

NEW ZEALAND  
WINEGROWERS INC

# Annual Report

2018



NEW ZEALAND WINE  
PURE DISCOVERY

**Vision**

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

**Mission**

To create enduring value  
for our members

**Purpose**

To protect the competitive  
position of our wine from  
New Zealand

To support the sustainable  
and profitable growth of  
our wine from New Zealand

**Activities**

Advocacy/Research/  
Marketing/Sustainability





**NEW ZEALAND WINEGROWERS INC**  
**ANNUAL REPORT 2018**

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**02 Chair's Report**



**08 Advocacy**



**14 Research**



**20 Information Resources**



**22 Sustainability**



**26 Marketing**



**31 Wine Awards**



**33 Financials**



**36 Statistics**



**45 Directory**

Industry Boards  
Industry Organisations  
New Zealand Winegrowers' Key Contacts

## Chair's Report

**“We’ve steadily built a reputation for consistent quality; for wine that is approachable, distinctive and noteworthy; and for a comprehensive commitment to sustainability.”**



**\$1.7 Billion → total value of exports**



## In the year ended 30 June 2018 the value of New Zealand wine exports grew, for the 23rd year in a row, by 2.5% to reach \$1.7 billion.

### The secret of our success

We've steadily built a reputation for consistent quality; for wine that is approachable, distinctive and noteworthy; and for a comprehensive commitment to sustainability - which is embedded in our Purpose and everything we do.

These are qualities that resonate with wine drinkers around the world. Those who dig a little deeper discover the secret of that success lies in the intersection of our people, our unique winegrowing places, and our island climate. The lucky ones who come here to experience our flourishing wine tourism offerings leave with a fond appreciation of what makes each glass of New Zealand wine so special.

As a result of this success, New Zealand wine's contribution to the domestic economy is notable. The sector now contributes over 20,000 jobs, and wine tourism is attracting a growing number of high-value tourists to our regions.

### Vintage 2018

On the back of plentiful global opportunities, the country's productive vineyard area continues to grow, increasing by an additional 2% to reach 37,969 hectares. Vines planted but not yet producing indicate vineyard area growth of just over 1% for each of the next two years.

With an early start to flowering and a holiday-maker's dream summer, wineries entered 2018 with stocks low, and their fingers crossed for a larger crop after the smaller 2017 harvest.

By the time the vines were bare, the national harvest came in at 419,000 tonnes, 6% above 2017, but down on expectations. Average yield was slightly up at 11.1 tonnes per hectare. Due to increasing demand, wineries will need to carefully manage their stocks to keep their export market customers supplied, and export growth will again be constrained in 2018.

Despite a smaller than anticipated harvest, the favourable growing conditions give us confidence that vintage 2018 will deliver the exciting flavour profiles for which our cool climate New Zealand wines are renowned. Pinot Noir and Merlot each recorded significant production increases under good conditions, which bodes well for our red wines over the coming years.

### Charting our future

In 2011, the Board's strategic review of New Zealand Winegrowers identified the need for structural changes to the organisation to better reflect the New Zealand wine industry. The results included: 2016's merger of the New Zealand Grape Growers Council and the New Zealand Wine Institute to form New Zealand Winegrowers Inc; changes to our levy and governance and management structures; and a clearly articulated vision.

Six years on, with those changes now embedded, the Board decided the time is right for a new strategic review - one with a more outward-looking focus on the future of the industry. Pricewaterhouse Coopers has been engaged with a broad mandate to understand the opportunities and challenges for winegrowers, and help us chart a direction that will best enable us to fulfil New Zealand Winegrowers' mission of creating enduring value for our members.



**The New Zealand Wine Awards will have a broad focus, celebrating not just our best wines, but also the people that make our industry so special, and the sustainable practices and beautiful places our wine comes from.**

The key issues PwC will be exploring – through on-line questionnaires to all members, and in interviews with winegrowers, regional associations, and a range of other stakeholders – include:

- How should the industry celebrate its successes?
- Is there current or future consumer and market value in sustainability? What should the industry's sustainability priorities be?
- What are the major changes and impacts of rapidly changing markets?
- How are business models evolving in the industry and what are the implications?
- At what point will Marlborough be fully planted? How will this impact the industry and markets? What new opportunities and strategies will be available to and/or required of growers and wineries?
- Is there a need for further evolution of the relationship between NZW and regional organisations? What are the options for that?
- What is the impact of the changing market and other conditions on industry research needs? What is the optimal governance structure that should be adopted for the NZW Research Centre?
- How could technology changes and trends impact NZ wine demand and supply?
- What is the impact of potential policy, legislative and regulatory changes on the industry? What pre-emptive actions does the industry need to take to help shape the regulatory agenda?
- What other major risks could impact supply? What is the appropriate response for New Zealand Winegrowers to help prepare for these risks?
- Given the latest trends, supply and demand factors, and other potential risks facing the industry, what are the implications for the role, purpose, priorities, structure, funding and KPIs of New Zealand Winegrowers?

The results of this review should give us insights into opportunities and threats, and steps the industry can take to become more sustainable, stronger, more successful and more resilient.

The first phase of the review – into how the wine industry celebrates success – has already been completed. As a result of members' feedback and the initial report's recommendations, we will host the annual New Zealand Wine Awards in November 2018. These awards will combine the best elements of our previous awards (the former Air New Zealand Wine Awards and the Bragato Wine Awards) into a single event.

The New Zealand Wine Awards will have a broad focus, celebrating not just our best wines, but also the people that make our industry so special, and the sustainable practices and beautiful places our wine comes from.

The full Strategic Review will be completed and reported to the Board in October, with the results then communicated to members in a series of regional meetings around the country.

**Building capability**

The growth of many sectors across New Zealand's economy means that tourism, construction, hospitality and other primary sector industries are all competing for the same workforce. The Ministry for Primary Industries has predicted New Zealand's primary industries will collectively require an additional 50,000 workers by 2030 to support forecast growth.

This presents a multifaceted challenge for our industry, for which there is no silver bullet.

As part of our Labour Strategy, over the coming months New Zealand Winegrowers will develop a Workforce Capability and Development Plan to identify what we and the industry can most effectively do to help our members attract, retain and train the workers they need.

With high national demand for talented staff, and growing international supplier pressure to verify that workers are being properly respected, we anticipate keen interest in the new People Pillar of the Sustainable Winegrowing New Zealand Continuous Improvement programme. In addition to outlining minimum requirements, it describes a range of best practice, sustainable options for ensuring our members have a positive impact on their workers and local communities.

This year we helped secure a welcome increase of 600 in the number of Recognised Seasonal Employer (RSE) scheme positions, bringing the total New Zealand pool of these critical seasonal workers, across all industries, to 11,100. Although there were some challenges in turning that increase into workers in vineyards, indications seem positive that labour will generally be in the right places this winter to complete pruning before spring arrives. We also advocated for changes to make the process for allocating workers more transparent and equitable; an operational review of the RSE scheme is scheduled to begin shortly.

### **Connect – Inform – Change**

That is the motto of the new Women in Wine programme launched at Bragato in August 2017 to provide a network to celebrate, support and grow the role of women in our industry. Board member Katherine Jacobs chairs the initiative, and a national committee has been formed with each region represented.

Most regions have held local events which have been well attended, with attendance increasing as word about Women in Wine spreads.

In June 2018 a Women in Wine Pilot Mentoring programme was launched. The response was very good and eight strong matches have been made around the country. The plan is to roll out the next mentoring programme at the beginning of 2019.

### **Not welcome here**

During the year we learned that the cattle disease, *Mycoplasma bovis*, had arrived in New Zealand. The government estimates the cost of eradicating this disease will be \$870 million over ten years. If ever the New Zealand primary sector needed a wake-up call to the importance of keeping biosecurity threats out, and of identifying and responding to them, this was it.

In last year's Annual Report we noted that NZW had recently signed the Government Industry Agreement for Biosecurity Readiness and Response (GIA). Under that agreement the wine industry agrees to share the cost of grapevine biosecurity readiness and response activities with the government, in exchange for increased information across the biosecurity system and decision-making rights for readiness and response.

This year, the benefit of the GIA was clear: in March quarantine officers identified hundreds of our most unwanted pest – brown marmorated stink bugs – on several inbound car-carrier ships. They took immediate and appropriate action to minimise or eliminate the risk to growers. In all, four car-carrier ships were diverted or required by MPI to leave New Zealand ports. In each case NZW was kept informed of the risks and responses being taken.

Throughout the year, several other post border detections of this pest were identified and effectively dealt with. NZW's participation in the GIA gives us significantly better ability to participate in decision-making about how biosecurity risks should be managed, ensure that lessons are learned, and better inform and prepare our members.

These detections highlight the need for our growers to be kept up to date of changing biosecurity risks, and to implement biosecurity activities in the vineyard. To support these essential activities, an additional NZW biosecurity staff member will be employed this coming year.

### **Protecting and promoting open access to markets**

A level of biosecurity risk from inbound shipping is an unavoidable consequence of trade. Similarly, a key component of New Zealand's economic risk is the fact we are a small nation of producers and traders sitting at the bottom of the world.

By ourselves New Zealand has little power to influence the shape of the global trading system, yet we are critically dependent on it. The power New Zealand does have is "soft power"; credibility as a leading good citizen in the rules-based trading system that has developed since the Second World War. Unfortunately, that rules-based system, which has protected us from exploitation and bullying by larger economies, now seems under threat.

Although New Zealand wine may not be an immediate or direct target of any trade war, we may suffer some harm. This may come from tariff hikes or non-tariff barriers that are applied to us without cause. It may come from increased global uncertainty closing off potential new growth opportunities. Or it may simply be that our trading partners react to their own trade stresses by becoming more self-centred and protectionist. The fact New Zealand does not have a Free Trade Agreement with either the US or the EU leaves us even more exposed.

On members' behalf, New Zealand Winegrowers is focussed on understanding and anticipating these trade risks to help position the industry to respond if they eventuate:

- We engage with government ministers, politicians and officials to ensure they know of our concerns, and that we expect them to continue New Zealand's role as a leading international advocate of the rules-based trading system;
- We actively support government efforts to deepen international commitment to the rules-based trading system, both through trade agreements such as the CPTPP, agreements with the EU and UK, the Pacific Alliance, and RCEP, and through using those rules – for example, our strong support for New Zealand participation in World Trade Organisation challenges protesting the favourable treatment that Canada gives its domestic wine at the expense of imported wine;
- We promote adherence to a rules-based trading system by working closely with intentional wine regulatory colleagues, both bilaterally and through bodies such as the World Wine Trade Group, the International Organisation of Vine and Wine, the APEC Wine Regulatory Forum, and FIVS; and
- We keep engaged in the domestic trade policy-setting agenda, both on our own and in concert with like-minded parties such as the International Business Forum, of which we are a member.

New Zealand and its wine industry have weathered difficult changes in market regulation and global trading structures before, and ultimately we have prospered from them. New Zealand Winegrowers' engagement on trade matters on behalf of its members will help ensure we can do so again.

### Putting it out there

Preparing and distributing timely, accurate information to New Zealand's winegrowers is one of the most important ways we create value for our members. This year, in addition to our monthly newsletter and member website content, we produced and distributed numerous publications including subject guides, market data reports, research reports, factsheets, and one-off alerts. Our 2018 Grape Days series had record attendance, with over 800 members meeting in three centres. Similarly, our 2017 Bragato conference was well attended and well received. But we are never content to rest on our laurels; if there is a new subject on which you think New Zealand Winegrowers could usefully provide information or guidance to members, let us know.

### Wine tourism is booming

A major focus in the Marketing area this year has been the establishment of wine tourism as an activity of focus. 27% of all holiday visitors to New Zealand visit a winery and those that do spend 52% more than average tourists, they stay longer and visit more regions. Overall they spend \$3.8 billion – the challenge is for us to help wineries create products and experiences that mean more of that money flows to our members.

A real focus of our Visit and Education programmes has been the 36 sommeliers that came to two Sommits™ in Nelson and Central Otago – they are currently rolling out their learnings to hundreds of the top sommeliers in their home cities.

Another key achievement this year was a very successful social media campaign around International Sauvignon Blanc Day. This reached 88.8 million social media feeds, an increase of 58% on 2017.

### Being straight with our consumers

Because of increasing exports and a smaller 2017 harvest, wine imports to New Zealand increased this year. For a handful of value brands, there was uncomfortable media attention focussed on whether they were being transparent enough about their use of imported wine under a familiar "Kiwi" brand. We supplemented the existing member guidance in our Labelling Guide with a new guide – Representations of origin for wines sold in New Zealand – to highlight legal requirements and best practice to ensure that New Zealand consumers are in no doubt about the regional origins of the wine they are buying.

#### Representations of origin on wine sold in New Zealand: the key principles

All wine sold in New Zealand must clearly state on the container the country or countries of origin of any of the contents.

For wine labelled as New Zealand wine or bearing a New Zealand registered Geographical Indication:

- 100% of the wine must be from New Zealand
- At least 85% of the wine must be from the region(s), variety(s) and vintage(s) that appears on the label – eg if labelled "2015 Central Otago Pinot Noir", 85% of the wine must be from 2015 Pinot Noir grapes, grown in Central Otago.

Representations of origin, including all of the context, must not be misleading. In other words, they must leave a reasonable consumer with a fair and accurate impression of where the wine is from.



### Leading the “UN of wine”

Many members will know Dr John Barker, who for ten years was New Zealand Winegrowers’ General Counsel. The New Zealand government has nominated Dr Barker for election as the Director General of the International Organisation of Wine and Vine (OIV) – sometimes called the “UN of Wine” – for the next five years. John’s election would make him the first ever non-European leader in the nearly 100 year history of this body; as Director General he would help ensure the organisation can reinforce its position as the trusted vine and wine reference body in a rapidly changing world.

