



NEW ZEALAND WINEGROWERS INC

Annual Report 2020



NEW ZEALAND WINE
PURE DISCOVERY

200 YEARS
NEW ZEALAND WINE

200 Years Celebration
Te Whare Rūnanga, Waitangi



WITHER HILLS

Vision

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

Mission

To create enduring value
for our members.

Purpose

To protect and enhance the
reputation of New Zealand wine.

To support the sustainable
diversified value growth of
New Zealand wine.

Activities

Advocacy, Research,
Marketing, Environment

NEW ZEALAND WINEGROWERS INC

Annual Report 2020

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Chair's Report



NZW 200 YEARS CELEBRATION

Perhaps more than any other year in recent times, this was a year of two halves.

During the first half of the year the industry celebrated its past, and looked ahead with optimism. The second half reminded us just how unpredictable the world can be, how crucial it is to plan for the unexpected, and react with agility when the unexpected arrives.

In September we celebrated the 200th anniversary of the day on which the very first grape vines were planted into New Zealand soils, by Reverend Samuel Marsden at Kerikeri in the Bay of Islands. Over 100 winegrowers and others commemorated the milestone with an event at the Waitangi Treaty Grounds and a ceremony at the historic Stone Store at Kerikeri, where a new vine was planted to mark the beginning of the next 200 years.

This was a chance to acknowledge many of the industry's pioneers, and reflect on the difficult journey from colonial outpost through six o'clock closing, to painful economic reforms, and ultimately to a

thriving New Zealand wine industry where - every second of everyday - 80 glasses of its distinctive wine are sold somewhere in the world.

A milestone was reached in February, with the opening of the Bragato Research Institute's Research Winery. This new facility provides us a base from which to set the national research agenda, trial world-first technologies, conduct commercial trials, and connect educators and students to science and industry. Our major levy-funded research projects focus on sustainability (through our vineyard ecosystems pest & disease project), diversification (through our lighter wines project) and quality (through our Pinot Noir project). A potential new project to develop new more resilient Sauvignon Blanc vines is under development.

But these positive notes cannot obscure the turmoil that the COVID-19 coronavirus pandemic has inflicted since it hit the world.

In New Zealand, we were privileged to be able to complete our grape harvest as "essential businesses", but the effort and stress involved in doing so safely was high. Our total 2020 harvest of 457,000 tonnes reflects the near perfect growing conditions experienced in most of the country, and a 2% increase in planted area to 39,935 hectares. The successful harvest was good news for growers who have only one opportunity each year to generate the income to carry them through the next 12 months.

For wineries, the impact on sales of the lockdown and the COVID-19 response has been highly variable. Positively, for those wineries whose focus is on supermarket and 'big' retail channels, sales have increased. This reflects the positive reputation that New Zealand wines have with consumers and retailers.

For other wine businesses the story is more challenging. Physical distancing measures have either halted or significantly slowed on-premise ►

“Despite the challenges of the past 12 months, in the year ended 30 June 2020 our industry managed to achieve record exports totalling \$1.92 billion, up 6% on last year.”

consumption in many markets, but online sales have surged, whilst closure of the border has cut-off the flow of overseas visitors to cellar doors. For those New Zealand wineries whose markets and channels are focussed on tourism or on-premise, sales and orders have fallen significantly.

Some of these impacts were tempered by a brief rise in domestic New Zealand tourism, with regions close to major centres now catering to a surge of Kiwis exploring their own backyard. But the reemergence of community transmission means regions more dependent on tourists will be hurting, and we have initiated some economic research to better understand the likely impacts on smaller wineries, and what government support may be needed.

It is too early to say how the shock of a pandemic will alter consumers' habits, but many are likely to reflect on their values and priorities and may adjust their purchasing decisions accordingly. Ultimately, how New Zealand wine is perceived by the consumer in a post-Covid world will depend on the core fundamentals that research tells us have underpinned our success to date: our reputation, our commitment to sustainability, and the diversity of our offering.

Our reputation was enhanced by the exemplary way winegrowers responded to the COVID-19 crisis, which cemented our place within government circles as an industry that can be relied on. During the Alert Level 4 & 3 periods, we had regular calls with Ministers and senior



MARLBOROUGHNZ.COM

government officials. They made it clear that the way individual members were responding, and the way New Zealand Winegrowers (NZW) was leading the wine sector response, was precisely what they were looking for.

Similarly, although we set up a Safe Harvest Hotline which could be used by the public or members to report any potential breaches of COVID-19 measures or issues with workers, we were pleased that each of the issues reported had a satisfactory explanation, or was readily and willingly resolved.

Recognising the financial strain brought by COVID-19, the NZW Board made the decision to lower this coming year's levy rates back to where they were before last year's 10% increase. In addition, the

Board decided to fund the coming year's Sustainable Winegrowing New Zealand (SWNZ) costs from levy funding, which highlights the importance the Board places on SWNZ and our commitment to sustainability.

Similarly, the strength of our regional winegrower associations is important to the diversity and sustainability of our industry. We are holding more regular meetings with regional chairs, and believe these improved relationships between NZW and the regional associations will help ensure more effective collaboration on key industry issues.

COVID-19 impacted the way we told the New Zealand wine story to trade and consumers, and kept our own members informed. Many promotional

“Our reputation was enhanced by the exemplary way winegrowers responded to the COVID-19 crisis.”



NZW 200 YEARS CELEBRATION

events have needed to be cancelled, and with borders closed, our international visitor programme has been suspended. To meet members' needs in this changed environment, we have responded with a refocused marketing effort, including digital options such as webinars and a more targeted suite of information.

As we look to the future it is clear that, for the short term at least, our sector is going to need to be more self-sufficient in terms of personnel, as access to offshore workers will be limited by border restrictions. With winter pruning nearly complete, our focus is the workforce for vintage 2021. We are working with government agencies to attract new workers to our sector to ensure we have the personnel in place to bring in the 2021 crop.

We are fortunate we already have programmes in place to support our New Zealand based workforce. This year we held the Women in Wine mentoring programme for the second year, and due to popular demand added a NZW mentoring programme, available to all young

people irrespective of gender. We held our first Young Leaders' Forum to bring together and challenge twenty winegrowers from around the country, and both our Young Winemaker of the Year and Young Viticulturist of the Year Competitions are attracting an excellent calibre of contestant.

Despite the challenges of the past 12 months, in the year ended 30 June 2020 our industry managed to achieve record exports totalling \$1.92 billion, up 6% on last year and domestic sales of around \$500 million.

Looking forward it seems likely that New Zealand's borders will be largely closed for the coming year. We will be forced to re-think parts of our workforce, re-imagine our tourism activities, and cope with what seems likely to be a global recession.

For some grape and wine businesses, the outlook may be challenging. But as an industry, we will get through it. By investing in the New Zealand wine category, by focussing on good business practices, with good leadership and by keeping our eye on the fundamentals of our past and

current success – our reputation, our diversity and our sustainability - we will build a strong foundation from which to continue to grow, and expand the global presence of New Zealand wine.

In conclusion I want to acknowledge the sterling efforts of our CEO and staff particularly during the period of Covid lockdown and subsequent. The initial effort to ensure we could operate as essential businesses followed by the constant flow of information to help ensure the safety of members and their staff during vintage was no small task. Working from home, reduced hours, reliance on zoom meetings and the absence of the “water cooler” conversations applied additional pressures and that they have shepherded our industry through in these circumstances deserves all our appreciation.

