	1.709	1.889	0.935	2.333	5.033	5.445	6.105	8.747	11.365	11.554
Germany	L	0.220	0.175	0.307	0.301	0.382	0.462	0.530	0.586	0.748	1.429
	NZ$	2.900	2.446	3.289	2.914	3.699	5.342	5.680	4.954	5.302	7.639
Denmark	L	0.460	0.443	0.527	0.508	0.654	0.654	1.019	1.013	0.976	1.004
	NZ$	4.524	4.019	4.608	4.656	6.029	5.836	6.510	5.946	6.646	6.566
Finland	L	0.066	0.041	0.099	0.111	0.134	0.121	0.122	0.164	0.276	0.219
	NZ$	0.643	0.433	1.071	1.161	1.428	1.202	1.502	1.528	2.532	2.134
Norway	L	0.000	0.004	0.021	0.014	0.037	0.033	0.069	0.068	0.169	0.205
	NZ$	0.000	0.042	0.219	0.087	0.338	0.337	0.621	0.623	1.529	1.483
Others	L	0.914	1.400	2.098	2.183	2.184	2.822	2.987	2.010	4.243	4.706
	NZ$	11.453	15.563	21.166	32.161	23.488	32.129	33.374	23.358	41.614	46.638
TOTAL	L	27.114	31.101	51.373	57.791	76.024	88.636	112.647	142.032	154.661	178.880
	NZ$	281.838	302.599	434.856	512.362	698.303	797.797	991.721	1,040.529	1,093.973	1,176.847

Note: All figures are in millions
Source: Statistics New Zealand

%

NEW ZEALAND WINE EXPORTS BY MARKET (YEAR END JUNE 2012)