New Zealand Winegrowers and the Ministry of Foreign Affairs and Trade have supported the candidacy throughout an intense campaign in which he visited 27 of the 46 countries that are members of the OIV. More than half of the member states supported John in the first round of the elections, and we wish him every success in the next round in September.

### Water and environment

Integral to our focus on sustainability, water – access to it, supply, use and quality – is increasingly becoming an important topic of discussion. The issues raised can be complex, but the story we have to tell as winegrowers is overwhelmingly positive: we use water sustainably; we fertilise sparingly; the quality of water under our vines typically exceeds drinking standards; and we constantly strive to improve the quality and sustainability of our practices. This is a message we will be continuing to emphasise this coming year.

Regional councils are required to implement Farm Environmental Management Plan (FEMP) rules by 2025 as a way to monitor and manage water, nutrient, soil, waste and other environmental management outcomes. Because our members already provide detailed environmental data within the audited Sustainable Winegrowing New Zealand system, we will be working with councils to see if we can leverage SWNZ data to satisfy or simplify what growers must do to comply with FEMP rules in the future.

### Transforming the grape and wine industry

The New Zealand Winegrowers Research Centre is up and running. Announced in late 2016 with a grant of up to \$12.5m from the government, the research centre is a national grape and wine research centre based in Marlborough, established as a subsidiary of New Zealand Winegrowers.

The Board has moved carefully and deliberately, determining that the research centre must be created as an enduring, sustainable operation to transform the New Zealand grape and wine industry through research, innovation and knowledge transfer.

Mark Gilbert, as the independent Chair, leads the Research Centre Board, and MJ Loza has been appointed as the CEO to lead the centre’s management. New research projects are under way, and in coming months we expect to be able to announce details of the work programme for the next few years.

### Board changes

In September this year we will hold a NZW Board election for five Levy Class Directors.

It is important that Board members are the people members think will best lead the industry forward. Every member is entitled to vote, and we very strongly urge you to participate. Watch out for voting information in your email inbox at the start of September.

Finally, on behalf of all members, we would like to express our deep gratitude to Steve Green, who stood down as Chair this year after five years chairing the New Zealand Winegrowers Board, and a further four years as Deputy Chair.

As CEO and owner of a winery and vineyard Steve brought across-the-spectrum knowledge and firsthand industry experience to the Board and whilst Chair was instrumental in achieving successful Wine and Grape Levy renewals. Steve’s inclusive style of leadership played a huge part in enabling the formation of New Zealand Winegrowers Inc. to be achieved with Board and member support. Steve continues to have interests in the industry and we wish him well with these in the future.



**John Clarke**

Chair



**Clive Jones**

Deputy Chair

## Advocacy

Protecting our members' ability to produce, market and sell competitively.



20,000 workers → employed in NZ wine sector  
46% women in workforce → gender equality

**Our activities focus on: guidance for members, product integrity standards, government engagement, intellectual property protection, growing our workers, promoting social responsibility, and encouraging free and fair trade.**



### Doing business competitively

Winegrowers just want to get on with it. But practical and regulatory hurdles can sometimes make the grape to glass journey seem like a steeplechase.

Our New Zealand Winegrowers Advocacy team focusses on identifying what's required for New Zealand's winegrowers to produce, market and sell competitively, and then providing the support, tools, and advocacy for change to make that a reality.

Whether it is rules around grape and wine production and processes, export requirements, labelling, licensing, labour, or a dozen other topics, we endeavour to provide clear and concise guidance to help our members focus on what they do best: growing grapes and making wine.

Perhaps the most visible way we do this is by preparing and regularly updating resources on important matters. This year, coverage included:

- the different laws and regulations governing winemaking practices both domestically and in overseas markets, with the International Winemaking Practices Guide acting as the key reference tool;
- the legal requirements for wine labels, both domestically and in overseas markets, summarised in our New Zealand Winegrowers Labelling Guide;
- health and safety, with the useful Working Well guide which assists members in identifying, managing and communicating health and safety risks in vineyards and wineries;

- Working for You which covers hiring employees and engaging contractors, plus a Know your Contractor section of our member website;
- the legislative and regulatory requirements that need to be considered in establishing a winery or vineyard or selling and distributing wine; clearly summarised in the New Zealand Winegrowers Legal Guide; and
- a range of other useful materials available in the "Compliance" sections of our members' website.

Our team then supplements these resources by responding to daily phone calls and email queries from members, holding seminars on relevant topics, such as our workshops on preparing for changes to the Australian Wine Equalisation Tax scheme, and by using our range of resources and contacts to help reach sensible solutions when we don't know the answer.

### Engaging to inform

We also pay careful attention to areas where change is happening or is needed. We meet frequently with members, with key government officials, and with politicians from all parties to discuss developments that might be of interest, or to request and contribute to areas of change, for the benefit of members.

For officials working in areas that relate to winegrowing, this year we ran two field trips to our wine regions. This gave them a chance to better understand our industry's contribution to New Zealand's regions, the practicalities of winegrowing, to

meet some winegrowers in person, and to ask questions relevant to their particular areas of work.

This past year, we also made formal written submissions on 30 different New Zealand and overseas government consultations (see page 12), formal oral submissions before several Select Committees and other parliamentary bodies, and made informal contributions in many more areas.

### Maintaining standards

In any sector, standards and rules protect both producers and consumers, but they are of little use unless they are enforced. During this year the first ever charges were laid alleging breaches of the 15 year-old Wine Act. Although it is disappointing that breaches have been alleged, we do not see any evidence of systematic non-compliance; rather these prosecutions are a sign that the Wine Act's framework of clear standards, strict winemaking record-keeping requirements, and independent audit of compliance is working to provide the rigorous assurances of high quality that the industry and consumers expect.

We are working with the Ministry for Primary Industries to gather better data about Wine Act compliance, so that we can help educate and protect our members by offering more comprehensive and relevant guidance.

**“Sauvignon Blanc from the country’s powerhouse region of Marlborough has led the charge, but there’s an increasingly diverse roster of other grape varieties with which to fall in love, as well as other notable wine regions worth exploring on both the North and South Islands.”**

Joe Czerwinski,  
Wine Advocate USA

### Modernising Excise

On 1 October 2018 the new Customs and Excise Act goes live. Customs has run a first class consultation process and we have represented members’ interests in many forums and workshops as Customs has tested the new provisions and implications for business. Excise is now part of the Trade Single Window system, speeding up the excise payment process. Movement of goods between Customs Controlled Areas also became easier, the result of Customs and industry working to come up with a business-centred solution.

### Wine Export Certification Service

During the year, the Ministry for Primary Industries decided to take over the final step in the process of issuing export approvals for wine consignments under the Wine e-Cert system. That consignment approval step had previously been performed by New Zealand Winegrowers under our Wine Export Certification Services (WECS) contract with MPI.

Although we argued strongly against the change, MPI believes it is necessary to satisfy our export markets that New Zealand’s regulatory system is robust. New Zealand Winegrowers worked with MPI to try to ensure a smooth transition.

This coming year, MPI has decided that it will also take in-house most of the telephone and email based query and support services that our WECS team has been providing to wineries – assisting them to make their export consignment requests within Wine e-Cert. We are still negotiating the scope of these changes with MPI, and will ensure members are kept informed. Our trusted WECS team will, however, continue to operate the entire export tasting process, and the random sampling programme.

### Restrictions on international trade in wine

Even without the growing uncertainties currently affecting global trade, there have been many other notable developments this year that threaten to fling sand into the machinery of international wine trade.

Pressure has continued in many countries to implement measures such as mandatory health warnings, minimum unit pricing, new certificates of analysis, product

inspections, energy and pregnancy labelling, ingredient labelling, and environmental labelling restrictions.

We opposed, or assisted other wine producing countries in opposing, poorly justified proposals in Ireland South Africa, Thailand and China; we made submissions commenting on provisions in several other countries’ free trade agreements or their proposed domestic legislation that might affect New Zealand wine exports; and we provided input to the New Zealand Government on its positions in international discussions.

We also worked with individual members to help them understand and resolve overseas market access problems, such as wine being held at the border, denied entry, or requiring relabelling. Where these problems revealed a deeper underlying issue, we worked with the New Zealand Government to try to identify whether the issue can be addressed now, or needs to be solved as part of future trade negotiations.

More positively, at the time of writing, Mexico, Japan and Singapore have already ratified the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). Only three more ratifications are required for the agreement to come into force; we anticipate that New Zealand will ratify before the end of 2018. This would be New Zealand’s first free trade agreement with Japan, Canada, Mexico and Peru, and would improve the competitiveness of our access to those markets. Already other countries have expressed interest in joining the CPTPP. Whether or not that happens, the mere fact that others recognise the benefits of belonging to a rules-based Asia/Pacific trading bloc serves to bolster the global trading system on which New Zealand winegrowers depend so heavily.

In April 2018, Uruguay joined New Zealand, Australia, USA, Canada, Chile, Argentina, South Africa, and Georgia as a member of the World Wine Trade Group. Thanks to the “mutual acceptance” principle of WWTG membership, wine made to New Zealand standards is now automatically eligible for sale in Uruguay, without needing to comply with their domestic winemaking standards.



In June, the long-awaited negotiations for a free trade agreement between New Zealand and the European Union began. Our goal is that many of the regulatory irritants in NZ/EU wine trade will be removed during these negotiations. The parallel negotiation of a UK/EU Brexit deal is certain to complicate the NZ/EU negotiations, as is the fact that agriculture will be a key issue between NZ and the EU.

New Zealand Winegrowers has been working to ensure the Government has a detailed understanding of the New Zealand wine sector's interests in the NZ/EU negotiation, and in a future NZ/UK negotiation. We are also working to support a good outcome for wine in other trade negotiations such as the Pacific Alliance.

The flip-side of having a rules-based trading system is that when a country ignores the rules, they should be challenged. New Zealand, along with several other wine producing countries, is currently a participant in two disputes against Canada under the World Trade Organisation's rules. Both of these complaints challenge a range of preferential measures that Canada makes available only to Canadian wine sold in Canada, not imported wine.

Challenging Canada to reclaim the value lost for New Zealand wineries is significant, but equally important is defending the principle: if you are a World Trade Organisation member, then you must abide by its rules. We are hopeful that Canada will agree to modify its rules through discussions during the dispute settlement process. New Zealand Winegrowers is assisting the Ministry of Foreign Affairs and Trade as it participates in these disputes.

### Planning for future workforce needs

The new Government has made higher pay and "fairer" working conditions, and other employment changes a priority. It has increased the minimum wage to \$16.50 (and intends to increase it to \$20 by 2021), extended paid parental leave to 26 weeks, and is consulting on other matters including equal pay, the Holidays Act, "fair pay" agreements, exploitation of migrant workers, and updating the government's Health and Safety Strategy. In all these consultations we provide robust submissions to ensure implications for our members are considered.

The New Zealand Winegrowers Labour Strategy has guided our activities in this area over the past year. We have:

- held several meetings with the Minister of Immigration and Workplace Relations and Safety, and with key employment and labour officials to ensure that both the needs of our sector, and the good practices that are already in place are well understood by government;
- succeeded in securing an increase in the maximum number of the Recognised Seasonal Employer workers by 600 to 11,100, and successfully advocated for a review that should make the process for allocating workers more transparent and equitable;
- worked with regional associations to gather accurate data, and to ensure that the RSE cap increase is converted into actual workers, where they are needed in the vineyards;

- refreshed, reprinted and distributed our Working for You Guide; and
- assisted the Primary ITO to promote the Viticulture Apprenticeship.

In an increasingly tight labour market, we are firmly focused on building the reputation of the wine industry as the industry of choice to work and build a career in. To that end, we have begun work on a Workforce Capability and Development Plan to help identify how the industry can best attract, retain and train workers. The plan will help inform our "people" activities over the next three to five years.

### Protecting our regional origins

In July 2017, the Geographical Indications (Wine and Spirits) Act 2006 came into force and 18 priority New Zealand wine regions applied to register their wine region names - their "Geographical Indications". New Zealand Winegrowers helped prepare each application, paid \$90,000 of application fees, and helped some regions respond to requests for extra information from the Registrar. Ten of those GIs have now been registered, and examination of the remaining eight is expected to be completed shortly.

As a result, New Zealand has joined the ranks of countries that use wine GIs to give consumers confidence in the regional wine brand. This Act will make it easier to get enforceable protection for these regional identities overseas: recognition for our registered GIs is one of our goals for the NZ/EU free trade agreement negotiations. For some regions, getting their registered GI recognised in China is also likely to be a priority.



**A pilot campaign with Uber, Sober Self Bot, encouraged users to plan for a responsible night out, and won media awards for “best use of mobile” and “best creative idea”, and was recently showcased at a government industry convention in New York.**

#### **Supporting tourism growth**

Wine tourism is surging in New Zealand. Over 210 wineries now offer a wine tasting experience, and many offer much more, including a range of tours, accommodation, and food service. For many wineries, these cellar door experiences are a key marketing and sales tool. The inability to charge for tastings under a cellar door off-licence seems both out of kilter with wineries' sense of host responsibility, and also a commercial impediment to delivering a great experience for tourists. So too is the lack of any category of cellar door licence that is well adapted to a business that has other substantial operations, such as a restaurant. These are matters that we will be working with the Government to improve this coming year.

#### **Cheers! to safe and sociable drinking**

The Tomorrow Project (TTP) aims to strengthen safe and sociable drinking behaviours. NZW jointly funds and manages the programme with Spirits NZ and the Brewers Association.

Following a strategic review of TTP and its public face, Cheers! ([www.cheers.org.nz](http://www.cheers.org.nz)), we expanded the TTP Board with two new independent Directors, bringing in both a new Chair and a respected emergency medicine specialist. We also employed a full-time Executive Director to give the initiative greater focus and drive.