Their challenges and those of the Board are by no means over, but our reputation, diversity and sustainability put us in good stead to navigate the turbulent waters ahead. ■

Advocacy

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

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

Providing COVID-19 support to winegrowers

New Zealand responded to the outbreak of COVID-19 by imposing a strong national stay-at-home order, which activated just as harvest was beginning. Ahead of that, having observed early lockdown measures being implemented overseas, NZW had already begun preparations to ensure the New Zealand government would recognise grape harvesting and winemaking as "essential" under any lockdown.

The government's response to the pandemic was swiftly initiated as a set of high-level principles. It was deliberately left up to industry to design and implement those practices. NZW supported this devolved approach, but it required an unprecedented response effort.

The NZW Advocacy team worked tirelessly to ensure that our key contacts at MPI and other government departments knew exactly how COVID-19 restrictions were affecting winegrowers, and to ensure the government's constantly evolving

requirements and support measures were clearly communicated to members.

We set up a virus response information portal on the NZW website, response email addresses and two dedicated 24/7 hotlines – one to respond to member compliance queries, and the other to allow rapid reporting and response for any public concerns around harvest. Members generously shared their own crisis procedures and protocols, which we synthesised into generalised guidance for members, updated every time new requirements or new guidance was issued, and as we clarified requirements for labour movement, accommodation, transport and dozens of other issues with MPI. The resulting COVID-19 webpages had 35,000 page views, and there were over 21,000 user interactions with these pages, including downloads of our various documents, views of embedded videos etc. We responded to many hundreds of calls and emails, and offered members a range of webinars both on the requirements, and to provide support.

As the alert levels lowered (and as harvest concluded), we were able to move our focus to helping cellar doors, restaurants and other wine tourism businesses reopen in a safe way. ►



MISTY COVE

With our borders likely to remain closed for some time, our efforts now are directed to helping members plan for the coming seasons without their usual migrant workforce. We have also initiated a business study to ensure we have an accurate understanding of the impact of COVID-19 on smaller wineries, so that we can advocate for our industry's share of the government support that is available.



MISTY COVE

Workforce activities

In addition to the labour challenges COVID-19 has brought, we have been working hard to ensure members' interests are represented in a range of government proposals to change the immigration and employment framework. This will include new accreditation requirements before employers can access migrant workers and proposals on the introduction of "Fair Pay" agreements. The government has announced COVID-19 recovery funding support for training new entrants and attracting workers to the Primary Sector, and Advocacy has been working hard to ensure the wine industry is strongly positioned to benefit.

Other work continues on developing a winegrower-specific process to ensure members can readily provide assurances to their customers and the government about ethical treatment of workers.

Advocacy Compliance Roadshow

In September, members of the Advocacy team met with over 100 winegrowers across seven centres. This provided an opportunity to update members on

key compliance issues (including employment, immigration, winemaking requirements, spray use, customs and excise, and other areas), and hear first-hand about concerns and issues.

Market access opportunities for New Zealand wine

During the year negotiations with the European Union towards a free trade agreement began in earnest. Despite the disappointment of the EU's unrealistic opening positions, some signs are emerging that they actually are interested in a deal that would benefit winemakers in both markets. Only time will tell; we have no interest in a deal that does not remove many of the irritants that EU rules impose. Negotiations towards an agreement with the United Kingdom are just beginning. As an important wine trading hub, we expect the UK may be much less protectionist in their approach than the EU. The uncertainty of Brexit continues to pose challenges for our exports to the UK.

Cellar door licensing challenges

Wine tourism is core business for many New Zealand wineries. These activities include cellar door visits,

restaurants, winery and vineyard tours, and accommodation. To support the growing importance of wine tourism, NZW has been working steadily with officials since 2018 to seek technical improvements to the Sale and Supply of Alcohol Act that would support wine tourism. Specifically, we asked:

- that cellar doors be allowed to charge for wine samples (rather than having to provide them free); and
- for changes so that a winery with an on-licence can also hold a cellar door off-licence without having to meet the "85% of revenue" test.

Disappointingly, even though these changes are well aligned with the objects of the Act, and would support small and medium wineries in their recovery from COVID-19, Justice Minister Little advised us in late June that any changes will have to wait until Labour's next term, when they intend to review the Sale and Supply of Alcohol Act. We are grateful for the detailed case studies and examples that members provided us, and will resume this work as soon as possible after the election.



Leadership and Communities

This year we have grown our important Leadership and Communities initiatives, expanding them and introducing new activities. All are aimed at helping individuals thrive within our sector, reaching their personal goals, and forming supportive networks to strengthen our industry.

The Young Viticulturist and Winemaker of the Year competitions highlight how many passionate and talented young leaders we have coming through. Following the highly impressive speeches the participants delivered in their finals last year, we held a Young Leaders' Forum in November. Twenty winegrowers under thirty five, from different roles and regions around the country,

came together to learn from some of New Zealand's top agricultural and horticultural leaders, as well as work together on ideas for the future to share with the NZW Board. We hope to provide further opportunities to develop these ideas.

The continuing success of the Women in Wine mentoring program led to many requests for a general NZW mentoring programme, open to all. This was launched in November 2019 and we plan to continue running this each year.

The Women in Wine initiative continues to gain momentum and membership throughout our regions, with women winegrowers gaining confidence and opportunities to further their careers through networking and support. The inaugural

International Forum of Women in Wine in Italy sponsored our Women in Wine NZ Chair and national coordinator to attend. They proudly shared the story of our successful mentoring programme and other initiatives, and gathered useful ideas for new activities from other countries.

Early in the year we surveyed members to build a better understanding of "Our People". One finding of note was that 7% of members said they had suffered from mental health issues. COVID-19 will only have increased these pressures, so NZW is planning workshops and materials to help ensure members feel supported and are more alert to when colleagues may need extra support. ►

Submissions

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



LAMONT WINES

International

Upgrading the ASEAN Australia New Zealand Free Trade Agreement, MFAT

July 2019

EU-NZ FTA Geographical Indications Framework, MFAT

April 2020



YOUNG VITICULTURIST OF THE YEAR

Domestic

Climate Change Response (Zero Carbon) Amendment Bill, Environment Select Committee

July 2019

Alcohol Advertising and Promotion Code, Advertising Standards Authority

August 2019

Proposed National Policy Statement for Highly Productive Land, MPI and MfE

October 2019

Healthy Waterways consultation, MfE

October 2019

Pregnancy Warning Labels on Alcoholic Beverages, FSANZ

October 2019

Priority Products and Priority Stewardship Scheme Guidelines, MfE

October 2019

Fair Pay Agreements, MBIE

November 2019

Temporary Migrant Worker Exploitation, MBIE

November 2019

MPI Cost Recovery Updates for Biosecurity and Wine Act approvals, MPI

December 2019

Climate Related Financial Disclosures, MfE

December 2019

Food Regulation Policy Guideline consultation, Australia New Zealand Ministerial Forum on Food Regulation

January 2020

Climate Change Response (Emissions Trading Reform) Amendment Bill, Environment Select Committee

January 2020

Immigration (COVID-19 Response) Amendment Bill, Epidemic Response Select Committee

May 2020

Organic Products Bill, Primary Production Select Committee

May 2020

Proposal to amend Sale and Supply of Alcohol Act, Ministry of Justice

Various dates ■



Research

Bragato Research Institute drives world-leading innovation for the wine industry - from stretchy science through to the practical application of science across vineyards, wineries and supply chain.

Industry impact and key outcomes

Bragato Research Institute (BRI), the research arm of NZW, manages all NZW levy-funded research, as well as undertaking research with additional partners. With levy funds increasingly focused on applied research into immediate needs and issues, BRI is building in-house capability—people, skills and facilities—to manage a portfolio of work to address longer term challenges and opportunities. To collaborate in executing this research, BRI has signed agreements with

major partners, such as Plant & Food Research - Rangahau Ahumāra Kai, to ensure additional benefits to the industry, avoid duplication of efforts, and to strengthen relationships with longstanding research partners of NZW.