		WHITE 750ML	WHITE OTHER	**WHITE TOTAL**	RED 750ML	RED OTHER	**RED TOTAL**	SPARKLING	FORTIFIED	**TOTAL**
Australia	L	32.833	15.966	48.799	3.441	0.446	3.888	0.787		53.474
	NZ$	283.164	43.037	326.201	43.613	2.348	45.962	8.305	0.005	380.473
	NZ$/L	8.62	2.70	6.68	12.67	5.26	11.82	10.56	110.69	7.12
United Kingdom	L	26.163	26.614	52.777	3.776	0.579	4.355	0.524		57.657
	NZ$	172.009	69.036	241.045	35.843	2.380	38.222	4.752	0.002	284.021
	NZ$/L	6.57	2.59	4.57	9.49	4.11	8.78	9.06	32.28	4.93
U.S.A	L	23.233	14.147	37.380	2.040	0.033	2.073	0.028		39.481
	NZ$	175.753	51.550	227.303	23.345	0.302	23.648	0.376	0.003	251.329
	NZ$/L	7.56	3.64	6.08	11.44	9.15	11.41	13.47	65.77	6.37
Canada	L	5.494	0.253	5.747	0.735		0.735	0.026		6.509
	NZ$	60.264	0.628	60.892	9.641	0.003	9.644	0.371		70.906
	NZ$/L	10.97	2.48	10.60	13.11	9.44	13.11	14.07		10.89
Netherlands	L	3.076	1.056	4.133	0.379	0.060	0.439	0.014		4.586
	NZ$	19.303	3.392	22.695	3.524	0.380	3.903	0.146		26.744
	NZ$/L	6.27	3.21	5.49	9.30	6.34	8.89	10.37		5.83
China	L	0.811	0.015	0.827	1.343	0.023	1.365	0.008		2.200
	NZ$	9.089	0.120	9.209	15.643	0.264	15.907	0.111	0.006	25.234
	NZ$/L	11.20	7.78	11.14	11.65	11.72	11.65	13.62	391.93	11.47
Hong Kong	L	1.115	0.016	1.131	0.383	0.003	0.386	0.007		1.524
	NZ$	11.353	0.072	11.425	6.816	0.047	6.863	0.103	0.006	18.363
	NZ$/L	10.19	4.49	10.11	17.81	13.53	17.77	14.71	8.31	12.07
Ireland	L	1.925		1.925	0.209		0.209	0.025		2.158
	NZ$	14.062		14.062	2.023		2.023	0.242		16.326
	NZ$/L	7.31		7.31	9.68		9.68	9.68		7.56
Singapore	L	0.837		0.837	0.299	0.001	0.299	0.001		1.149
	NZ$	9.837	0.012	9.849	4.463	0.010	4.473	0.193		14.515
	NZ$/L	11.76	98.74	11.77	14.94	14.16	14.93	14.83		12.63
Japan	L	0.655	0.009	0.664	0.442	0.005	0.447	0.007		1.119
	NZ$	7.208	0.098	7.305	5.436	0.056	5.491	0.094		12.891
	NZ$/L	11.00	11.32	11.00	12.30	10.20	12.27	12.79		11.52
Sweden	L	1.185		1.185	0.212		0.212	0.001	0.060	1.459
	NZ$	9.080		9.079	2.345		2.345	0.010	0.120	11.554
	NZ$/L	7.66		7.66	11.05		11.05	9.56	2.00	7.92
Germany	L	0.574	0.767	1.342	0.079		0.079	0.008		1.429
	NZ$	4.077	2.382	6.459	1.123	0.001	1.124	0.057		7.639
	NZ$/L	7.10	3.10	4.81	14.15	26.72	14.15	6.85		5.35
Denmark	L	0.475	0.385	0.860	0.144		0.144			1.004
	NZ$	3.897	1.044	4.940	1.626		1.626			6.566
	NZ$/L	8.21	2.71	5.74	11.29		11.29			6.54
Finland	L	0.173		0.173	0.040		0.040	0.007		0.219
	NZ$	1.620		1.620	0.474		0.474	0.040		2.134
	NZ$/L	9.37		9.37	11.82		11.82	6.09		9.72
Norway	L	0.124	0.048	0.172	0.028		0.028	0.006		0.205
	NZ$	0.942	0.168	1.110	0.342		0.342	0.031		1.483
	NZ$/L	7.60	3.50	6.46	12.28		12.28	5.55		7.22
Others	L	3.349	0.439	3.787	0.767	0.033	0.800	0.115	0.003	4.706
	NZ$	32.950	1.731	34.681	9.991	0.388	10.380	1.458	0.119	46.638
	NZ$/L	9.84	3.95	9.16	13.03	11.67	12.97	12.63	40.38	9.91
TOTAL	L	102.022	59.716	161.738	14.318	1.184	15.501	1.577	0.063	178.880
	NZ$	814.608	173.270	987.877	166.247	6.178	172.425	16.289	0.256	1,176.847
	NZ$/L	7.98	2.90	6.11	11.61	5.22	11.12	10.33	4.04	6.58

Note: L and NZ$ figures are in millions

Source: Statistics New Zealand

NEW ZEALAND WINE EXPORTS BY VARIETY (2006-2012)