Under the new strategic plan, Cheers! has hit its stride. Partnerships have been formed with both Uber and Foodstuffs – securing significant additional funding and reach. Cheers!' innovative new campaigns have resonated with their target audiences; if you are over 30 you probably missed most of them, as they were largely social media based and tightly targeted.

A pilot campaign with Uber, Sober Self Bot, encouraged users to plan for a responsible night out, and won media awards for “best use of mobile” and “best creative idea”, and was recently showcased at a government/industry convention in New York. We plan to expand that Uber campaign again this year. Our Graze When You Liaise campaign with Foodstuffs has seen that phrase enter the vernacular as a catchy reminder to eat when you drink.

A key touchstone for TTP is that to be successful, behaviour change activities must be evidence-based. To that end, a major research project on New Zealand drinking behaviours and influences is nearing completion. The results will inform the direction and activities of TTP and Cheers! for the coming years.

## International meetings 2017-2018

New Zealand Winegrowers attended the following international meetings to directly advocate for the interests of New Zealand wine in key international regulatory and industry bodies:

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### World Wine Trade Group (WWTG) Plenary Meeting

Cape Town, October 2017

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### FIVS Global Trade Policy Meeting

Cape Town, October 2017

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### FIVS General Assembly and Global Trade Policy Conference

Brussels, April 2018

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### WWTG Inter-Sessional Meeting

Brussels, April 2018

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### International Organisation of Vine and Wine (OIV) Expert Group Meetings

Paris, April 2018

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## Submissions

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

### International

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#### Protection of Geographical Indications in China

China, August 2017

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#### Geographical Indications in the Mexico-European Union FTA

Mexico, October 2017

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#### Geographical Indications in the Japan-European Union FTA

Japan, October 2017

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#### Pacific Alliance FTA

MFAT, April 2018

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#### UK's Trade Relationship with Australia and New Zealand

UK International Trade Committee, January 2018

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#### Irish Public Health (Alcohol) Bill 2015

TRIS, April 2018

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#### Comprehensive and Progressive Agreement for Trans-Pacific Partnership

FADTC Select Committee, April 2018

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#### NZ/EU Agricultural Trade Talks

March 2018

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#### USA and Australian WTO Disputes with Canada

MFAT & MPI, ongoing

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#### Core Trade Group

MFAT, ongoing

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#### WHO Non Communicable Diseases Action Plan

ongoing

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#### WHO Engagement with Non-State Actors

ongoing

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### Domestic

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#### Water Conservation Order for the Ngaruroro and Clive rivers

WCO Tribunal, August 2017

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#### Energy Labelling of Alcoholic Beverages

Food Regulation Standing Committee, August 2017

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#### Review of Cost Recovery for Selected Services

MPI, March 2018

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#### The Future of Tax

Tax Working Group, April 2018

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#### Customs Infringement Notice Scheme

Customs NZ, April 2018

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#### Sale and Supply of Alcohol (Renewal of Licences) Amendment Bill (No 2)

Governance and Administration Select Committee, April 2018

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#### Proposed Food Safety Template for Winemakers

MPI, May & June 2018

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#### Primary Production Select Committee briefing – Sustainability

May 2018

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#### Fuelling Innovation to Transform Our Economy – R&D Tax Credits

June 2018

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#### Policy Options for Pregnancy Warning Labels

Food Regulation Standing Committee, June 2018

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#### Proposal to Regulate Organic Production

MPI, June 2018

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#### NZ Health and Safety at Work Strategy 2018-2028

MBIE, June 2018

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#### Mental Health and Addiction Inquiry

June 2018

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#### Recognised Seasonal Employer Operational Review

MBIE, June 2018

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#### Brexit Technical Advisory Group

MPI, ongoing

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#### Industry Reference Group on Cost Recovery

MPI, ongoing

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#### Customs & Excise Stakeholder Group

Customs NZ, ongoing

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## Research

Building a knowledge platform that protects our members' ability to sustainably produce exceptional wines and supports innovation.



**77% of vineyards + 46% of wineries  
have adopted research results**  
(source % of industry participants)





FOCUS ON FIVE  
KEY AREAS:

Pests and diseases

Reducing costs, increasing  
profitability

Sustainability and organics

Quality wine styles for existing  
and developing markets

Technology transfer



**New Zealand's wine industry is one of the youngest in the world, but the 'can-do' attitude of our pioneering winemakers and growers puts in place a solid base for our innovative, world-class industry to flourish.**

#### Key initiatives and results from 2017-2018

New Zealand Winegrowers' active research programme is comprised of more than 20 individual programmes and projects covering all five focus areas. Research reports and articles are updated frequently and can be accessed on the members' website at [nzwine.com](http://nzwine.com)

#### Pests and diseases – Vineyard Ecosystems Programme

**Objective** – To research and understand how management choices affect New Zealand vineyards. The Programme started in 2015 and runs to February 2021.

**Total Funding** – \$7 million (NZW levy contributed \$3.5 million; co-funded by MBIE Partnership Fund \$3.5 million).

**Research** – Having successfully passed its mid-term review by government, this work continues its challenge of collecting as much valuable ecological data as possible throughout six seasons in both conventional and chemical-free vineyards. The researchers are looking forward to the comparative analysis of the prodigious amount of data collected in the growing season of 2018, with the hopes of helping the industry move towards chemical-free practices.

#### New markets and innovation – Lighter Wines Programme

**Objective** – Position New Zealand as Number 1 in the world for high-quality, lower alcohol and lower calorie wines. The programme started in 2014 and runs to February 2021.

**Total funding** – \$16.97 million (industry contribution \$8.84 million; co-funded by MPI's Primary Growth Partnership (PGP) \$8.13 million).

**Research** – Lighter wine sales in New Zealand reached \$32.4 million in retail value in June 2018 and exports continued to grow to \$5 million in FoB value. The high quality of the wine has continued to be noticed around the world, with multiple

products now being awarded gold and double gold medals in open competition. The programme has now begun its final two year stretch, where the focus will centre on key market research that will aim to fuel demand for this category.

#### Quality and profitability – Pinot Noir Programme

**Objective** – Growing returns through the dissociation of quality from productivity in New Zealand Pinot Noir production. The programme started early this year and runs to February 2023.

**Total funding** – \$10.3 million (industry contribution \$1 million; co-funded by MBIE Endeavour Fund \$9.3 million).

**Research** – Defining quality and aiming to improve it presents numerous challenges. Work has commenced on three main research areas: sensory analysis (to identify what consumers are looking for in a high-quality NZ Pinot Noir); chemical analysis (to find what molecules are responsible for these attributes); and viticulture/winemaking research (to identify what management choices can help bring about these characteristics in the final product).



## NZ Winegrowers Research Centre Limited

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### Vision

Transforming the NZ grape and wine industry through research, innovation and extension

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### Mission

Delivering world-leading research outcomes from grape to glass

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### Purpose

Research to support the profitable growth of wine from NZ

Research to protect the competitive position of wine from NZ

### How New Zealand wine innovates into the future will be a key driver of the New Zealand Winegrowers Research Centre Limited (NZWRC), as it ramps up its activities and moves beyond start-up phase.

Receiving up to \$12.5 million in funding from the Ministry of Business, Innovation and Employment over the next three years, and with support from the Marlborough District Council, the NZWRC has made several key appointments in recent months.

Mark Gilbert was appointed as independent Chair of the NZWRC Board in March 2018, followed by the appointment of MJ Loza as CEO in May 2018. Tracy Bengel came on board as Development Manager, and recruitment has started for the Head of Research and Innovation, with the successful candidate hopefully joining before year end 2018.

In June 2018, workplans were submitted to MBIE, completing initial contracting and planning activities.

Industry consultation identified biosecurity, climate change and innovative technologies as research priorities, and these areas are reflected in the research strategy and workplans.

Alongside the Pinot Noir project, which was the first research programme contracted by NZWRC, a project investigating vineyard groundcover and amenity plantings and their interactions with vineyard pathogens has been contracted with Plant & Food Research, and includes a project by a talented PhD student from UC Berkeley.

A programme of work looking at impacts of climate change on winegrowing, and adaptation techniques, involving NIWA and AWRI, is also under development.

Wholly owned by NZ Winegrowers Inc., NZW will provide NZWRC with a range of support services.

NZWRC will manage and deliver NZW's levy-funded research programme, alongside NZWRC's portfolio of projects. All research will be guided by industry interests and priorities, overseen by the NZWRC Board, which at year-end comprised Mark Gilbert (Chairman), James Dicey, Philip Gregan (retiring 30 June 2018), Peter Holley, and Dominic Pecchenino.

The 2018/2019 year will see the finalisation of NZWRC's operating processes, research and innovation management systems, partnering agreements with other NZ and international research providers, the confirmation of its location and the commencement of works developing the centre's physical facilities. A research winery will be a key element of the centre's capability, with plans for this to be operational in time for 2020's vintage.

**“We all know Marlborough for Sauvignon Blanc, and increasingly for Pinot Noir, but here’s a hitherto overlooked but exciting side of this cool region: world class fizz.”**



## Research projects funded by NZW 2017/2018

### Quality wine styles for existing and developing markets

#### Lighter wines (PGP)

University of Auckland and Plant and Food Research (Various). Jointly funded by NZW and MPI Primary Growth Partnership (PGP) fund.

#### High-throughput genotyping of transposon-induced mutations in vines

Lincoln University (C Winefield)

#### Population genomics of the wine spoilage yeast *Brettanomyces bruxellensis*

Auckland University (M Goddard)

#### Low alcohol-reduced calorie wines using molecular sponges for sugar removal

University of Auckland (B Fedrizzi)

#### Shoot trimming effects on Pinot Noir vine leaf area to fruit weight ratio, productivity and fruit composition

Lincoln University

#### The role of microbes in regional Pinot Noir quality and style

University of Auckland (M Goddard)

#### Assessment of commercially available yeast nutrient products on Sauvignon Blanc microvin ferments

(K Creasy)

#### UC Davis collaboration to determine factors that affect colour in Pinot Noir wines when grapes are harvested at lower than target berry soluble solids

Plant and Food Research (C Grose)

#### Breaking the quality-productivity seesaw in wine grape production (Pinot Noir Programme)

University of Auckland, Plant and Food Research and Lincoln University (Various) - Jointly funded by NZW and MBIE

#### Exploring the chemical space in Vineyard Ecosystems (VE) Programme juices and wines

University of Auckland (B Fedrizzi)

#### Untargeted aroma compound chemical analysis of Pinot Noir

Hills Laboratory (R Hill)

#### Testing the effect of gelatin pre-fermentation fining on ethanol production

University of Auckland (B Fedrizzi)

### Pests and diseases

#### Grapevine trunk disease; young vine ecology, diagnostics and preventative treatments

New Zealand Viticulture Nursery Association Incorporated (VINA) (N Hoskins)

#### Virus diversity in New Zealand grapevines: sequence, ecology and impact - The Rod Bonfiglioli Scholarship

Plant and Food Research (R MacDiarmid - student A Blouin)

#### Spray protocols to quantify and optimise spray deposits applied to dormant grapevines (trunks, heads, cordons and canes)

Plant and Food Research (M Walter) Supported by MPI Sustainable Farming Fund as part of the powdery mildew best practice project

#### Developing powdery mildew best practice in New Zealand vineyards

A Lambourne - Supported by MPI Sustainable Farming Fund

#### Optimising management of grapevine trunk diseases for vineyard longevity

South Australian Research & Development Institute (M Sosnowski)

### Cost reduction/increased profitability

#### Precision Grape Yield Analyser Programme 2016-2021

Lincoln Agritech Limited (A Werner)

#### An automated grape yield estimation system - The Rod Bonfiglioli Scholarship

Massey University (M Legg)

### Sustainability/organics

#### Pinot Noir wine composition and sensory characteristics as affected by soil type and irrigation in the Waipara region

Lincoln University

#### Vineyard Ecosystems Programme

University of Auckland and Plant and Food Research (Various) Jointly funded by NZW and MBIE

#### Sector weather data licence & tools

HortPlus (NZ) Ltd

#### Cost efficient optimisation of weed management in vineyards

Thoughtful Viticulture (M Krasnow)

#### Optimisation of irrigation and water savings in Marlborough Sauvignon Blanc and Pinot Noir and Hawke's Bay Chardonnay and Merlot

Thoughtful Viticulture (M Krasnow)



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### **The Pathway of Volatile Sulfur Compounds in Wine Yeast**

M Kinzurik – Auckland University

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### **Temporal sensory characterisation of Sauvignon Blanc wines varying systematically in alcohol concentration**

B Pineau – Plant and Food Research Limited

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### **Chemical analysis and sensory evaluation of the research Sauvignon Blanc wines produced from the 2015-16 grapevine nutrition trial**

B Pineau – Plant and Food Research Limited

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### **New Zealand wine consumers' sensory perception of, and hedonic responses to, Sauvignon Blanc research wines varying in wine style, phenolic content, and/or in the grapevine canopy size at véraison**

B Pineau – Plant and Food Research Limited

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### **Continued testing of *Saccharomyces cerevisiae* and non-*Saccharomyces* yeast candidates for their potential to reduce final alcohol content in Sauvignon Blanc wine**

S Knight and M Goddard – The University of Auckland

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### **Influence of differing mid to late fermentation temperatures on Sauvignon Blanc wine composition in relation to low alcohol wine production**

C Grose et al. – Plant and Food Research Limited

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### **Skin contact annual report**

D Martin, C Grose and A Albright – Plant and Food Research Limited

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### **Grapevine trunk disease: young vine ecology, diagnostics and preventative treatments**

Eline van Zijll de Jong et al.

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### **Powdery Mildew Case Studies – 2017-2018**

A Lambourne et al.