In 2020 BRI commissioned New Zealand Institute of Economic Research (NZIER) to estimate the impact of research and development (R&D) in the wine sector, and the impact of BRI activities on the Marlborough region, the national winegrowing industry and the wider economy.



OPENING OF BRAGATO RESEARCH INSTITUTE RESEARCH WINERY

The reports' authors use three industry-funded projects - mechanical shaking, timing of pruning, and trunk disease - to examine the contribution of research to annual economic growth of the wine industry. Using that information as well as past studies, they concluded that research has led to annual economic growth of the wine industry between 20% and 25%, with a boost to the national economy driven by higher productivity. Additionally, NZIER found that wine R&D leads to:

- an increase in exports by \$41 million
- an increase in the size of the national economy by \$64.5 million



- a boost in household consumption by \$37.2 million
- and 258 new jobs for the economy.

This financial year (2019-2020) was BRI's second full year in operation, and NZIER found it "has created a unique business model adding value to the Marlborough and national economies." Additionally, NZIER estimates that BRI has added:

- an \$8 million increase in the size of the national economy, with 30 new jobs for New Zealand, including,
- a \$2.2 million increase in the size of Marlborough's economy.

The report concluded, "The industry

must expect to continue with its R&D in order to maintain its prior gains and make new ones." [Click here](#) for a two-page summary and full copy of the report.

Inaugural harvest for research winery

The research winery opened in February on the Marlborough Research Centre campus, adjacent to NMIT and key research partners, such as Plant & Food Research - Rangahau Ahumāra Kai. From here, we have partnered with industry and other research organisations to set the national research agenda, trial world-first technologies, conduct commercial

trials, and connect educators and students to science and industry. With the first juice arriving in March, just before the uncertainty of lockdown and COVID-19 restrictions, BRI was not deemed an essential service. This meant current field trials couldn't be harvested and processed, losing this vintage's data. However, the research winery was permitted to operate as staff worked and lived in the same bubble. Led by Dr Tanya Rutan, Research Winery Manager, all commercial trials were successfully completed this inaugural year. ►

Connecting education to wine research

The past year has seen several initiatives to ensure BRI's collaboration with educators to both guide students to the wine industry and encourage diversity in science. From student experience in the research winery to BRI staff as guest lecturers, formal agreements were also signed to illustrate BRI's commitment to Vision Mātauranga. Vision Mātauranga is the Government's science policy framework to unlock the science and innovation potential of Māori knowledge, resources and people for the benefit of all New Zealanders. Funded by the Ministry of Business, Innovation and Employment, BRI is committed to the vision and embedding it into our research, purpose and practices.

In 2020, a memorandum of understanding (MOU) was signed with [Pūhoro STEM Academy](#) for the 2020-2021 academic year to provide a scholarship and internship. This opportunity is for a Māori student studying a tertiary qualification in a science-related field with relevance to the wine industry.

A separate MOU was signed between BRI, Eastern Institute of Technology in Hawkes Bay, Otago Polytechnic, Nelson Marlborough Institute of Technology and Marlborough Research Centre to collaborate on research and student learning. The first initiatives from these collaborations will launch in the 2020-2021 financial year.



BRAGATO RESEARCH INSTITUTE

THE INDUSTRY'S 3 MAJOR LEVY-FUNDED PROGRAMMES:

Vineyard Ecosystems Programme: Pest and Disease, Sustainability

Objective: To research and understand how management choices affect New Zealand vineyards, to increase sustainable winegrowing in the future. The programme started in 2015 and runs to December 2021.

Total Funding: \$7m comprising \$3.5m each from New Zealand Winegrower's levies and Ministry of Business, Innovation and Employment Partnership Fund.

Research: The Vineyard Ecosystems Programme examines how vineyard management activities can enhance biodiversity and improve grapevine performance. Work now focuses on the complex statistical modelling and analysis needed to verify trends and indicate cause and effect. While these efforts continue through to the end of the programme in 2021, applied research areas are now being summarised for industry uptake, including reduced herbicide applications for weed management, providing alternative habitats for mealybug control, and pruning wound protection against grapevine trunk disease.

Lighter Wines Programme: Diversification, New Wine Styles

Objective: Position New Zealand as the world leader for high-quality, naturally grown lower-alcohol wines. The programme started in 2014 and runs to December 2020.

Total Funding: \$16.97m comprising \$8.84m from industry levies and participating companies, and \$8.13m from Ministry for Primary Industries' Primary Growth Partnership (PGP).

Research: Health and wellness consumer trends are not only in clear alignment with the NZ Lighter Wines Programme but look set to continue far beyond its conclusion at the end of 2020. The lower-alcohol wines developed via the NZW/PGP research partnership represent a new product category, one that can already be celebrated for market leadership and critical acclaim.

Participating companies now offer 45 products in the no, low, and lower-alcohol niche. Export sales increased by 57% in the year to May 2020, reaching \$8.8 million, while annual domestic sales held their own at \$31.4 million.

As a result of the R&D investment, NZ Lighter Wines deliver premium, full-flavoured wines that frequently win awards in open-class wine competitions. In the past 12 months, there have been 50 new export trade listings, primarily in Australia, Canada and the United Kingdom. Internationally, New Zealand is now considered the world leader in this rapidly developing wine category.

Pinot Noir Programme: Quality and Productivity, Diversification

Objective: Growing returns through tools enabling high-quality Pinot Noir production at higher yields. The programme began in 2017 and runs to September 2022.

Total Funding: \$10.3m comprising \$1m from industry levies and \$9.3m from MBIE's Endeavour Fund.

Research: The programme is nearing the end of its third year. Good progress has been made in the research fields of sensory perception, chemistry, and viticultural and winemaking techniques, which have allowed researchers to begin formulating hypotheses around the definitions and measurements of quality for New Zealand Pinot Noir. The past year saw the expansion of the programme with the addition of two projects to examine the effect of macromolecules (polysaccharides) and their content in wine, as well as further understanding of green/herbaceous sensorial perception and implications for product acceptance. ■



BRAGATO RESEARCH INSTITUTE



BRAGATO RESEARCH INSTITUTE

To find out more about the **2020/2021 Bragato Research Institute Research Projects** visit bri.co.nz/current-research/.

In addition to research reports, two dozen articles were written for NZ Winegrower Magazine over the course of the year

with progress or final results on levy-funded research. Ranging from Pinot Noir profiling to trunk disease, the breadth of the articles illustrate the breadth of our research programme. These articles can all be found at bri.co.nz/news

Sustainability

Sustainability has been a fundamental part of the New Zealand wine industry for well over 20 years. Over 96% of New Zealand's vineyard area is Sustainable Winegrowing New Zealand certified.

Ongoing commitment to sustainability

Over the past 12 months, NZW has implemented a range of strategic and operational initiatives, intended to refocus and reinforce our industry's commitment to sustainability.

These have included:

- The appointment of a General Manager Sustainability in September 2019 and subsequent structural changes to the Environment Group at NZW;
- The launch and ongoing delivery of the Sustainable Winegrowing New Zealand (SWNZ) scorecard review project;
- The refocus on six core areas of sustainability: water, waste, pest and disease, climate change, people and soil.
- The decision to implement a phased withdrawal of organophosphates from the Spray Schedule;
- The decision to close the SWNZ Continuous Improvement pilot and launch the Sustainability Guardians programme;

- Adopting key environmental industry health indicators of sustainability;
- Setting a climate change goal for the industry to become carbon neutral by 2050 and implementing a climate change work programme;
- Re-confirming the goals, objectives, and performance indicators of the NZW biosecurity strategy.