	2006	2007	2008	2009	2010	2011	2012
Sauvignon Blanc	42.804	56.555	66.849	91.527	115.810	131.653	150.883
Pinot Noir	4.151	5.882	5.703	6.183	8.207	9.498	10.560
Chardonnay	4.011	4.230	5.541	4.789	5.234	4.888	5.510
Pinot Gris	0.255	0.608	1.256	2.036	2.769	2.648	4.091
Merlot	0.904	1.501	1.876	1.931	2.618	2.347	2.379
Sparkling	2.290	2.283	2.064	1.976	1.737	1.271	1.392
Cabernet or Merlot Blend	0.972	0.942	1.072	1.067	1.022	1.094	1.254
Generic White	0.911	0.831	0.700	1.117	0.991	0.532	0.719
Riesling	0.765	0.928	1.003	0.776	0.971	1.062	1.057
Rosé	0.597	1.144	0.963	0.704	0.559	0.622	0.586
Chardonnay Blend	0.014	0.010	0.159	0.208	0.426	0.415	0.149
Syrah	0.018	0.084	0.137	0.155	0.227	0.307	0.309
Gewürztraminer	0.126	0.162	0.131	0.146	0.162	0.306	0.202
Sauvignon Blend	0.130	0.055	0.024	0.128	0.154	0.077	0.140
Other White Varietals	0.438	0.179	0.039	0.081	0.069	0.076	0.118
Generic Red	0.771	0.252	0.082	0.035	0.068	0.022	0.021
Other Red Varietals	0.097	0.107	0.089	0.049	0.060	0.087	0.095
Cabernet Sauvignon	0.006	0.017	0.015	0.014	0.043	0.020	0.030
Sweet Wines	0.056	0.078	0.043	0.034	0.027	0.039	0.055
Fortified	0.040	0.038	0.026	0.030	0.011	0.001	0.001
Chenin Blanc	0.011	0.018	0.008	0.009	0.010	0.017	0.013
Semillon	0.055	0.009	0.013	0.003	0.001	0.008	0.002
Sparking Sauvignon		0.000	0.000	0.000	0.000	0.000	0.217
TOTAL*	59.421	75.913	87.793	113.000	141.139	156.990	179.783

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

Note: All figures are in millions of litres

Source: Wine Export Certification Service

WINE IMPORTS INTO NEW ZEALAND (2003-2012)

BY COUNTRY OF ORIGIN	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Australia	32.363	27.636	24.340	27.250	36.497	22.412	20.019	26.502	22.512	21.897
South Africa	6.172	9.648	6.151	3.385	0.768	10.414	7.594	5.860	1.710	1.694
Chile	2.594	2.319	0.668	1.038	0.953	2.593	0.858	0.102	0.062	0.530
Italy	1.105	1.380	1.632	1.614	1.850	2.312	1.523	1.067	0.995	0.858
France	1.241	1.220	0.903	1.132	1.157	1.990	1.872	0.984	1.095	1.449
Spain	0.362	0.708	0.404	0.393	0.494	0.486	0.493	0.207	0.230	0.311
Argentina	0.181	0.713	0.890	0.765	0.371	0.362	0.380	0.053	0.051	0.082
Others	0.352	1.401	0.884	0.317	0.288	0.381	0.605	0.283	0.631	0.511
TOTAL	44.373	45.025	35.872	35.894	42.378	40.949	33.344	35.059	27.287	27.331

BY PRODUCT TYPE	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
White	18.803	23.160	16.328	17.108	21.251	17.014	11.312	13.773	8.005	7.555
Red	21.936	17.739	15.710	15.972	18.241	20.763	18.633	18.475	16.012	17.011
Sparkling	2.895	3.575	3.365	2.287	2.309	2.444	2.762	2.376	2.760	2.008
Champagne	0.290	0.385	0.376	0.415	0.438	0.609	0.559	0.381	0.447	0.679
Fortified	0.447	0.166	0.093	0.112	0.138	0.119	0.077	0.054	0.063	0.078
TOTAL	44.373	45.025	35.872	35.894	42.378	40.949	33.344	35.059	27.287	27.331

Note: All figures are in millions of litres

WINE IMPORTS INTO NEW ZEALAND (YEAR END JUNE 2012)

COUNTRY OF ORIGIN		WHITE	RED	SPARKLING	FORTIFIED	TOTAL
Australia	L	6,337,015	14,197,488	1,315,990	46,161	21,896,654
	$	14,816,542	61,622,447	6,970,663	1,159,983	84,569,635
South Africa	L	688,754	875,042	129,881	106	1,693,783
	$	2,419,106	3,193,633	636,399	3,866	6,253,004
Chile	L	40,491	488,603	698	-	529,792
	$	181,990	1,356,495	15,206	-	1,553,691
Italy	L	68,377	513,609	273,991	1,710	857,687
	$	500,809	3,181,127	2,247,638	72,817	6,002,391
France	L	146,714	576,917	724,350	1,350	1,449,331
	$	2,272,888	8,351,545	27,009,535	115,725	37,749,693
Spain	L	23,576	222,006	57,145	7,787	310,514
	$	207,257	1,240,128	312,568	380,378	2,140,331
Argentina	L	3,051	78,484	450	-	81,985
	$	15,672	452,054	3,045	-	470,771
Others	L	247,483	59,021	184,345	20,401	511,250
	$	1,359,822	719,573	1,279,314	1,219,465	4,578,174
TOTAL	L	7,555,461	17,011,170	2,686,850	77,515	27,330,996
	$	21,774,086	80,117,002	38,474,368	2,952,234	143,317,690