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### **Weed management in New Zealand vineyards: Reducing and eliminating herbicide use**

M Krasnow et al.

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### **Botrytis control in grapevines by mechanical shaking**

A Haywood and M Krasnow

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### **Grapevine growth stage monitoring for prediction of key phenological events final report (VineFacts)**

R Agnew et al. – Plant and Food Research Limited

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### **Influence of potassium nitrate and calcium thiosulphate fertilisers on mineral content of Sauvignon Blanc petioles, pre-fermentation juice and wine composition**

S Neal et al. – Plant and Food Research Limited

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### **Development and deployment of a high throughput genotyping method for identification and characterisation of transposon-induced mutations.**

D Lizamore and Dr Winefield – Lincoln University

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### **Vineyard Ecosystems RA 1.1 Annual Report – Vineyard Ecosystems**

M Greven et al. – Plant and Food Research Limited

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### **Vineyard Ecosystems RA 1.2 Annual Report – Relating under-vine management, biota and leafroll virus**

V Bell et al. – Plant and Food Research Limited

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### **Vineyard Ecosystems RA 1.3 Annual Report – Pathogen Management**

D Mundy et al. – Plant and Food Research Limited

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### **Upgrading of wine expert panel and sensory test procedure: outcomes, key insights gained, and perspectives for future research**

B Pineau et al. – Plant and Food Research Limited

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### **Canopy manipulations to slow sugar accumulation for the production of lower alcohol wines: Pinot Gris and Merlot Rosé**

M Krasnow et al.

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### **Influence of the amount of canopy trimming on Sauvignon Blanc berry maturation, settled juice and wine composition**

J Bennett et al. – Plant and Food Research Limited

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### **Alternative Uses of Grape Marc: Literature Review**

The Australian Wine Research Institute (AWRI)



## Research articles 2017/2018

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### **Grapevine growth stage monitoring for prediction of key phenological events**

R Agnew - Plant and Food Research

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### **Pinot Noir vine performance and grape and wine composition as affected by soil type and irrigation reduction in the Waipara region**

G Creasy - Lincoln University

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### **A brief history of DNA testing in vines**

D Lizamore - Lincoln University

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### **Powdery project - what's going on?**

A Lambourne

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### **Enhancing disease detection with image analysis based on non-visible imaging**

K Chooi et al. Plant and Food Research

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### **Bridging the Gap: An Introduction to Quantitative Analysis in the field of Pruning Decision-Making**

A Kirk et al.

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### **Brettanomyces in New Zealand**

C Curtin and M Goddard - The University of Auckland

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### **Under, On and In Grapevines: Vineyard Ecosystems (Parts 1 and 2)**

R MacDiarmid et al. Plant and Food Research and The University of Auckland

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### **Optimising management strategies for grapevine trunk diseases**

M Sosnowski et al. SARDI

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### **UC Davis collaboration to determine factors that affect colour in Pinot Noir wines**

C Grose et al. Plant and Food Research

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### **What is your leafroll number?**

A Blouin and R MacDiarmid - Plant and Food Research

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### **An automated grape yield estimation system**

B Parr and M Legg - Massey University, Auckland

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### **Spray protocols to quantify and optimise spray deposits applied to dormant grapevines (trunks, heads, cordons and canes)**

M Walter and D Manktelow

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### **Shoot trimming effects on Pinot Noir**

G Creasy - Lincoln University

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### **Vine Options for Lighter Wines**

New Zealand Winegrowers

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## Fact sheets

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### **Spray days 2017 Powdery Mildew Self-Assessment**

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### **Spray Days - Assessing Spray Coverage**

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### **Spray Days - Canopy Management**

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**“Perhaps no other wine style is as instantly recognizable as New Zealand Sauvignon Blanc.... it put New Zealand wine on the map in all its brash, aromatic and crisply-acidic glory. Today, it's one of America's most popular sippers, renowned for consistency and affordability.”**

Christina Pickard, Wine Enthusiast Magazine, USA

## Information Resources

New Zealand Winegrowers information resources are highly valued by our members.



99% → wineries measure + monitor energy use

98% → monitor to optimise water



**A core function of New Zealand Winegrowers is the provision of up-to-date information delivered in a timely manner to members, trade, media and consumers.**

All of the information published by New Zealand Winegrowers is available online at either [nzwine.com](http://nzwine.com) or [nzwine.com/members](http://nzwine.com/members)

New Zealand Winegrowers also produces a wide range of printed publications, brochures and promotional items, ranging from spray schedules to varietal sales guides.

**Industry Reports and Statistics**

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- Monthly New Zealand Wine Export Report
- Monthly Export Statistics
- Monthly Domestic Market Reports
- New Zealand Wine Industry Key Performance Indicator Snapshots
- Vintage Survey Reports and Indicators
- New Zealand Winegrowers Vineyard Spray Schedule
- Vineyard Register Report
- Viticulture Financial Benchmarking Programme
- Sustainable Winegrowing New Zealand Reports

**Labelling and International Market Access**

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- International Labelling Guide (27th Edition) May 2018
- International Labelling Matrix Guide Poster (26th Edition)
- Representations of origin for wines sold in New Zealand

**Vineyard, Winemaking and Cellar Door Practices**

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- International Winemaking Practices Guide (11th Edition) June 2017

**Labour/Health and Safety/Legal**

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- Working For You
- Working Well - New Zealand Winegrowers and Worksafe New Zealand
- Legal Guide - New Zealand Winegrowers and Bell Gully

**Marketing and Communication**

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- What's Fermenting - monthly e-newsletter to members
- New Zealand Winegrower Magazine - published by Rural News Group Ltd under Authority of New Zealand Winegrowers
- New Zealand Winegrowers Post Event and Seminar Reports
- New Zealand Wine Promotional Material (Varietal and Regional Guides, Maps, Promo Items etc) - available for purchase
- New Zealand Wine Educational Textbook (available in Mandarin & English)
- New Zealand Wine Overview Presentation
- Guides to market (Australia, Canada, USA, Germany, The Netherlands, Sweden, UK)
- Jean Smullen's Ireland Market Report
- Debra Meiburg's Guide to the Wine Trade (Beijing, Hong Kong, Shanghai, Singapore, Taiwan)
- Pricing Calculators (Australia, Canada LCBO & BCLDB, UK, China, Germany, Japan, Sweden, The Netherlands, Singapore)
- Euromonitor Country Market Reports for 18 Countries
- Nielsen Scantrak Data Reports (UK)
- Wine Intelligence Chinese Wine Market Landscape Report

# Sustainability

Creating and communicating  
a legacy of sustainability.



98% → New Zealand's vineyard area is Sustainable  
Winegrowing New Zealand certified



**A highlight of the year was recognition of the Sustainable Winegrowing NZ (SWNZ) programme at both national and international award ceremonies.**



**SWNZ scoops awards**

SWNZ received a special judge's commendation in the Communicating for Change category at the NZ Sustainable Business Network awards in November. The commendation highlighted SWNZ's in-season reporting and the effort undertaken to communicate relevant information to members on a timely basis. The focus of the reporting is to enable growers to make any changes to their spray plans during the season based on benchmarking reports.

In October, UK-based The Drinks Business Green Awards chose the SWNZ programme as their Green Initiative of the Year. In a highly contested category of the most ethical and environmentally-friendly companies in wines, beers and spirits, SWNZ was recognised for a programme that encompassed the best of efficient and effective sustainable practices.

These awards reinforce the reputation of SWNZ as the world leading sustainability programme for the wine industry.

**Spray Diary**

For the 2017/18 season, a rates calculator was provided in our Grapelink spray diary software to deliver guidance to members around spray application rates. The calculator is designed to assist members adjust from a land-based per hectare spray rate to an adjusted rate that accounts for different row spacing and canopy density and avoids under or over spraying. From the introduction in October to the end of December, 43% of entries were at the new adjusted rate, up from 25% of entries for the corresponding time in 2016. This reflects a significant change, with the industry moving away from application rates per hectare.

**Vinefacts**

Vinefacts is a service that gives weekly in-season weather and phenology information to members. For the 2017/18 season it was provided free of charge to all New Zealand Winegrowers members through SWNZ. Feedback on the value of the service was extremely positive and over 2000 downloads of the reports were registered weekly, when each issue was released through the nzwine.com website.

**Growing importance of sustainability**

This year members of the Marlborough Grape Producers Cooperative (MGP) joined the SWNZ programme. A series of workshops was held with the group to ensure they knew requirements and to assist both MGP and SWNZ in the smooth on-boarding and pre-harvest audit of these new members.

A strong lineup of speakers at the annual Bragato conference highlighted the importance of sustainability. Topics covered included the long term strategic value associated with being a globally trusted source of sustainably produced products, the high sustainability standards required and the integration of sustainability into brand messaging.

The SWNZ Continuous Improvement programme (SWNZ CI) was launched last year as an extension to the SWNZ programme. The pilot has been extended for a further 12 months as interested SWNZ members work with their organisations to determine their sustainability goals and action plans for how to reach them. The waste pillar is popular with a number of wineries interested in reducing their waste to landfill. A 'winery waste' group was established in May and has met twice already to share issues and insights to achieve their waste reduction goals.



## Biosecurity – ensuring healthy vineyards

Mitigating biosecurity risk is fundamental to the sustainability of the New Zealand wine industry.

In February 2018 the Board re-confirmed the objectives of the New Zealand Winegrowers Biosecurity Strategy and approved new targets to be achieved by the end of calendar year 2019. These targets will guide our ongoing activity over the next 18 months. Consistent with these targets, New Zealand Winegrowers will recruit an extra biosecurity team member in the coming year to enable us to maximise protection to the industry.

Managing the risk of brown marmorated stink bug (BMSB) has remained a high priority this year. In July 2017 NZW signed the BMSB Operational Agreement; partnering with other industry organisations and MPI to help improve readiness for this unwanted pest. In October 2017, New Zealand Winegrowers visited Santiago Chile to learn more about establishing a lure-based surveillance grid for detecting BMSB in an urban environment. Similarly, NZW has been heavily involved in the EPA application to allow the import of samurai wasp, a BMSB biocontrol, into secure containment for release in the event of an incursion. NZW presented at a hearing on this application in July. Consistent with the submissions made by New Zealand Winegrowers, MPI has also significantly strengthened measures at the border to prevent entry of this pest. This readiness work is important as BMSB pressure at the border is at an all-time high. There were over 250 interceptions during

the 2017/18 high-risk season including four interceptions that were detected post-border.

There have been no major biosecurity responses that have directly impacted the wine industry in the last 12 months. Nonetheless, the harlequin ladybird, a potential threat to wine quality at harvest time, continued its spread throughout New Zealand's wine regions. This pest is now well established in Gisborne and Hawke's Bay and has been detected in Nelson and Marlborough. Developing management advice to help deal with this pest will be a key priority over the coming year.

Throughout 2017/18 we have also focused on maximising member awareness of potential biosecurity threats and their participation in biosecurity activities to mitigate risk. Regular biosecurity columns on the members' website and in a range of national and regional industry publications have helped raise awareness that everyone involved in the wine industry has a role in protecting industry biosecurity.

In late 2017 New Zealand Winegrowers launched our Vineyard Biosecurity Guidelines for Best Practice, which contains practical advice to assist members to protect their vineyard assets. Furthermore, in June 2018 New Zealand Winegrowers joined the National Biosecurity Capability Network (NBCN). The NBCN is a key element of the New Zealand biosecurity system, a network of organisations that join together to respond to biosecurity incursions. Joining the NBCN will be a catalyst for the wine industry to develop

an industry specific network of biosecurity champions that promote biosecurity awareness, response training and best practice. Further work to develop this network will be a key priority for the year ahead.

At the 2018 Grape Days we engaged with over 800 members on mitigating biosecurity risks posed by BMSB, the harlequin ladybird and grapevine red blotch disease. We also launched a New Zealand Winegrowers fact sheet that outlined the potential risk of grapevine red blotch and highlighted the importance of vineyard surveillance as we approach vintage 2019.



**“What impressed me most about the Kiwis is their deep love and respect for the land, and how we are only keepers of it, passing it on to the next generation. Sustainability is second-nature, and being carbon-zero and certified bio is something that everyone strives for, not to market their wines better but just because it’s the mindset of the people.”**

Yeo Xi-Yang, Sommelier,  
The Lo and Behold Group, Singapore

## **Submissions made to Government in 2018**

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### **12 June 2018**

Proposed changes to the Import Health Standard for Vehicles, Machinery and Equipment

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### **21 May 2018**

EPA application APP203336 to seek pre-approval to release *Trissolcus Japonicus* (the Samurai Wasp) as a biocontrol agent for BMSB

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### **21 March 2018**

A review of cost recovery for selected services provided by the Ministry for Primary Industries

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### **29 January 2018**

Proposed Import Health Standard for vehicles, machinery and equipment

## Marketing

Developing and supporting  
the growth of the New Zealand  
wine brand.



27% → international visitors visit a winery.  
The wine tourist spends 52% more + stays  
six days longer than the average tourist.