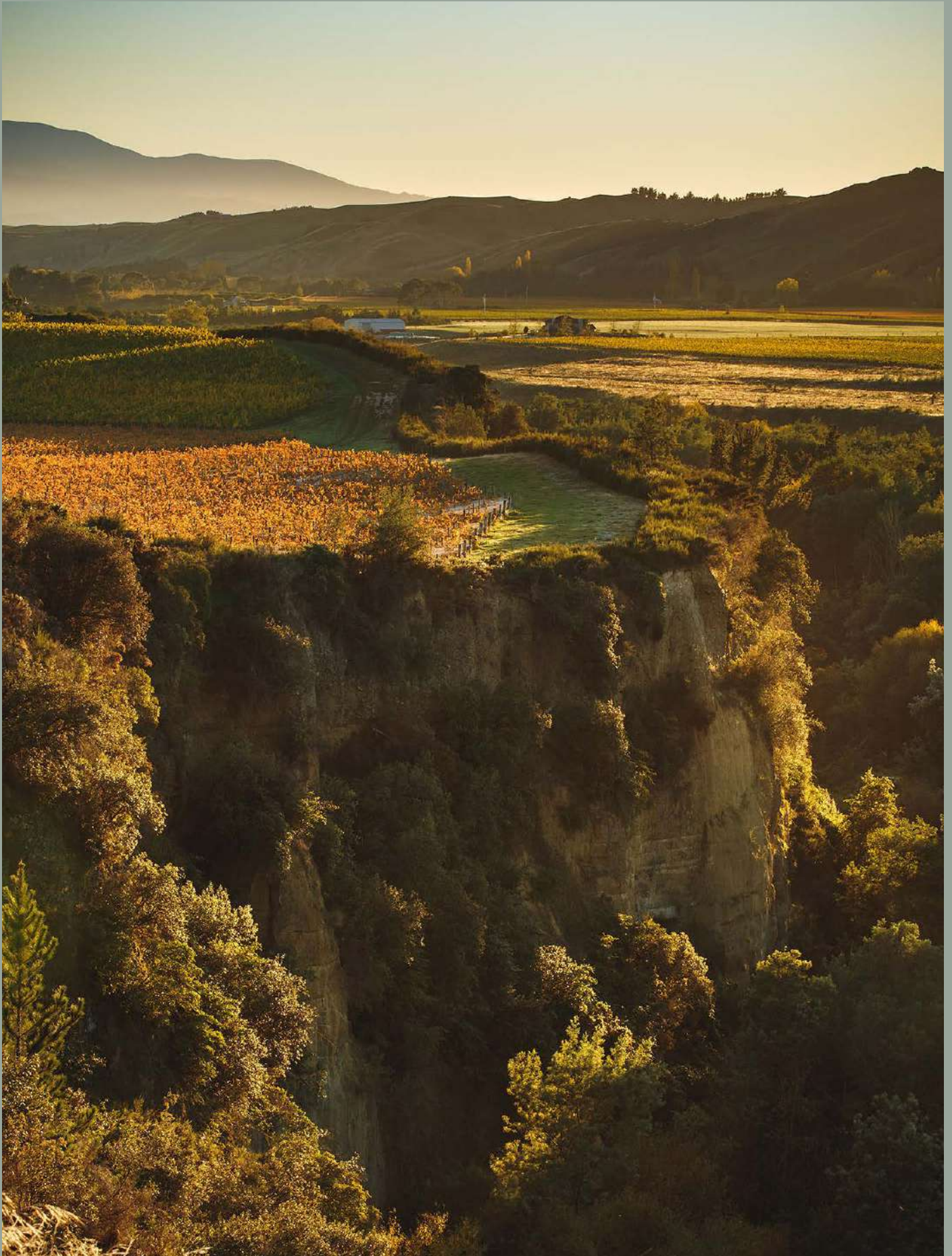
Taken together, these initiatives signal a growing momentum that will take our sustainability initiatives to a new level. Collectively, they help to protect and enhance the reputation of New Zealand wine, and act as a key differentiator for our product as the industry recovers from the impacts of COVID-19.

Improving the relevance of SWNZ

Over the past nine months, NZW and two Scorecard Technical Advisory Groups have been working to streamline the SWNZ

vineyard and winery scorecards, around the six focus areas. This work seeks to strengthen the industry's reputation for sustainability while improving the relevance of SWNZ for members' businesses. The new scorecards are expected to be delivered by November 2020. These revised scorecards will help to ensure SWNZ remains a world-leading sustainability programme, with an increased focus on quantitative data. ▶





CHURTON VINEYARD



CHURTON VINEYARD

Spray Days

Over 900 people attended Spray Days workshops throughout the country in 2019. This popular education event was also held in an online forum in May 2020, through a webinar and ‘question and answer’ session on preventing grapevine trunk disease. This session was a great reminder of the ability of the team to deliver technical information in a simple and applicable manner in a virtual format.

The resurgence of COVID-19 in August has meant that the 2020 spray days programme will be delivered online. We hope to return to the regions with this key event during 2021.

Importance of independent certification

Independent certification is a key element of SWNZ’s international reputation, helping to protect the industry from potential accusations of greenwashing. 792 audits were undertaken in the 2019 season, split between 642 full site audits and 150 desk-top audits. Moving forward the impact of COVID-19 will lead to major changes in the way audits will be conducted, with remote audits, virtual connections, and a focus on education coming to the fore.

Growing emphasis on the impact of climate change

Over the past year the Board has taken several steps to highlight the importance of the risk posed by climate change to the New Zealand wine industry, including setting a challenging goal for the industry to become carbon neutral by 2050.

To commence our journey towards this goal we have engaged Toitū Envirocare to assess the industry’s current carbon production footprint, and to develop guidance around the key sources of emissions in the winery and on the vineyard. The results of this research will provide a benchmark on current industry performance and should be available by the end of the 2020 calendar year.

This work will complement the inclusion of specific climate change questions in the SWNZ scorecards and further work to promote best practice through the Sustainability Guardians programme. In addition, NZW has joined the Toitū Envirocare Carbon Reduced Certification Programme. This will help us to learn how we can manage the organisation’s impact on climate change and pass these learnings on to members.

“If I had to pick one wine country that was greener than others it would be New Zealand, where many producers follow a “reduce, reuse, recycle” mantra.”

JANE MACQUITTY, THE TIMES UK

Organics - Great wine is in our nature

Organic winegrowing in New Zealand continues to go from strength to strength. At vintage 2019, New Zealand had 111 certified organic grape growers and 73 certified organic wineries, ranging from artisanal family operations to large companies with multiple organic sites.

Meanwhile, market enthusiasm for New Zealand organic wines is strong. By popular demand, Organic Winegrowers New Zealand (OWNZ) ran an even bigger week of events for this year's [Organic Wine Week](#) in September 2019, with member wineries participating in retailer tastings, in-store promotions, masterclasses and winemaker dinners in New Zealand and overseas, while social media hummed with activity. OWNZ also continues to run grower education events, with a series of regional seminars on cover crops attracting record numbers in the spring.

A soil monitoring project by OWNZ yielded further positive results for organic production this year; when researchers revisited the [Organic Focus Vineyards](#) eight years after the beginning of organic conversion, they found encouraging results for soil quality, in research co-sponsored by the Bragato Research Institute. OWNZ and NZW continue to work in collaboration to grow the New Zealand organic industry.

Biosecurity - Building an industry of biosecurity champions

Maximising the effectiveness of the New Zealand biosecurity system for members remains the key goal of NZW's biosecurity activities. Over the past year our primary focus has been promoting member participation in biosecurity. 2019 marked the initiation of the Being a Biosecurity Champion programme, which works with contestants in the Young Viticulturist competition to help them develop biosecurity plans to mitigate risks on their own sites. Similarly, 2019 saw the launch of the first wine industry “biosecurity week” involving a range of initiatives aimed at increasing biosecurity awareness, with both programmes returning in 2020.