Note: All figures are in millions
Source: Statistics New Zealand

WINERIES	NZW	WINZ
CATEGORY ONE		
Steve Green Carrick	Deputy Chair	Chair
Mike Spratt Destiny Bay	Member	Member
Judith Mundy Fowler Puriri Hills	Alternate	Alternate
CATEGORY TWO		
Kate P Radburnd C J Pask Winery	Member	Deputy Chair
Blair Gibbs Spy Valley	Member	Member
Peter Holley Mission Estate Winery	Alternate	Alternate
CATEGORY THREE		
Joe Stanton Constellation New Zealand	Member	Member
Fabian Partigliani Pernod Ricard New Zealand	Member	Member
Sir George Fistonich Villa Maria Estate	Member	Member
Jim Delegat Delegat's Wine Estate	Alternate	Alternate

GRAPEGROWERS	NZW	NZGGC
Stuart Smith	Chair	President
Mal McLennan	Member	Vice-President
Garth Edwards North Island Minor Regions	Alternate	Member
John Clarke Gisborne	Member	Member
Doug Bell Gisborne	Alternate	Member
Xan Harding Hawke's Bay	Alternate	Member
Chris Howell Hawke's Bay	Member	Member
Dominic Pecchenino Marlborough	Member	Member
Richard Rose Marlborough	Alternate	Member
Gwyn Williams South Island Minor Regions	Alternate	Member

CHAIRS OF THE BOARD OF DIRECTORS

NEW ZEALAND WINEGROWERS (NZW)

2002-2004	Peter V Hubscher MNZM
2004-2006	Brian J Vieceli
2006-Present	Stuart Smith

WINE INSTITUTE OF NEW ZEALAND (WINZ)

1975-1979	Alexander A Corban OBE, BSc, RDOen
1979-1980	George T Mazuran OBE, JP
1980-1982	Thomas B McDonald OBE, JP
1982-1985	Mate G Brajkovich OBE
1985-1991	Bryan W Mogridge ONZM, BSc
1991-1996	John Buck OBE
1996-1999	Ross R Spence QSO
1999-2004	Peter V Hubscher MNZM
2004-2006	Brian J Vieceli
2006-2008	Sir George Fistonich
2008-Present	Steve Green

PRESIDENTS OF THE NEW ZEALAND GRAPE GROWERS COUNCIL (NZGGC)

1979–1984	Bill Walsh
1984–1994	Ross Goodin
1994–1999	Kevyn Moore QSM
1999–2003	William Crosse
2003–2005	John Webber
2005-2006	Ian Miller
2006-Present	Stuart Smith

ROLL OF FELLOWS

NEW ZEALAND WINEGROWERS

2006	Ross R Spence QSO
2006	Reid Fletcher
2008	Tim Finn
2008	John Webber

WINE INSTITUTE OF NEW ZEALAND

1982	George T Mazuran OBE, JP
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"I MUST ADMIT THERE WERE MANY TIMES WHEN I CLOSED MY EYES WHILST TASTING AND IT TOOK ME RIGHT BACK TO BURGUNDY. I JUST DON'T THINK NEW ZEALAND REALISE WHAT THEY HAVE HERE, THE CLIMATE HERE MAKES ELEGANT, DIVINE CHARDONNAY WITH GREAT LONGEVITY."

RUTH YATES — WWW.CORKSOUT.COM, UK, MARCH 2012

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