## Wine Tourism 2017-2018



Number of international wine tourists

**712,135**

Spending by wine tourists

**\$3.8 billion**

Source NZIER/MBIE - Year to June 2017



The wine tourist spends more than the average holiday visitor by

**52%**

International visitors that went to a winery

**27%**



The New Zealand wine tourist stays

**6 days**

longer than the average holiday visitor and visits more regions - 4.6 versus 3.5 regions

Source IVS \*3 YE Dec 2016



**279**

wineries offer a total of

**433**

wine tourism experiences on [nzwine.com/visit](http://nzwine.com/visit)

**42%**

who golfed also visited a winery

**42%**

who cycled also visited a winery

Propensity of the top international visitor markets to visit a winery

**41%** USA

**26%** Australia

**21%** China

Source TNZ/IVS - YE Dec 2017



**243** SIP experiences

**74** DINE experiences

**69** STAY experiences

**47** PLAY experiences

**“Always friendly, never pretentious, the Kiwis share an endearing down-to-earth trait and somehow I feel I’ve got closer to the earth, as a result. I’ve learnt a lot about sustainability, organics and biodynamics during my visit, but so much of it seems so simple. It’s charming. I’m smitten.”**

David Kermode, [www.vinosaurus.co.uk](http://www.vinosaurus.co.uk), UK

## International Visitor Programme 2017-2018

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**60**

International visitors hosted  
**17** from the USA, **15** from Australia,  
**11** from the UK & Ireland, **11** from Asia,  
**3** from Canada, **3** from Europe



**100%**

Satisfaction rate  
(post-trip surveys)



**12**

Wine Experience Tours -  
organised with regional  
associations for groups during  
January/February 2018

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**36**

Sommeliers attended  
the Sommits™ in Nelson  
and Central Otago



**311**

Individual winery visits  
conducted by guests



**33**

Regional Overview Tastings  
or individual guests

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**8** printed articles to date  
with a circulation of  
**1.16 million** and  
**1** radio broadcast with  
**116,000** listeners  
**33** on-line articles  
on sites with  
**226 million** unique  
visitors per month



Strong social media noise  
during January/February  
visits with **756** posts  
by guests, **208.3k** reach  
and **56.4k** engagement

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## International Education Programme 2017-2018



# 99%

Satisfaction rate  
(post seminar survey results)



# 98%

Likely to list, write  
or educate



# 650+

Wines poured from over 175  
individual wineries to over  
18,000 attendees  
(6,000 trade & 12,000 consumers)

# 92

Seminars, masterclasses,  
education programmes and  
self-pours in 18 markets

25 in the USA  
7 in Canada  
16 in the UK & Ireland  
13 in Europe\*  
22 in Asia\*  
9 in Australia

**“Sommit was without a doubt the most incredible experience of my professional life. Not only was it fun and informative and adventurous, it personified the New Zealand wine industry through gracious hosts, serious winemakers and a level of playful uniqueness that won’t ever be forgotten.”**

Anthony Pieri, Group Sommelier  
Apples + Pears Entertainment Group, Australia



## Thanks to our partners



\*with support from NZTE

## USA

### ● Marketing programme

Seminars: 25  
Trade/media visitors: 17

### ○ User pays events

Events: 10  
Trade/media: 751  
Consumers: 2000+  
Wineries showcased\*: 471  
Wines\*: 1,188



## UK & Ireland

### ● Marketing programme

Seminars: 16  
Trade/media visitors: 11

### ○ User pays events

Events: 5  
Trade/media: 716  
Consumers: 1853  
Wineries showcased\*: 174  
Wines\*: 864



## Europe

### ● Marketing programme

Seminars: 13  
Trade/media visitors: 3

### ○ User pays events

Events: 4  
Trade/media: 60,997  
Consumers: 168  
Wineries showcased\*: 100  
Wines\*: 547







## Australia

### ● Marketing programme

Seminars: 9  
Trade/media visitors: 15

### ○ User pays events

Events: 6  
Trade/media: 95  
Consumers: 140  
Wineries showcased\*: 84  
Wines\*: 203



## Canada

### ● Marketing programme

Seminars: 7  
Trade/media visitors: 3

### ○ User pays events

Events: 14  
Trade/media: 2,508  
Consumers: 82,656  
Wineries showcased\*: 171  
Wines\*: 479



## Asia

### ● Marketing programme

Seminars: 22  
Trade/media visitors: 11

### ○ User pays events

Events: 5  
Trade/media: 18,587  
Consumers: 928  
Wineries showcased\*: 60  
Wines\*: 472



\* Calculated per event, some wineries/wines counted more than once.

# Wine Awards



## Bragato Wine Awards 2017

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### **Bragato Trophy for Champion Wine of the Show**

The Boneline Cabernet Franc 2016  
Canterbury  
Vineyard: Waipara West  
Grower: Lindsay Hill

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### **Richard Smart Trophy for Champion Rosé**

Clark Estate Dayvinleigh Rosé 2017  
Marlborough  
Vineyard: Dayvinleigh  
Grower: Kevin Johnston

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### **Nick Nobilo Trophy for Champion Gewürztraminer**

Bladen Gewürztraminer 2016  
Marlborough  
Vineyard: Paynters Road Vineyard  
Grower: Keven and Kerry Tilly

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### **Mike Wolter Memorial Trophy for Champion Pinot Noir**

Ruby Bay Pinot Noir 2016  
Nelson  
Vineyard: Ruby Bay Vineyard  
Grower: Andrew Tamplin

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### **New Zealand Frost Fans Trophy for Champion Sweet Wine**

Villa Maria Reserve Noble Riesling  
Botrytis Selection 2015  
Marlborough  
Vineyard: Rocenvin Vineyard  
Grower: Christine Fletcher

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### **O-I New Zealand Trophy for Champion Emerging White Wine**

Askerne Viognier 2016  
Hawke's Bay  
Vineyard: Askerne  
Grower: Kathryn and John Loughlin

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### **Alan Limmer Trophy for Champion Syrah**

Coopers Creek SV 'Chalk Ridge'  
Syrah 2015  
Hawke's Bay  
Vineyard: Chalk Ridge  
Grower: Wayne Morrow

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### **Glengarry Trophy for Champion Sparkling Wine**

Akarua Vintage Brut 2011  
Otago  
Vineyard: Cairnmuir Road  
Grower: Mark Naismith

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### **Spence Brothers Trophy for Champion Sauvignon Blanc**

Konrad Single Vineyard Sauvignon  
Blanc 2016  
Marlborough  
Vineyard: Konrad Wines  
Grower: Konrad Hengstler

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### **O-I New Zealand Trophy for Champion Emerging Red Wine**

The Boneline Cabernet Franc 2016  
Canterbury  
Vineyard: Waipara West  
Grower: Lindsay Hill

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### **Friedrich Wohnsiedler Trophy for Champion Riesling**

Waipara Hills Soul Deans Riesling 2015  
Canterbury  
Vineyard: Deans Vineyard  
Grower: Accolade Wines

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### **Bill Irwin Trophy for Champion Chardonnay**

Domaine Rewa Chardonnay 2015  
Otago  
Vineyard: Domaine Rewa  
Grower: Philippa Fourbet

---

### **Tom McDonald Memorial Trophy for Champion Classical Red Wine**

Saint Clair James Sinclair Cabernet  
Merlot 2015  
Hawke's Bay  
Vineyard: Plateau Vineyard  
Grower: Neal & Judy Ibbotson

---

### **Brother Cyprian Trophy for Champion Pinot Gris**

Devil's Staircase Pinot Gris 2016  
Otago  
Vineyard: Rockburn Wines Ltd  
Grower: Chris James, Richard Bunton,  
Paul Halford

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## Air New Zealand Wine Awards 2017

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### **Air New Zealand Champion Wine of the Show**

Isabel Chardonnay  
Marlborough 2016

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### **O-I New Zealand Reserve Wine of the Show**

Dashwood Pinot Noir  
Marlborough 2016

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### **JF Hillebrand New Zealand Champion Pinot Noir**

Dashwood Pinot Noir  
Marlborough 2016

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### **Label and Litho Limited Champion Sauvignon Blanc**

Goldwater Sauvignon Blanc Wairau Valley  
Marlborough 2017

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### **Rabobank Champion Chardonnay**

Isabel Chardonnay  
Marlborough 2016

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### **Dish Magazine Champion Open Red Wine**

Dashwood Pinot Noir  
Marlborough 2016

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### **Bayleys Real Estate Champion Merlot, Cabernet and Blends**

Villa Maria Cellar Selection  
Organic Merlot  
Hawke's Bay 2016

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### **Fruitfed Supplies Champion Syrah**

Coopers Creek Reserve Syrah  
Hawke's Bay 2016

---

### **Guala Closures New Zealand Champion Pinot Gris**

Saddleback Pinot Gris  
Central Otago 2017

---

### **New World Champion Open White Wine**

Goldwater Sauvignon Blanc  
Wairau Valley Marlborough 2017

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### **New Zealand Winegrowers Champion Sweet Wine**

Forrest Botrytised Riesling  
Marlborough 2016

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### **Plant & Food Research Champion Riesling**

Mount Riley Riesling  
Marlborough 2017

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### **Quay Connect Champion Other White Styles**

Nautilus Albariño  
Marlborough 2017

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### **Riedel New Zealand Champion Gewürztraminer**

Lawson's Dry Hills Gewürztraminer  
Marlborough 2016

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### **WineWorks Champion Sparkling Wine**

Aotea by the Seifried Family Méthode  
Traditionnelle Nelson NV

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### **New Zealand Winegrowers Champion Exhibition White or Sparkling Wine**

Isabel Wild Barrique Chardonnay  
Marlborough 2016

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### **New Holland Agriculture Champion Exhibition Red Wine**

Falcon Ridge Estate Syrah  
Nelson 2016

“Impressed with how many grape varieties are grown successfully in the country and how the vein of freshness prevails across varietals. I appreciated the thoughtful regional pride; there was a general awareness of the larger world of wine both in New Zealand and abroad that informs the framework of what individuals are creating in their respective regions.”

Lauren Collins Daddona, Wine Director, Les Sablons, USA



# Financials

**New Zealand Winegrowers Incorporated is the industry organisation of and for the wine makers and grape growers of New Zealand. Our mission is to create enduring value for our members.**

These are the accounts for New Zealand Winegrowers Incorporated and its subsidiaries, NZW Wines Limited Partnership and New Zealand Winegrowers Research Centre Limited.

Operating income includes the grape and wine levies. These are used to fund marketing, research, sustainability and advocacy activities.

User Pays activities includes marketing events in New Zealand and overseas, the Sustainable

Winegrowing New Zealand programme, provision of the Wine Export Certification Service and the Romeo Bragato Conference.

New Zealand Winegrowers Research Centre has been established to provide world-leading science, research and innovation to benefit New Zealand's entire grape and wine industry.

NZW Wines Limited Partnership's activity is research into production and other aspects of lower alcohol and lower calorie wine.

New Zealand Winegrowers reserves policy is to hold reserves at a level of \$3 million (a biosecurity reserve of \$1 million and \$2 million to cover income reduction in the event of a small vintage) in addition to a user pays reserve of \$440,000. New Zealand Winegrowers is currently actively managing its future expenditure to bring reserves to that level, by funding ongoing activity that targets our strategic objectives.

The financial information presented below has been extracted from the audited financial statements of New Zealand Winegrowers Incorporated for the year ended 30 June 2018.

## High-level breakdown

Year to 30 June 2018

**\$19.0m**

**↓ 4%**

Operating Income

**\$20.8m**

**↑ 2%**

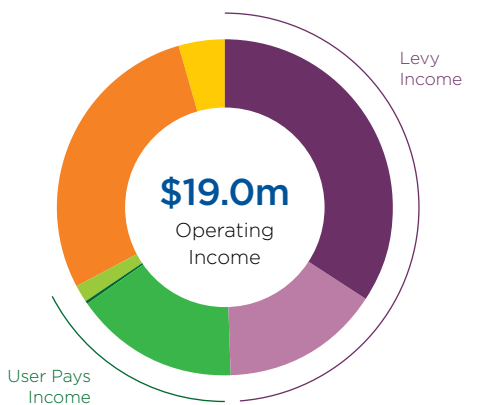
Expenditure

**\$6.8m**

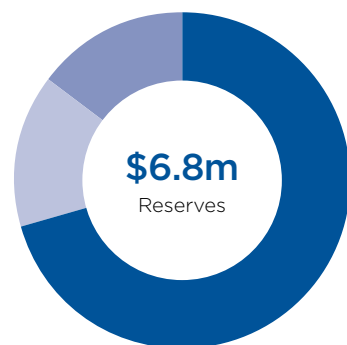
**↓ 20%**

Reserves

### Operating Income and Reserves Summaries



- Wine levy **\$6.3m ↓ 9%**
- Grape levy **\$2.8m ↑ 11%**
- Marketing user pays **\$2.9m ↓ 45%**
- SWNZ **\$0.7m ↑ 2%**
- Romeo Bragato Conference **\$0.3m ↓ 9%**
- External funding for research **\$5.2m ↑ 60%**
- Other **\$0.8m ↑ 15%**



- Levy/other **\$4.8m ↓ 26%**
- Biosecurity **\$1.0m**
- User pays **\$1.0m ↑ 3%**



## Breakdown of expenditure by objective

Key Achievements	Levy		Non Levy
<b>Research &amp; Innovation</b>			
24 projects funded	\$2.6m		\$4.4m
NZW Research Centre Ltd now operating	↑ 4%		↑ 86%
<b>International Marketing &amp; Tourism</b>			
60 international trade & media	\$2.7m		\$1.6m
30 in-market events	↓ 11%		-
92 in-market seminars			
<b>Administration</b>			
Strategic review initiated	\$1.7m		\$0.1m
	↑ 11%		↑ 2011%
<b>Events in New Zealand</b>			
Air New Zealand Wine Awards	\$0.07m		\$1.3m
Sommelier Sommits™	↓ 18%		↓ 64%
Bragato Wine Awards			
<b>Sustainability &amp; Capability</b>			
Sustainable Winegrowing Programme	\$0.9m		\$0.7m
Women in Wine & Support for Young Vit & Young Hort	↑ 51%		↓ 12%
Bragato Education Trust donation			
<b>Member Information</b>			
800 attended Grape Days	\$1.2m		\$0.5m
Romeo Bragato Conference	↑ 46%		↑ 2%
Vinefacts			
<b>Regions</b>			
Regional Membership Council	\$1.0m		\$0.3m
Regional funding	↑ 3%		
Contestable Fund			
<b>International Trade (Advocacy)</b>			
Attendance at FIVS, WWTG, OIV, APEC meetings	\$0.4m		\$0.3m
OIV - Director General Election Campaign	↓ 22%		↓ 3%
12 International Submissions & Policy Proposals			
<b>Domestic Trade (Advocacy)</b>			
Labour Strategy & RSE	\$1.1m		\$0.2m
Cheers!	↑ 18%		
18 Domestic Submissions & Policy Proposals			
<b>Biosecurity</b>			
Revised Biosecurity Strategy adopted	\$0.2m		\$0.2m
BMSB operational agreement signed	↑ 8%		
<b>Total</b>	<b>\$11.9m</b>		<b>\$8.9m</b>
	↑ 6%		↓ 3%
<b>Total Expenditure</b>			<b>\$20.8m</b>
			↑ 2%

## Statistics

On the back of plentiful global opportunities, the country's productive vineyard area continues to grow, increasing by an additional 2% to reach 37,969 hectares.