The Biosecurity Team continues to work in partnership with government through the Government Industry Agreement (GIA) for Biosecurity Readiness and Response. This year the industry has reaped the rewards of this ongoing work, with brown marmorated stink bug (BMSB) detections at the border significantly reduced from previous risk seasons. This reduction was in part due to stricter regulations at the border governing the importation of goods from high risk countries; an excellent result for the industry. In addition, by the end of 2020 NZW expects to sign two additional GIA agreements with the crown and other industry bodies. These agreements will see the development of:

- A response plan that sets out how New Zealand would respond to an incursion of *X.fastidiosa*, the bacteria responsible for Pierce's Disease one of our most unwanted pests; and
- An agreement to introduce a plant producers' biosecurity scheme that will help to manage the risk of an incursion through the commercial plant nursery pathway.

Both these agreements will help to mitigate the risk of a significant incursion, building industry capability to manage biosecurity risk.

The Biosecurity team made the following submissions to Government on behalf of members:

- Submission on the proposed Standard for Offshore Facilities Holding and Testing Plants for Planting submitted 29/7/2019
- Submission on the import health standard *Prunus* Plants for Planting submitted 7/8/2019
- Submission to EPA on 18/9/2019 regarding Giant Willow Aphid Biological Control Agent ■



NZW 200 YEARS CELEBRATION

Marketing

Developing and supporting the growth of New Zealand wine.

The past 12 months has been a year of two halves for the marketing team, from celebrating 200 years since the planting of the first vines in New Zealand, though to experimenting and employing new approaches to keep New Zealand wine top of mind in a changing world. Despite the uncertainty, we have continued our efforts to ensure New Zealand wine remains frequently mentioned, bought and praised around the globe, amongst the challenging conditions COVID-19 has created.

New Zealand wine's sustainability story on the world stage

One of the key pillars that differentiates New Zealand wine on the global stage is our commitment to sustainability and our world leading practices.

Last September the 'New Zealand. Naturally' events took place in San Francisco, Toronto and New York, with the objective to engage and immerse our guests in what sustainability means to New Zealand, while showcasing organic, biodynamic, natural, vegan wines, supported by leading wine opinion leaders. The same month, Organic Wine Week provided another opportunity to focus on our environmental goals. In the UK we celebrated with a panel discussion and masterclass, followed by a walk around tasting of over 80 wines; the largest focused organic tasting NZW has held internationally.

In July 2020, NZW partnered with leading North American wine publication, The Wine Enthusiast, for a webinar entitled 'New Zealand wine:

“Sparkling wines here were stunning, Pinot Noir & Syrah that knocked my socks off... It is high time that we all discovered more about the wines created in New Zealand.”

AMY LIEBERFARB, WINE BLOGGER, USA

Doing it Right for Future Generations'. This session focused on telling our Sustainability story through the lens of Kaitiakitanga; and provided an opportunity to reinforce the messages New Zealand is being recognised for around the world right now; the care we have for our country and our people. Nearly 500 people tuned in, with the recording continuing to be shared afterwards with further communication support from The Wine Enthusiast.

Celebrating diversity

Heralding the diversity of the New Zealand wine industry is another central theme to the NZW's marketing message. It is a lens through which all our activities are seen.

October in Melbourne and Sydney we trialled a wine tourism activation at the popular consumer event Pinot Palooza. The stand brought to life three wine tourism journeys featuring seven New Zealand Pinot Noir wine regions. Engagement on the stand was high with great interest in the itineraries and the range of wine tourism experiences available at New Zealand wineries, with attendance reaching 3500+ in Melbourne and 2500+ in Sydney.

At the UK Annual Trade tasting in January there were five feature tables (showcasing Rosé, Alternative varieties, and Shades of Pinot), four insightful masterclasses, two consumer events and an organic wine bar. Across the three European events in UK, Ireland and Denmark, approximately 600 wines were shown to over 1000 visitors with an extensive range of styles and varieties on offer.

Furthering the discussion on diversity and innovations of New Zealand wine, we held an event in London about how our industry is learning to master the art of producing premium quality, naturally lighter in alcohol wines. Seven New Zealand lighter wine companies provided 16 lighter in alcohol wines across five different varietals. General opinion of the attendees was that the New Zealand

lighter wines were full flavoured and of premium quality, and well positioned to cater to the growing demand for lower alcohol wines. An estimated 9.6 million UK consumers were reached through the ensuing positive media coverage.

In China, the diversity of Sauvignon Blanc was a theme during two seminars at ProWine Shanghai ▶



NZW 200 YEARS CELEBRATION



UK ANNUAL TRADE TASTING

in November. The session explored New Zealand Sauvignon Blanc via five wines representing different regions, subregions and styles, with over 45 wine professionals attending.

Adapting in a changing world

Providing our membership with the most relevant timely information to help make business decisions in this challenging year has been a crucial focus.

What started out as an initiative to help our members access marketing support more readily, exploring digital options such as webinars became the only option after COVID-19 struck. A popular series of webinars focused on topics that were most relevant to members' needs during the pandemic; including digital marketing, social media and bringing our online resources 'to life', such as our Guides to Market.

NZW's global footprint allowed us to bring some of the best thinking in the industry to our members, with experts including Paul Mabray and Polly Hammond on Digital Transformation, Richard Siddle of The Buyer in the UK, and Ian Ford of Nimbility Asia.

Keeping New Zealand wine top of mind online

In the virtual world our efforts to remain connected to trade and consumers also has seen some new fresh approaches. We saw 'online firsts' in the area of speed dating, expos and comparative tastings and discussion panels across continents.



Speed dating with LCBO Buyers

Traditionally, the Canada wine fairs host speed dating sessions with key buyers and media. This year, the LCBO agreed to participate in virtual speed dating to allow our category the face time we would normally receive. Encouragingly, the LCBO was very interested in exploring alternative varieties through these meetings as we discussed an 'Off the Beaten Path' feature for future releases. Feedback from the LCBO was very positive, and they enjoyed learning the various winery stories, building understanding about what makes each one unique; providing an interesting opportunity for consumers in Ontario.

Lookvin Virtual Wine Expo

NZW participated in its first ever entirely online expo, the Fine Wine Show in May 2020, hosted by Lookvin

and supported by the food industry's leading B2B website 21food.cn. The show provided an online platform for both international producers and local suppliers to present their wines, establish contacts and get to know the China market following COVID-19's impact. The New Zealand wine pavilion ranked number one via PC and number two on the mobile app, with over 43,000 unique visitors and 210,000-page views.

Oregon New Zealand Pinot Collaboration

In the UK in June, we held our first virtual tasting, teaming up with the Oregon Wine Board and private wine members club, 67 Pall Mall. Titled 'Wine from the Edge', the tasting focused on Pinot Noir, with six wines on show - three selected from each country. The samples were dispatched



UK ANNUAL TRADE TASTING

“It’s difficult to put my finger on a single thing, but I would say the incredible hospitality of the people, the amazing landscape, and my fellow Sommiters made the experience once that I’ll never forget...”

EZRA WICKS, WINE DIRECTOR, BAR FERDINAND, SEATTLE



NZ WINE OF THE YEAR JUDGING, 2019

in mini bottles by 67 Pall Mall to 59 leading members of the trade media, wine writers, key retailers, educator and influences.

New Zealand Wine Diaries

Targeting a global trade audience, a conversational webinar series ‘The New Zealand Wine Diaries’ was launched examining relevant topics to our wine industry, with over 600 people tuning in from around the world.

Leading Master Sommeliers John Szabo, MS from Canada, Ronan Sayburn MS from the UK and David Keck, MS from the USA were invited to become our resident Masters, and each session they were joined by a Guest Master from New Zealand to facilitate the discussion. Topics included “Sauvignon Blanc - Get Past

the Gooseberry, Let’s Talk About the Wine”, “Chardonnay & Pinot Noir at the other 45th Parallel” and “New Zealand Wine in a Post-Covid World”. The final edition will take place in September and explore “Organic Wine - Not just for Hipsters Anymore”. ■

Wine Tourism



262

wineries
offer over

494

wine tourism experiences
listed on nzwine.com/visit



SIP

236



DINE

120



STAY

66



PLAY

72

Source: New Zealand Winegrowers
nzwine.com/visit website - JULY 2020



LE GRÁ VINEYARD AND WINERY, JET PRODUCTIONS

“What’s special about New Zealand wines? If you love supporting wines from boutique wineries and family farmers, New Zealand should be at the top of your list: A full three quarters of the country’s wineries are producers working with less than 20 hectares.”

SARAH TRACEY, *MarthaStewart.com*

Media Generation



With international borders closed, NZW’s Visit Programme halted overnight and has morphed into a Global PR Programme, to ensure New Zealand wine continues to be a vibrant part of the media conversation on and offline.

Before the borders closed, the Visit Programme was in full swing. We said farewell to our final guest of the year on 13 March, just 6 days before the border closure came into full effect. In lieu of key influencers being able to travel to New Zealand, we have launched a media hub of relevant New Zealand wine stories journalists can access for their publications. Read more [here](#).

Equivalent Advertising Value

\$1.5 MILLION

(target \$1m)

—
Reach*

217,908,581

* Reach is the number of people likely to be exposed to the article.

Awards

NEW ZEALAND WINE OF THE YEAR

Winners

The New Zealand Wine of the Year is the official wine competition of the New Zealand wine industry. The purpose is to celebrate excellence in the production of premium New Zealand wines.

New Zealand Wine of the Year™ Champion 2019

Villa Maria Cellar Selection
Syrah, Hawke's Bay 2018

Champion Single Vineyard White Wine 2019

Mud House Single Vineyard
The Mound Vineyard Riesling,
Waipara Valley 2018

Champion Single Vineyard Red Wine 2019 Sponsored by Hillebrand New Zealand

Thornbury Pinot Noir,
Central Otago 2018

Champion Organic Red Wine 2019

Peregrine Pinot Noir,
Central Otago 2017

Champion Organic White Wine 2019

Peregrine Riesling,
Central Otago 2018

Champion Open Red Wine 2019 Sponsored by QuayConnect

Saddleback Pinot Noir,
Central Otago 2018

Champion Open White Wine 2019 Sponsored by Label and Litho Limited

Seifried Sauvignon Blanc,
Nelson 2019

Champion Wine of Provenance

2019 Villa Maria Reserve
Gimblett Gravels Syrah,
Hawke's Bay 2006/2013/2018

NEW ZEALAND

Cellar Door of the Year 2019 Award



The inaugural NZ Cellar Door of the Year Award was developed to recognise the outstanding visitor experiences that our wineries' cellar doors offer both international and domestic visitors.

WINNER

Church Road, Hawke's Bay

FINALISTS

Tantalus Estate, Waiheke Island
Craggy Range, Hawke's Bay
Chard Farm, Central Otago
Kinross, Central Otago
Cloudy Bay, Marlborough

HIGHLY COMMENDED

Bladen Wines, Marlborough
Brancott Estate, Marlborough
Forrest Wines, Marlborough
Misha's Vineyard, Central Otago

Online

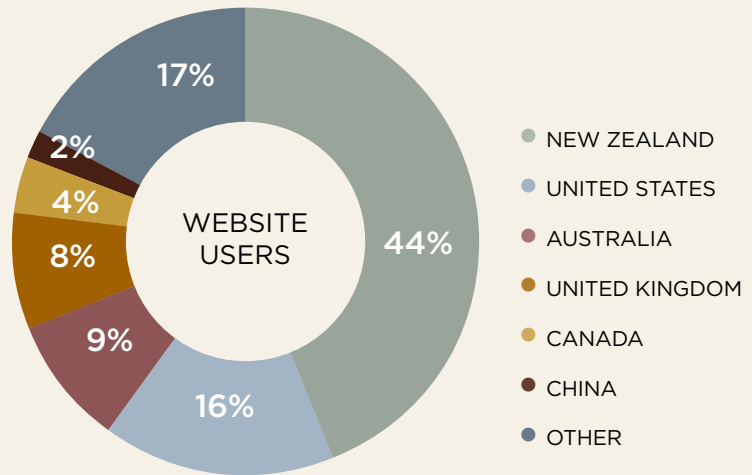
nzwine.com

WEBSITE USERS

263,963

PAGEVIEWS

1,019,158



Social Media



Our social media goal was to grow our community of highly engaged New Zealand wine lovers, engage with members, and equip members with the tools to leverage social media campaigns.

ANNUAL STATS:

PROFILE IMPRESSIONS

4.66m

PROFILE ENGAGEMENTS:

118,719



VISIT BAY OF ISLANDS NORTHLAND, ALISTAIR GUTHRIE

PROFILE ENGAGEMENT INCREASED YOY BY

103%

CURRENT NUMBER OF MENTIONS ON #NZWINE:

146,036

FASTEST GROWING PLATFORM WAS LINKEDIN

653%

growth

2032

new followers

Social Media Campaigns

**PINOT
NOIR
DAY**

Pinot Noir Day
#lovenzpinot
Aug 2019

Goal: Increase demand for NZ Pinot Noir through consumer education campaign.

168
members posted

12.7k
engagements and

270
times on #lovenzpinot

311.7k
impressions on
our channels

200 YEARS
NEW ZEALAND WINE

200 Years Campaign
#nzwine200
Aug-Sep 2019

Goal: Share interesting stories of the people who created the NZ wine industry.

received
29
member stories
and shared them as
website articles or
social media posts

The articles on website
were viewed
3000 times

5813
engagements on
social media



#Cellarbration
NZ Consumer Campaign
Oct 2019

Goal: Direct consumers to find their closest cellar door on nzwine.com/visit through advertising.

6,294
total website views

211k
impressions on ads

1,409
monthly average

685
times toolkit downloaded



NZ Rosé Day
#nzroseday
5 February 2020

Goal: Direct consumers to find their closest cellar door on nzwine.com/visit through advertising.

160
members and
influencers posted
about the day

105,743
people reached
during the campaign
on NZW channels, and

1,231
people responded to
our Facebook event

**#sauvblanc
day**
#SauvBlancDay
International
Consumer Campaign
April/May 2020

Goal: Promote NZ Sauvignon Blanc and NZ wine category internationally.

2.16
million impressions

49.2%↑
on 2019

874k
engagements

261.8%↑
on 2019

9504
public mentions
on #sauvblancday

885
downloads of the
toolkit created for
members

Financials 29

Statistics 32



NZW 200 YEARS CELEBRATION

Financials

High-level breakdown (Year to 30 June 2020)

New Zealand Winegrowers Inc is the industry organisation of and for the wine makers and grape growers of New Zealand.

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

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

User Pays activities includes marketing events in New Zealand and overseas, the Sustainable Winegrowing New Zealand programme, provision for the Wine Export Certification Service, Romeo Bragato Conference and Young Viticulturist and Young Winemaker Competitions.

The Bragato Research Institute is providing world-leading science, research and innovation to benefit New Zealand's entire grape and wine industry. The research winery was completed and opened on 27 February 2020.