243 cellar doors throughout NZ drive more visitors to the regions → Vineyards and wineries are key participants in regional growth.

## A snapshot of the New Zealand wine vineyard 2018

### Top producing areas

Total producing area

**37,969 ha**

Total producing area by variety

**Red 7,876 ha**

**White 30,092 ha**

Producing area of Sauvignon Blanc

**23,102 ha**

Number of vineyards

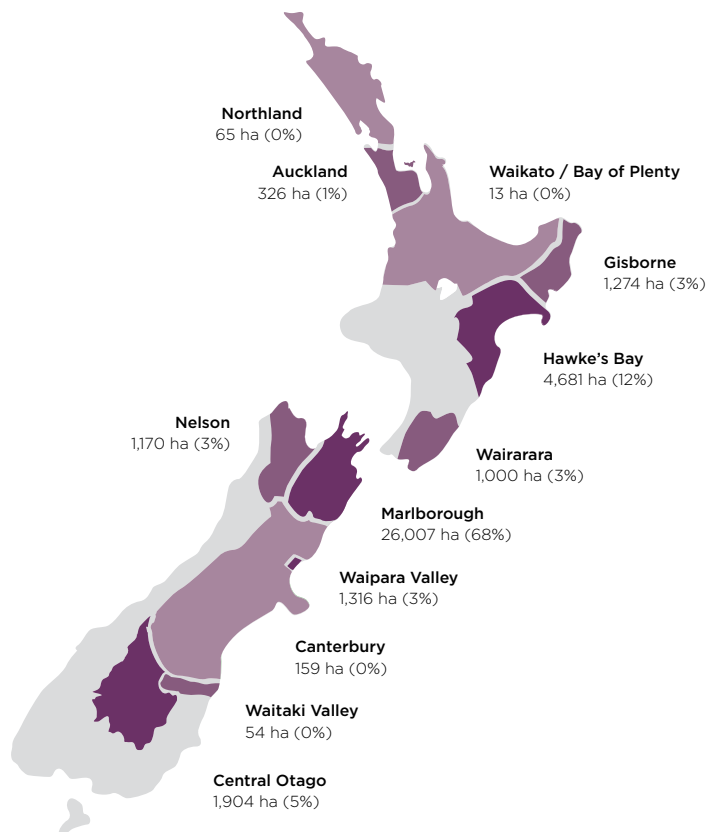
**2031**

Average area of vineyard

**18.5 ha**

Percentage increase on preceding year

**3%**



### Top producing varieties



#### Red varieties

Pinot Noir  
**72%**

Merlot  
**15%**

Syrah  
**6%**

Cabernet Sauvignon  
**3%**

Malbec  
**2%**

Cabernet Franc  
**1%**

Other  
**2%**



#### White varieties

Sauvignon Blanc  
**77%**

Chardonnay  
**11%**

Pinot Gris  
**8%**

Riesling  
**2%**

Gewürztraminer  
**1%**

Other  
**1%**

# Summary of New Zealand Wine

(2009–2018)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Number of wineries</b>	643	672	697	703	698	699	673	675	677	697
<b>Number of growers</b>	1073	1128	853	824	835	858	762	747	726	699
<b>Producing area (hectares)</b>	31,964	33,200	34,500	35,337	35,182	35,510	35,463	36,226	36,943	37,969
<b>Average yield (tonnes per hectare)</b>	8.9	8.0	9.5	7.6	9.8	12.6	9.1	12.0	10.7	11.1
<b>Average grape price (NZ\$ per tonne)</b>	1,629	1,293	1,239	1,359	1,688	1,666	1,732	1,807	1,752	N/A
<b>Tonnes crushed (thousands of litres)</b>	285	266	328	269	345	445	326	436	396	419
<b>Total production (millions of litres)</b>	205.2	190.0	235.0	194.0	248.4	320.4	234.7	313.9	285.1	301.7
<b>Domestic sales of NZ wine (millions of litres)</b>	59.3	56.7	66.3	64.6	51.7	49.9	61.9	56.2	52.1	52.7*
<b>Consumption per capita NZ wine (litres)</b>	13.9	13.0	15.2	14.7	11.6	11.2	13.7	12.2	11.0	10.9*
<b>Total domestic sales of all wine (millions of litres)</b>	92.7	92.1	93.9	91.9	92.5	90.6	96.0	93.4	92.0	92.7*
<b>Consumption per capita all wines (litres)</b>	21.5	21.1	21.3	20.9	20.8	20.3	21.2	20.2	19.5	19.2*
<b>Export volume (millions of litres)</b>	112.6	142.0	154.7	178.9	169.6	186.9	209.4	213.4	253.0	255.1
<b>Export value (millions of NZ\$ FOB)</b>	991.7	1,041	1,094	1,177	1,210	1,328	1,424	1,570	1,663	1,705

N/A - Not yet available

\* Estimate only

“So even though many people throughout the world are becoming more interested and active in sustainability, in New Zealand it feels more natural that they just want to do right by the land so future generations will be better set up.”

Alyssa Vitrano, Grapefriend.com, USA



# New Zealand Winegrowers membership

(2009–2018)

Wineries by size <sup>1</sup>	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Small</b>	577	605	697	622	617	611	587	581	582	603
<b>Medium</b>	60	61	60	71	71	65	69	78	77	77
<b>Large</b>	6	6	6	10	10	23	17	16	18	17
<b>Total</b>	<b>643</b>	<b>672</b>	<b>697</b>	<b>703</b>	<b>698</b>	<b>699</b>	<b>673</b>	<b>675</b>	<b>677</b>	<b>697</b>

<sup>1</sup> From 2008: Small – annual sales not exceeding 200,000 litres Medium – annual sales between 200,000 and 4,000,000 litres  
Large – annual sales exceeding 4,000,000 litres

Wineries by region	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Northland</b>	14	14	15	16	13	15	14	15	16	17
<b>Auckland</b>	109	111	117	118	116	114	111	110	109	102
<b>Waikato/Bay of Plenty</b>	20	21	17	15	13	13	12	9	8	10
<b>Gisborne</b>	24	26	24	24	21	19	18	18	18	17
<b>Hawke's Bay</b>	79	85	91	84	77	76	75	76	79	91
<b>Wairarapa</b>	61	63	64	64	65	67	67	68	64	69
<b>Nelson</b>	34	36	38	36	38	37	35	36	36	38
<b>Marlborough</b>	130	137	142	148	152	151	140	141	139	141
<b>Canterbury/Waipara</b>	62	61	66	68	70	66	67	64	65	67
<b>Central Otago</b>	103	111	115	120	124	132	127	133	137	136
<b>Waitaki Valley</b>										4
<b>Other Areas</b>	7	7	9	10	9	9	7	5	6	5
<b>Total</b>	<b>643</b>	<b>672</b>	<b>698</b>	<b>703</b>	<b>698</b>	<b>699</b>	<b>673</b>	<b>675</b>	<b>677</b>	<b>697</b>

Grape growers by region	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Auckland/Northland</b>	38	44	17	9	11	11	10	5	4	3
<b>Waikato/Bay of Plenty</b>	13	11	2	2	2	0	0	0	0	0
<b>Gisborne</b>	89	87	57	54	53	48	41	41	36	33
<b>Hawke's Bay</b>	172	171	122	103	104	102	74	71	65	62
<b>Wairarapa/Wellington</b>	44	48	24	24	30	17	14	15	17	13
<b>Nelson</b>	57	62	39	38	40	52	38	36	37	35
<b>Marlborough</b>	524	568	544	551	548	581	535	534	519	510
<b>Canterbury/Waipara</b>	61	60	13	8	14	15	18	14	14	9
<b>Central Otago</b>	75	77	35	35	33	32	32	31	33	33
<b>Waitaki Valley</b>									1	1
<b>Total</b>	<b>1,073</b>	<b>1,128</b>	<b>853</b>	<b>824</b>	<b>835</b>	<b>858</b>	<b>762</b>	<b>747</b>	<b>726</b>	<b>699</b>

Grower Membership has previously been reported as Otago, now split into Central Otago and Waitaki Valley.

# New Zealand producing vineyard area

(2009–2018)

By grape variety (ha)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018**
<b>Sauvignon Blanc</b>	16,205	16,910	16,758	20,270	20,015	20,029	20,497	21,400	22,230	23,102
<b>Pinot Noir</b>	4,777	4,773	4,803	5,388	5,488	5,509	5,514	5,519	5,572	5,653
<b>Chardonnay</b>	3,911	3,865	3,823	3,229	3,202	3,346	3,117	3,116	3,114	3,163
<b>Pinot Gris</b>	1,501	1,763	1,725	2,485	2,403	2,451	2,422	2,439	2,369	2,447
<b>Merlot</b>	1,369	1,371	1,386	1,234	1,255	1,290	1,239	1,198	1,211	1,186
<b>Riesling</b>	979	986	993	770	787	784	767	753	721	707
<b>Syrah</b>	293	297	299	387	408	433	436	426	439	435
<b>Cabernet Sauvignon</b>	517	519	519	305	301	289	275	253	249	249
<b>Gewürztraminer</b>	311	314	313	347	334	376	277	242	229	227
<b>Malbec</b>	156	157	157	140	142	127	129	119	121	119
<b>Sauvignon Gris***</b>							104	113	109	101
<b>Viognier***</b>							129	119	97	94
<b>Cabernet Franc</b>	163	161	161	119	119	113	109	99	91	95
<b>Other varieties</b>	1,782*	2,312*	2,723*	661	728	764	448	430	391	391
<b>Total</b>	<b>31,964</b>	<b>33,428</b>	<b>33,660</b>	<b>35,335</b>	<b>35,182</b>	<b>35,511</b>	<b>35,463</b>	<b>36,226</b>	<b>36,943</b>	<b>37,969</b>

By region (ha)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018**
<b>Auckland/Northland</b>	543	550	556	411	414	392	403	387	387	391
<b>Waikato/Bay of Plenty</b>	147	147	147	24	24	25	16	3	13	13
<b>Gisborne</b>	2,149	2,083	2,072	1,635	1,599	1,915	1,440	1,350	1,246	1,274
<b>Hawke's Bay</b>	4,921	4,947	4,993	5,030	4,846	4,774	4,638	4,641	4,615	4,681
<b>Wairarapa</b>	859	871	882	979	991	995	1,003	1,005	932	1,000
<b>Marlborough</b>	18,401	19,295	19,024	22,956	22,819	22,907	23,452	24,365	25,244	26,007
<b>Nelson</b>	813	842	861	1,011	1,095	1,123	1,141	1,135	1,093	1,170
<b>Canterbury/Waipara</b>	1,763	1,779	1,809	1,371	1,435	1,488	1,428	1,419	1,472	1,475
<b>Central Otago</b>	1,532	1,540	1,540	1,917	1,959	1,932	1,942	1,880	1,886	1,904
<b>Waitaki Valley</b>								41	55	54
<b>Other &amp; Unknown</b>	836*	1,374*	1,516*							
<b>Total</b>	<b>31,964</b>	<b>33,428</b>	<b>33,400</b>	<b>35,334</b>	<b>35,182</b>	<b>35,551</b>	<b>35,463</b>	<b>36,226</b>	<b>36,943</b>	<b>37,969</b>

\* Total corrected to account for assumed vineyard survey underestimation

\*\* Projections submitted in the 2017 Vineyard Register

Source: New Zealand Winegrowers' Vineyard Surveys / Vineyard Register

# New Zealand vintages

(2009–2018)