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

The financial information presented has been extracted from the audited financial statements of New Zealand Winegrowers Incorporated for the year ended 30 June 2020.

OPERATING INCOME

\$27.0m
↑18%

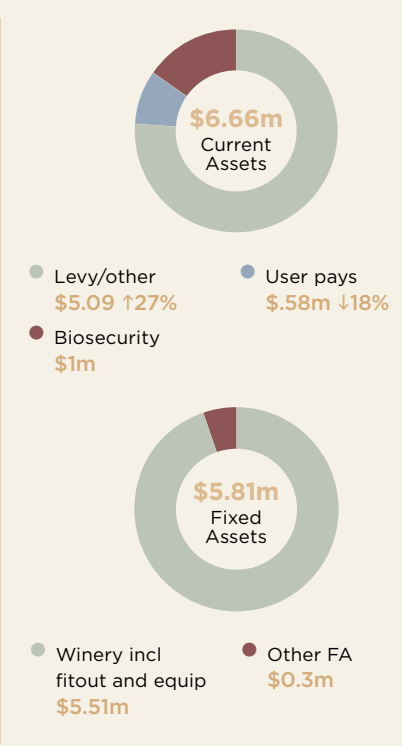
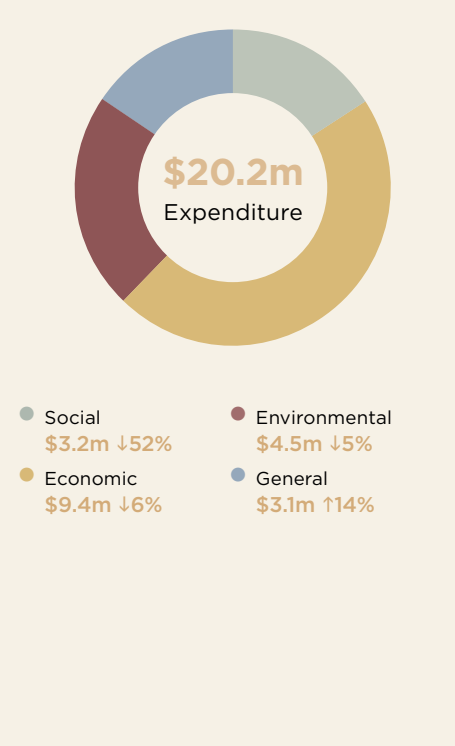
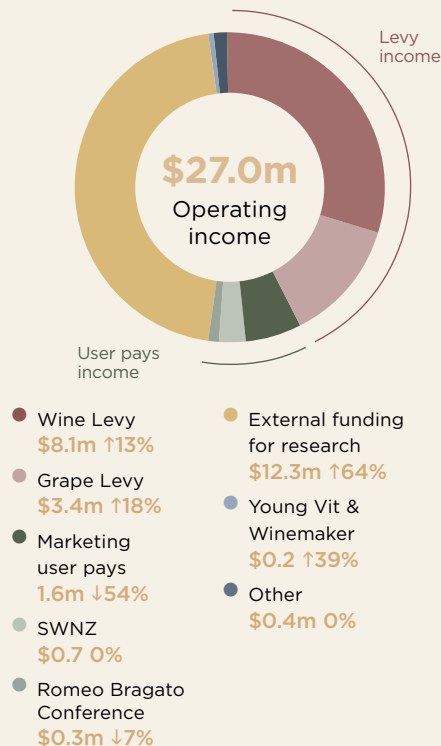
EXPENDITURE

\$20.2m
↓16%

ASSETS/RESERVES












\$12.5m

OPERATING INCOME AND RESERVES SUMMARIES



Financials

Breakdown of expenditure by objective

Key Achievements		Levy	Non Levy
Research and innovation Research winery opened	\$2.08m ↓7%		\$5.75m ↓13%
International Marketing and Tourism Cellar Door of the Year 262 Wineries offer tourism experiences	\$2.34m ↓25%		\$0.72m ↓42%
Administration Strategic review implementation completed	\$1.87m ↓8%		\$0.40m ↑36%
Events in New Zealand New Zealand Wine of the Year	\$0.10m ↑11%		\$0.93m ↓62%
Environment Sustainable Winegrowing Programme Spray Days	\$0.67m ↑65%		\$0.86m ↓6%
Member Information Romeo Bragato Conference 800 attended Grape Days	\$1.09m ↑4%		\$0.33m ↓27%
Regions Regional Membership Council Regional Funding and Support	\$1.08m ↑1%		
International Trade (Advocacy) EU/NZ FTA Negotiations Vice-presidency of FIVS	\$0.34m ↓9%		\$0.18m ↓34%
Domestic Trade (Advocacy) COVID-19 support to members 14 Domestic submissions to Government	\$0.74m ↓19%		
People 200 Year Anniversary Women in Wine Labour Strategy and RSE Young Vit & Winemaker Competitions	\$0.27m ↑109%		\$0.19m ↑67%
Biosecurity Building industry capability 3 Submissions to Government	\$0.28m ↓10%		
Total	\$10.86m ↓7%		\$9.36m ↓24%
Total Expenditure			\$20.22m ↓16%

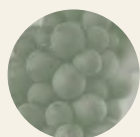


Statistics

Summary of New Zealand Wine (2011-2020)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Number of wineries	697	703	698	699	673	675	677	697	716	717
Number of growers	853	824	835	858	762	747	726	699	692	694
Producing area (hectares)	34,500	35,337	35,182	35,510	35,463	36,226	36,943	38,073	39,061	39,935
Average yield (tonnes per hectare)	9.5	7.6	9.8	12.6	9.1	12.0	10.7	11.0	10.7	11.4
Average grape price (NZ\$ per tonne)	1,239	1,359	1,688	1,666	1,732	1,807	1,752	1,841	1,890	N/A
Tonnes crushed (thousands of tonnes)	328	269	345	445	326	436	396	419	413	457
Total production (millions of litres)	235.0	194.0	248.4	320.4	234.7	313.9	285.1	301.7	297.4	329.0
Domestic sales of NZ wine (millions of litres)	66.3	64.6	51.7	49.9	61.9	56.2	52.1	53.6	50.6	50.0
Consumption per capita NZ wine (litres)	15.2	14.7	11.6	11.2	13.7	12.2	11.0	10.9	10.3	10.0
Total domestic sales of all wine (millions of litres)	93.9	91.9	92.5	90.6	96.0	93.4	92.0	94.5	93.1	91.7
Consumption per capita all wines (litres)	21.3	20.9	20.8	20.3	21.2	20.2	19.5	19.2	18.9	18.3
Export volume (millions of litres)	154.7	178.9	169.6	186.9	209.4	213.4	253.0	255.0	270.4	286.5
Export value (millions of NZ\$ FOB)	1,094	1,177	1,210	1,328	1,424	1,570	1,663	1,705	1,825	1,923