By Grape Variety (tonnes)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Sauvignon Blanc</b>	177,647	174,247	224,412	181,121	228,781	310,240	216,078	303,711	285,862	296,573
<b>Pinot Noir</b>	27,547	23,655	31,156	23,285	31,775	36,499	25,763	35,661	28,760	35,095
<b>Chardonnay</b>	34,393	26,322	25,580	22,855	27,184	28,985	27,015	29,162	26,843	26,371
<b>Pinot Gris</b>	11,410	12,810	17,787	15,347	22,042	23,880	19,707	24,892	20,755	22,824
<b>Merlot</b>	11,723	8,885	9,092	8,046	10,076	10,756	9,397	9,321	7,714	10,623
<b>Riesling</b>	6,316	5,416	6,118	4,989	5,932	6,013	4,535	5,937	3,880	3,776
<b>Syrah</b>	1,500	2,112	1,741	1,431	2,240	2,178	1,497	1,756	1,733	2,216
<b>Gewürztraminer</b>	2,123	1,556	1,836	1,249	1,788	2,264	1,761	2,221	1,047	976
<b>Cabernet Sauvignon</b>	2,304	2,203	1,667	1,120	1,465	1,742	1,376	1,537	974	1,169
<b>Sauvignon Gris</b>								1,182	944	1,080
<b>Other Whites</b>	865	848	898	618	1,052	1,646	1,294	727	824	250
<b>Malbec</b>	972	761	764	694	825	1,135	586	483	697	782
<b>Muscat Varieties</b>	1,505	793	550	578	634	455	301	329	450	323
<b>Other Reds</b>	262	602	556	307	262	537	457	677	401	456
<b>Cabernet Franc</b>	735	552	488	414	421	582	485	616	373	350
<b>Viognier</b>	784	854	781	839	519	1,148	720	771	266	444
<b>Grüner Veltliner</b>						341	228	276	253	329
<b>Semillon</b>	1,667	1,362	689	596	721	507	425	466	249	385
<b>Alberino</b>										162
<b>Pinotage</b>	694	467	476	292	400	425	494	374	145	153
<b>Arneis</b>				163	220	336	268	257	239	152
<b>Survey total</b>	<b>282,447</b>	<b>263,445</b>	<b>324,591</b>	<b>263,944</b>	<b>336,337</b>	<b>429,669</b>	<b>312,387</b>	<b>420,356</b>	<b>382,409</b>	<b>404,399</b>
<b>Industry total*</b>	<b>285,000</b>	<b>266,000</b>	<b>328,000</b>	<b>269,000</b>	<b>345,000</b>	<b>445,000</b>	<b>326,000</b>	<b>436,000</b>	<b>396,000</b>	<b>419,000</b>

By Region (tonnes)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Northland</b>	148	178	111	92	130	210	203	92	121	113
<b>Auckland</b>	1,615	1,325	1,464	1,220	789	1,392	824	1,267	934	787
<b>Waikato/Bay of Plenty</b>	202	118	51	7	12	63	ND	18	ND	ND
<b>Gisborne</b>	23,093	18,316	14,450	15,590	15,567	16,192	17,280	15,944	16,337	13,000
<b>Hawke's Bay</b>	40,985	38,860	35,533	32,793	38,829	44,502	36,057	42,958	33,679	41,061
<b>Wairarapa</b>	4,421	3,942	3,598	4,271	4,798	5,743	3,559	5,049	3,822	4,592
<b>Marlborough</b>	192,128	182,658	244,893	188,648	251,630	329,571	233,182	323,290	302,396	313,038
<b>Nelson</b>	7,740	5,963	7,854	6,129	7,777	10,494	6,777	10,028	8,540	9,120
<b>Canterbury/Waipara</b>	5,476	5,870	9,485	7,079	8,348	10,962	5,395	12,170	8,240	11,157
<b>Central Otago</b>	6,218	6,196	7,104	8,115	8,407	10,540	8,951	9,177	8,324	11,358
<b>Waitaki Valley</b>										170
<b>Other</b>	421	19	48		50		159	363	16	3
<b>Survey total</b>	<b>282,447</b>	<b>263,445</b>	<b>324,591</b>	<b>263,944</b>	<b>336,337</b>	<b>429,669</b>	<b>312,387</b>	<b>420,356</b>	<b>382,409</b>	<b>404,399</b>
<b>Industry total*</b>	<b>285,000</b>	<b>266,000</b>	<b>328,000</b>	<b>269,000</b>	<b>345,000</b>	<b>445,000</b>	<b>326,000</b>	<b>436,000</b>	<b>396,000</b>	<b>419,000</b>

\* The data shown are the results from the New Zealand Winegrowers' Annual Vintage Survey, 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 Vintage Survey.

ND: No data available

Source: New Zealand Winegrowers' Annual Vintage Surveys

# New Zealand wine exports by market

(2009–2018)

		2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
USA	L	22.181	26.360	32.223	39.481	43.362	48.914	53.858	61.636	72.929	72.701
	NZ\$	223.666	211.613	231.922	251.329	283.651	328.049	372.241	460.600	517.258	521.738
United Kingdom	L	36.212	47.995	52.930	57.657	47.622	51.868	59.745	58.936	74.638	74.435
	NZ\$	267.913	298.656	293.631	284.021	278.415	318.611	353.931	381.809	389.272	386.740
Australia	L	37.343	45.937	45.263	53.474	49.764	53.709	57.528	52.960	59.672	56.059
	NZ\$	323.312	327.098	337.740	380.473	373.048	380.851	362.188	361.677	371.099	366.997
Canada	L	5.055	7.143	5.705	6.509	7.272	7.703	9.583	10.612	11.388	12.776
	NZ\$	49.498	59.141	59.180	70.906	78.177	78.941	94.906	107.372	107.434	127.933
Netherlands	L	2.354	2.746	4.060	4.586	4.128	5.022	6.744	6.801	8.203	9.322
	NZ\$	20.831	21.576	27.369	26.744	26.743	33.383	41.479	44.480	45.439	50.853
China	L	0.544	1.425	1.489	2.200	2.219	1.810	1.858	2.028	2.270	2.520
	NZ\$	6.130	17.165	16.872	25.234	26.868	24.803	27.069	27.593	31.758	37.385
Ireland	L	1.498	1.816	1.844	2.158	2.052	2.212	2.512	2.888	2.986	3.448
	NZ\$	16.501	15.784	15.643	16.326	14.420	16.353	17.472	21.309	21.658	27.183
Singapore	L	1.000	1.031	1.164	1.149	1.285	1.572	1.580	1.567	1.306	1.338
	NZ\$	13.370	12.464	13.984	14.515	16.148	21.326	20.691	20.570	18.596	19.165
Hong Kong	L	0.624	0.947	1.307	1.524	1.570	1.348	1.399	1.283	1.353	1.178
	NZ\$	8.870	11.951	17.629	18.393	20.474	16.853	17.680	17.333	18.553	15.671
Japan	L	0.504	0.674	0.897	1.119	1.152	1.196	1.193	1.150	1.273	1.225
	NZ\$	7.837	9.026	11.017	12.891	13.646	13.908	13.773	13.796	14.565	14.047
Sweden	L	0.604	0.942	1.367	1.459	1.563	1.562	1.630	1.843	1.779	1.521
	NZ\$	6.105	8.747	11.365	11.554	13.090	13.020	13.163	15.276	14.208	12.903
Germany	L	0.530	0.586	0.748	1.429	1.532	2.682	2.073	2.667	1.728	1.685
	NZ\$	5.680	4.954	5.302	7.639	9.532	14.459	10.018	14.501	10.740	9.061
Denmark	L	1.019	1.013	0.976	1.004	0.790	0.864	1.191	0.942	1.252	1.322
	NZ\$	6.510	5.946	6.646	6.566	5.388	6.652	8.042	7.182	8.368	8.594
Norway	L	0.069	0.068	0.169	0.205	0.224	0.334	0.270	0.284	0.320	0.316
	NZ\$	0.621	0.623	1.529	1.483	1.591	2.742	2.045	2.511	2.508	2.648
Finland	L	0.122	0.164	0.276	0.219	0.185	0.259	0.310	0.258	0.248	0.261
	NZ\$	1.502	1.528	2.532	2.134	1.572	2.283	2.455	2.388	2.004	2.340
Others	L	2.987	2.010	4.243	4.706	4.942	5.834	7.947	7.516	11.618	14.979
	NZ\$	33.374	23.358	41.614	46.638	47.758	56.124	67.307	70.938	89.507	101.377
Total	L	112.647	142.032	154.661	178.880	169.669	186.889	209.419	213.371	252.962	255.093
	NZ\$	991.721	1,040.529	1,093.973	1,176.847	1,210.525	1,328.358	1,424.461	1,569.515	1,662.968	1,704.644

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

“The country’s cool climate and intense light... translate into Pinots with lush fruit, charm, complexity, silky textures.”

Elin McCoy, Bloomberg.com USA

# New Zealand wine exports by market

(year end June 2018)

		White 750ml	White Other	White Total	Red 750ml	Red Other	Red Total	Sparkling	Fortified	TOTAL
USA	L	45.581	24.188	69.769	2.725	0.035	2.760	.171	.000	72.701
	NZ\$	373.642	112.110	485.752	34.386	0.284	34.770	1.216	.001	521.739
	\$/L	\$8.20	\$4.63	\$6.96	\$12.66	\$7.96	\$12.59	\$7.09	\$36.94	\$7.18
United Kingdom	L	31.148	39.212	70.693	3.043	.536	3.579	.164	.000	74.435
	NZ\$	210.234	140.939	351.173	31.099	2.862	33.960	1.607	.000	386.741
	\$/L	\$6.68	\$3.59	\$4.97	\$10.22	\$5.34	\$9.49	\$9.80	\$6.11	\$5.20
Australia	L	31.910	19.320	51.230	4.299	.159	4.458	.372	.000	56.060
	NZ\$	239.461	71.606	311.067	49.488	1.316	50.803	5.119	.001	366.998
	\$/L	\$7.50	\$3.71	\$6.07	\$11.51	\$8.27	\$11.40	\$13.76	\$478.50	\$6.55
Canada	L	11.002	.625	11.627	1.096	.001	1.098	.052		12.776
	NZ\$	111.377	2.071	113.448	13.847	.010	13.858	6.281		127.934
	\$/L	\$10.12	\$3.32	\$9.76	\$12.63	\$6.35	\$12.62	\$12.14		\$10.01
Netherlands	L	3.202	5.460	8.662	.559	.024	.583	.077		9.323
	NZ\$	23.403	21.304	44.707	5.332	.125	5.457	.690		50.854
	\$/L	\$7.31	\$3.09	\$5.16	\$9.54	\$5.11	\$9.35	\$8.85		\$5.45
China	L	1.021	.005	1.026	1.444	.034	1.478	.016		2.520
	NZ\$	12.740	.063	12.803	23.845	5.174	24.365	.217		37.385
	\$/L	\$12.48	\$12.63	\$12.48	\$16.51	\$15.22	\$16.48	\$12.96		\$14.83
Ireland	L	3.106	.160	3.266	.160	.003	.163	.019		3.448
	NZ\$	23.981	1.204	25.185	1.760	.005	1.766	.233		27.183
	\$/L	\$7.72	\$7.52	\$7.71	\$11.03	\$1.65	\$10.84	\$11.99		\$7.88
Singapore	L	.948	.004	.952	.324	.002	.325	.062		1.339
	NZ\$	12.601	.047	12.648	5.595	.021	5.616	.901		19.166
	\$/L	\$13.30	\$11.37	\$13.29	\$17.28	\$11.79	\$17.25	\$14.64		\$14.32
Hong Kong	L	.876	.018	.894	.275	.001	.276	.009		1.178
	NZ\$	9.353	.196	9.549	5.923	.092	6.015	.108		15.672
	\$/L	\$10.68	\$11.07	\$10.69	\$21.53	\$148.62	\$21.82	\$12.18		\$13.30
Japan	L	.683	.148	.832	.321	.009	.330	.063		1.225
	NZ\$	6.770	.862	7.632	5.564	.244	5.807	.608		14.047
	\$/L	\$9.91	\$5.81	\$9.18	\$17.34	\$25.91	\$17.58	\$9.62		\$11.47
Sweden	L	1.214	.025	1.239	.253	.005	.258	.025		1.522
	NZ\$	9.309	.118	9.727	2.862	.032	2.894	.283		12.904
	\$/L	\$7.91	\$4.80	\$7.85	\$11.33	\$6.46	\$11.23	\$11.14		\$8.48
Germany	L	.968	.658	1.626	.045	.000	.045	.014		1.685
	NZ\$	5.814	2.441	8.255	.747	.004	.751	.055		9.062
	\$/L	\$6.00	\$3.71	\$5.08	\$16.63	\$15.09	\$16.62	\$4.10		\$5.38
Denmark	L	.665	.550	1.215	.106	.000	.106	.001		1.322
	NZ\$	4.812	2.343	7.155	1.416	.008	1.424	.015		8.595
	\$/L	\$7.24	\$4.26	\$5.89	\$13.38	\$44.46	\$13.43	\$13.32		\$6.50
Norway	L	.260		.260	.052		.052	.004		.317
	NZ\$	1.987		1.987	.615		.615	.046		2.648
	\$/L	\$7.63		\$7.63	\$11.73		\$11.73	\$11.12		\$8.36
Finland	L	.089		.089	.032		.032	.140		.261
	NZ\$	.873		.873	.399		.399	1.068		2.340
	\$/L	\$9.76		\$9.76	\$12.48		\$12.48	\$7.64		\$8.96
Others	L	6.029	7.724	13.753	.930	.127	1.057	.169	.002	14.980
	NZ\$	56.390	28.943	85.333	12.850	1.080	13.930	2.098	.017	101.377
	\$/L	\$9.35	\$3.75	\$6.20	\$13.82	\$8.48	\$13.18	\$12.41	\$15.41	\$6.77
TOTAL	L	139.034	98.096	237.131	15.662	.939	16.601	1.360	.001	255.093
	\$	1,103.048	384.247	1,487.295	195.828	6.602	202.431	14.892	.027	1,704.644
	\$/L	\$7.93	\$3.92	\$6.27	\$12.50	\$7.03	\$12.19	\$10.95	\$22.86	\$6.68

Source: Statistics New Zealand

Note: All litre and dollar figures are in millions

# New Zealand wine exports by variety

(2009–2018)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Sauvignon Blanc</b>	91.527	115.810	131.653	150.883	144.551	160.580	177.776	181.944	217.890	220.065
<b>Pinot Noir</b>	6.183	8.207	9.498	10.560	10.170	10.705	10.886	12.171	12.510	13.171
<b>Pinot Gris</b>	2.036	2.769	2.648	4.091	3.612	4.688	4.479	4.713	7.151	7.740
<b>Chardonnay</b>	4.789	5.234	4.888	5.510	4.914	4.627	5.277	6.063	6.172	4.766
<b>Rosé</b>	0.704	0.559	0.622	0.586	0.490	0.712	0.835	0.942	2.389	3.656
<b>Merlot</b>	1.931	2.618	2.347	2.379	2.059	1.765	1.711	1.906	2.250	2.060
<b>Sparkling</b>	1.976	1.737	1.271	1.392	1.451	1.700	1.441	1.412	1.088	1.167
<b>Riesling</b>	0.776	0.971	1.062	1.057	0.924	0.996	0.113	0.150	1.099	0.962
<b>Cabernet or Merlot Blend</b>	1.067	1.022	1.094	1.254	1.424	1.030	0.754	0.836	0.972	0.798
<b>Other White Varietals</b>	0.081	0.069	0.076	0.118	0.103	0.127	0.282	0.341	0.453	0.420
<b>Syrah</b>	0.155	0.227	0.307	0.309	0.270	0.242	0.954	1.065	0.283	0.375
<b>Gewürztraminer</b>	0.146	0.162	0.306	0.202	0.192	0.212	0.017	0.026	0.182	0.150
<b>Generic White</b>	1.117	0.991	0.532	0.719	0.266	0.043	0.384	0.380	0.085	0.120
<b>Sauvignon Blend</b>	0.128	0.154	0.077	0.140	0.422	0.034	0.014	0.013	0.135	0.102
<b>Sparkling Sauvignon</b>	0.000	0.000	0.000	0.217	0.360	0.107	0.175	0.183	0.059	0.101
<b>Other Red Varietals</b>	0.049	0.060	0.087	0.095	0.085	0.068	0.041	0.048	0.128	0.064
<b>Sweet Wines</b>	0.034	0.027	0.039	0.055	0.038	0.037	0.085	0.134	0.051	0.032
<b>Cabernet Sauvignon</b>	0.014	0.043	0.020	0.030	0.046	0.006	0.012	0.013	0.011	0.023
<b>Generic Red</b>	0.035	0.068	0.022	0.021	0.043	0.002	0.170	0.087	0.126	0.013
<b>Chenin Blanc</b>	0.009	0.010	0.017	0.013	0.016	0.017	0.041	0.028	0.008	0.009
<b>Chardonnay Blend</b>	0.208	0.426	0.415	0.149	0.997	0.047	0.005	0.132	0.007	0.008
<b>Fortified</b>	0.030	0.011	0.001	0.001	0.001	0.004	0.002	0.011	0.001	N/A
<b>Semillon</b>	0.003	0.001	0.008	0.002	0.003	0.008	0.009	N/A	0.051	N/A
<b>Total*</b>	<b>113.000</b>	<b>141.139</b>	<b>156.990</b>	<b>179.783</b>	<b>172.437</b>	<b>187.757</b>	<b>205.460</b>	<b>212.594</b>	<b>253.099</b>	<b>255.802</b>

\* 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

(2009–2018)

By country of origin	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>Australia</b>	20.019	26.502	22.512	21.897	32.565	31.658	25.668	28.715	28.961	31.517
<b>France</b>	1.872	0.984	1.095	1.449	2.023	2.153	2.344	2.869	2.807	2.762
<b>Chile</b>	0.858	0.102	0.062	0.530	1.936	2.456	1.905	1.842	2.397	1.606
<b>South Africa</b>	7.594	5.860	1.710	1.694	2.579	1.732	1.373	1.086	1.492	1.370
<b>Italy</b>	1.523	1.067	0.995	0.858	0.865	0.94	1.023	1.308	1.381	1.786
<b>Spain</b>	0.493	0.207	0.230	0.311	0.430	0.518	0.641	0.578	0.716	.557
<b>Argentina</b>	0.380	0.053	0.051	0.082	0.112	0.161	0.229	0.212	0.223	.265
<b>Others</b>	0.605	0.283	0.631	0.511	0.382	1.106	1.307	0.603	1.958	1.017
<b>Total</b>	<b>33.344</b>	<b>35.059</b>	<b>27.287</b>	<b>27.331</b>	<b>40.892</b>	<b>40.724</b>	<b>34.490</b>	<b>37.212</b>	<b>39.935</b>	<b>40.881</b>

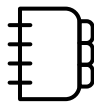
By product type	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
<b>White</b>	11.312	13.773	8.005	7.555	16.76	17.28	11.217	14.088	18.206	21.525
<b>Red</b>	18.633	18.475	16.012	17.011	20.958	20.541	19.830	19.070	17.579	15.036
<b>Sparkling</b>	2.762	2.376	2.760	2.008	2.962	1.849	2.268	2.632	2.651	2.905
<b>Champagne</b>	0.559	0.381	0.447	0.679	0.883	0.896	1.049	1.315	1.397	1.371
<b>Fortified</b>	0.077	0.054	0.063	0.078	0.0211	0.158	0.126	0.058	0.076	0.044
<b>Total</b>	<b>33.344</b>	<b>35.059</b>	<b>27.287</b>	<b>27.331</b>	<b>40.892</b>	<b>40.724</b>	<b>34.490</b>	<b>37.212</b>	<b>39.909</b>	<b>40.881</b>

Note: All figures are in millions of litres

Country of Origin		White	Red	Sparkling	Fortified	Total
<b>Australia</b>	L	18.838	10.912	1.748	.018	31.517
	\$	33.073	58.070	9.987	1.653	101.958
<b>France</b>	L	.273	1.026	1.463		2.762
	\$	3.526	12.483	43.1578		59.234
<b>Chile</b>	L	1.241	0.362	.035		1.606
	\$	1.797	1.231	.023		3.051
<b>South Africa</b>	L	.437	.910	.022		1.370
	\$	.703	1.648	.223		2.582
<b>Italy</b>	L	.162	.835	.789		1.786
	\$	1.359	5.787	6.345		13.490
<b>Spain</b>	L	.028	.442	.083	.004	.557
	\$	.244	2.667	.532	.355	3.750
<b>Argentina</b>	L	.010	.254	.001		.265
	\$	.068	1.472	.026		1.566
<b>Others</b>	L	.536	.294	.165	.022	1.017
	\$	3.330	2.798	1.262	3.400	9.106
<b>Total</b>	L	<b>21.525</b>	<b>15.036</b>	<b>4.276</b>	<b>.045</b>	<b>40.881</b>
	\$	<b>44.099</b>	<b>88.156</b>	<b>61.555</b>	<b>5.526</b>	<b>194.738</b>

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

# Directory



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### New Zealand Society of Viticulture & Oenology

c/o New Zealand Winegrowers

President, **Jeff Sinnott**



## Regional Winegrowing Associations

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### Hawke's Bay Winegrowers Association Inc

Liz Read (Executive Director)  
liz@hawkesbaywine.co.nz

Sue Schmidt (Administrator)  
sue@hawkesbaywine.co.nz  
www.hawkesbaywine.co.nz

### Marlborough Winegrowers Association Inc & Wine Marlborough Ltd

Marcus Pickens (General Manager)  
marcus@winemarlborough.nz  
www.winemarlborough.co.nz

### Nelson Winegrowers Assn Inc & Wine Nelson

Meg Matthews (Marketing)  
marketing@winenelson.co.nz

Jane Docherty (Admin)  
info@winenelson.co.nz  
www.winenelson.co.nz

### Wairarapa Winegrowers Association & Wellington Wine Country

Tania DeJonge (Secretary/Treasurer)  
info@wellingtonwinecountry.co.nz  
info@wairarapawinegrowers.co.nz  
www.wairarapawinegrowers.co.nz

### North Canterbury Winegrowers

Gillian Walsh (Secretary)  
admin@waiparawine.co.nz  
www.waiparavalleynz.com

### Central Otago Winegrowers' Association

Angus Bradshaw (Chairperson)  
angus@grasshopper.co.nz

Natalie Wilson (Membership Services)  
info@cowa.org.nz  
www.cowa.org.nz

### Gisborne Wine Growers Society Inc

Annie Millton (Chair)  
annie@millton.co.nz

Bobby Clark (Admin)  
bobby@gisbornewine.co.nz  
www.gisbornewine.co.nz

### Northern Winegrowers & Grapevine Improvement Assn Inc

Stephen Nobilo  
nwgvig@xtra.co.nz or  
stephen@waimariewines.co.nz

## Sub-Region Winegrowing Associations

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### Wellington Wine Country Ltd

Tania De Jonge (Secretary/Treasurer)  
info@wellingtonwinecountry.co.nz  
www.wellingtonwinecountry.co.nz

### Waiheke Island Winegrowers Association

Jenny Holmes (Marketing Manager)  
jenny@waihekewine.co.nz

### West Auckland Wine Growers

Michael Brajkovich MW  
michael@kumeuriver.co.nz  
www.kumeuriver.co.nz

### Central Otago Pinot Noir Ltd

Tania Partridge (Marketing and Events)  
events@centralotagopinot.co.nz  
www.centralotagopinot.co.nz

### Matakana Winegrowers Inc

Richard Robson (President)  
matakanawinegrowers@gmail.com  
www.matakanawine.co.nz

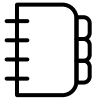
### Northland Winegrowers Association

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

### Waitaki Valley Winegrowers Association

Andrew Ballantyne (Chair)  
ohaumagic@yahoo.com

# Directory



## Key Contacts

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**Wine Export Certification  
Service Manager**

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**Sue Church**

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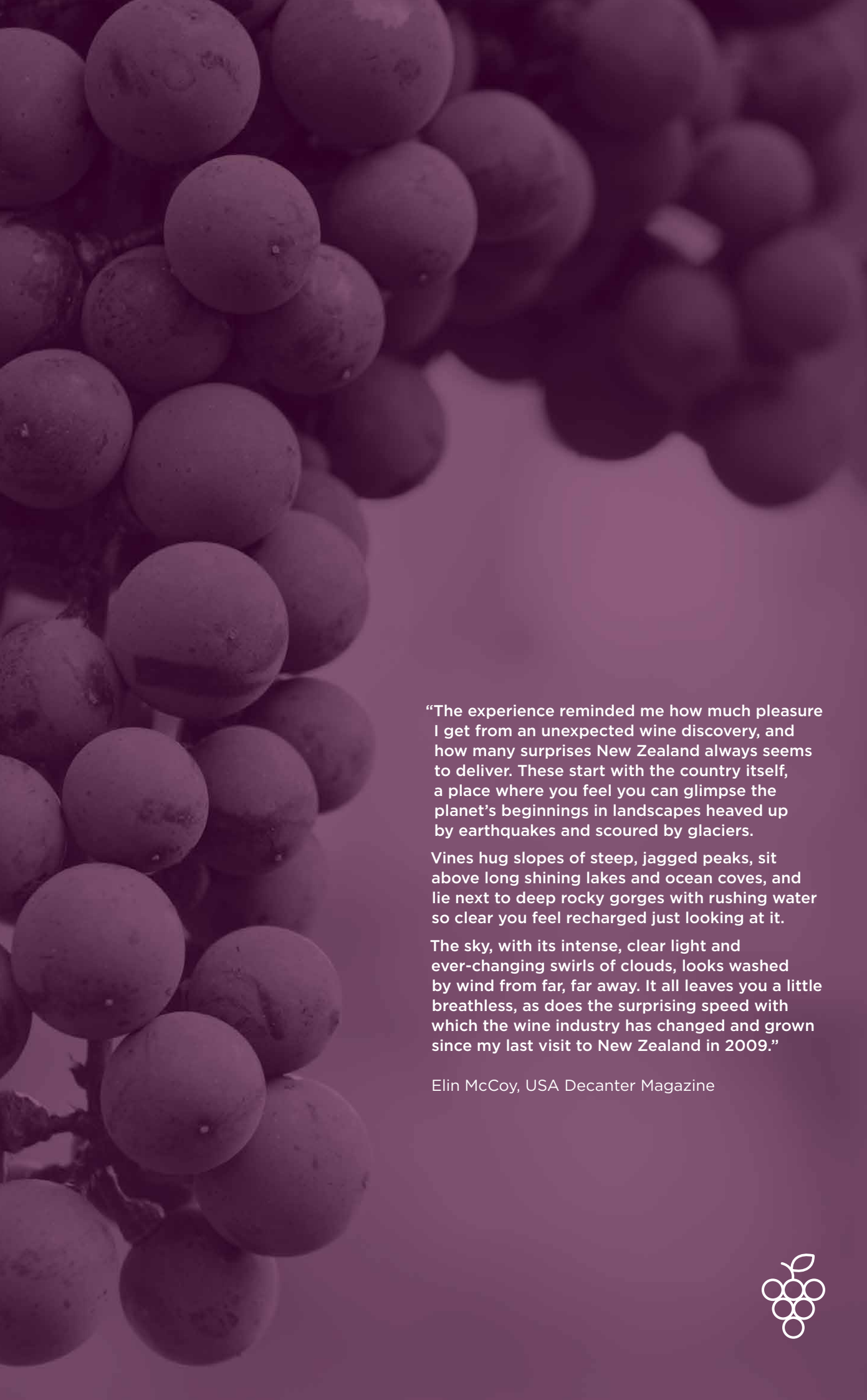


**Global Events Manager**

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**Angela Willis**

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“The experience reminded me how much pleasure I get from an unexpected wine discovery, and how many surprises New Zealand always seems to deliver. These start with the country itself, a place where you feel you can glimpse the planet’s beginnings in landscapes heaved up by earthquakes and scoured by glaciers.

Vines hug slopes of steep, jagged peaks, sit above long shining lakes and ocean coves, and lie next to deep rocky gorges with rushing water so clear you feel recharged just looking at it.

The sky, with its intense, clear light and ever-changing swirls of clouds, looks washed by wind from far, far away. It all leaves you a little breathless, as does the surprising speed with which the wine industry has changed and grown since my last visit to New Zealand in 2009.”

Elin McCoy, USA Decanter Magazine



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