N/A - Not yet available



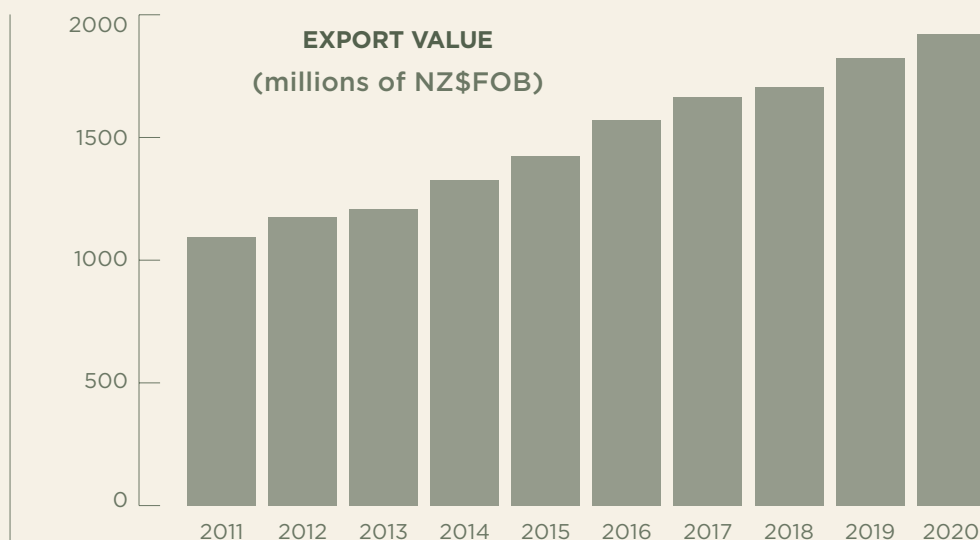
PRODUCING AREA
(hectares)

2011

34,500

2020

39,935



New Zealand Winegrowers Membership (2011-2020)

Wineries by size ¹	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Small	615	622	617	611	587	581	582	603	624	628
Medium	72	71	71	65	69	78	77	77	73	69
Large	10	10	10	23	17	16	18	17	19	20
Total	697	703	698	699	673	675	677	697	716	717

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

Wineries by region	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Northland	15	16	13	15	14	15	16	17	20	20
Auckland	117	118	116	114	111	110	109	102	102	99
Waikato/Bay of Plenty	17	15	13	13	12	9	8	10	7	9
Gisborne	24	24	21	19	18	18	18	17	16	15
Hawke's Bay	91	84	77	76	75	76	79	91	98	100
Wairarapa	64	64	65	67	67	68	64	69	72	67
Marlborough	142	148	152	151	140	141	139	141	150	158
Nelson	38	36	38	37	35	36	36	38	42	38
North Canterbury	66	68	70	66	67	64	65	67	68	71
Central Otago	115	120	124	132	127	133	137	136	135	133
Waitaki Valley								4	4	4
Other Areas	9	10	9	9	7	5	6	5	4	3
Total	698	703	698	699	673	675	677	697	716	717

Grape growers by region	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Northland										4
Auckland	17	9	11	11	10	5	4	3	8	5
Waikato/Bay of Plenty	2	2	2	0	0	0	0	0	0	0
Gisborne	57	54	53	48	41	41	36	33	31	27
Hawke's Bay	122	103	104	102	74	71	65	62	58	57
Wairarapa	24	24	30	17	14	15	17	13	14	14
Marlborough	544	551	548	581	535	534	519	510	509	514
Nelson	39	38	40	52	38	36	37	35	27	27
North Canterbury	0	0	0	0	0	0	0	9	13	10
Otago	35	35	33	32	32	31				
Central Otago							33	33	32	36
Waitaki Valley							1	1	0	0
Total	840	816	821	843	744	733	712	699	692	694

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

Statistics

New Zealand Producing Vineyard Area (2011-2020)

By grape variety (ha)	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020*
Sauvignon Blanc	16,758	20,270	20,015	20,029	20,497	21,400	22,230	23,426	24,605	25,160
Pinot Noir	4,803	5,388	5,488	5,509	5,514	5,519	5,572	5,588	5,549	5,642
Chardonnay	3,823	3,229	3,202	3,346	3,117	3,116	3,114	3,106	3,179	3,222
Pinot Gris	1,725	2,485	2,403	2,451	2,422	2,439	2,369	2,471	2,413	2,593
Merlot	1,386	1,234	1,255	1,290	1,239	1,198	1,211	1,133	1,093	1,087
Riesling	993	770	787	784	767	753	721	679	572	569
Syrah	299	387	408	433	436	426	439	432	440	437
Cabernet Sauvignon	519	305	301	289	275	253	249	250	216	219
Gewürztraminer	313	347	334	376	277	242	229	221	206	217
Malbec	157	140	142	127	129	119	121	114	111	115
Sauvignon Gris**					104	113	109	105	105	105
Cabernet Franc	161	119	119	113	109	99	91	97	91	93
Viognier**					129	119	97	97	89	85
Other varieties	2,723	661	728	764	448	430	391	354	394	395
Total	33,660	35,335	35,182	35,511	35,463	36,226	36,943	38,073	39,061	39,935

By region (ha)	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020*
Northland									73	71
Auckland									313	319
Auckland/Northland	556	411	414	392	403	387	387	392		
Waikato/Bay of Plenty	147	24	24	25	16	3	13	15	12	12
Gisborne	2,072	1,635	1,599	1,915	1,440	1,350	1,246	1,181	1,163	1,191
Hawke's Bay	4,993	5,030	4,846	4,774	4,638	4,641	4,615	4,678	4,883	5,034
Wairarapa	882	979	991	995	1,003	1,005	932	969	1,030	1,039
Marlborough	19,024	22,956	22,819	22,907	23,452	24,365	25,244	26,288	27,176	27,808
Nelson	861	1,011	1,095	1,123	1,141	1,135	1,093	1,162	1,105	1,102
North Canterbury	1,809	1,371	1,435	1,488	1,428	1,419	1,472	1,457	1,368	1,369
Central Otago	1,540	1,917	1,959	1,932	1,942	1,880	1,886	1,873	1,875	1,930
Waitaki Valley						41	55	58	63	59
Other & Unknown	1,516									
Total	33,400	35,334	35,182	35,551	35,463	36,226	36,943	38,073	39,061	39,935

* Projections submitted in the 2019-22 Vineyard Register

** Reported separately since 2015

*** Auckland and Northland reported separately since 2019

Central Otago and Waitaki Valley reported separately from 2016

Since the collection of data for the 2019 – 2022 vineyard register reports the North Canterbury geographical indication boundaries have been accepted which encompasses the areas previously known as Canterbury, Waipara Valley and North Canterbury in this report

Source: New Zealand Winegrowers Vineyard Survey/Vineyard Register Reports

New Zealand Vintages (2011-2020)

By Grape Variety (tonnes)	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Sauvignon Blanc	224,412	181,121	228,781	310,240	216,078	303,711	285,862	296,573	302,157	326,058
Pinot Noir	31,156	23,285	31,775	36,499	25,763	35,661	28,760	35,095	26,944	34,105
Pinot Gris	17,787	15,347	22,042	23,880	19,707	24,892	20,755	22,824	20,953	28,849
Chardonnay	25,580	22,855	27,184	28,985	27,015	29,162	26,843	26,371	25,729	27,568
Merlot	9,092	8,046	10,076	10,756	9,397	9,321	7,714	10,623	9,240	11,166
Riesling	6,118	4,989	5,932	6,013	4,535	5,937	3,880	3,776	4,776	4,510
Syrah	1,741	1,431	2,240	2,178	1,497	1,756	1,733	2,126	2,230	2,392
Cabernet Sauvignon	1,667	1,120	1,465	1,742	1,376	1,537	974	1,169	1,076	1,210
Gewürztraminer	1,836	1,249	1,788	2,264	1,761	2,221	1,047	976	834	1,167
Sauvignon Gris						1,182	944	1,080	1,002	880
Malbec	764	694	825	1,135	586	483	697	782	741	793
Other Reds	556	307	262	537	457	677	401	456	506	522
Cabernet Franc	488	414	421	582	485	616	373	350	473	452
Grüner Veltliner				341	228	276	253	329	347	369
Semillon	689	596	721	507	425	466	249	385	304	292
Alberino								162	269	284
Other Whites	898	618	1,052	1,646	1,294	727	824	250	232	271
Viognier	781	839	519	1,148	720	771	266	444	318	235
Muscat Varieties	550	578	634	455	301	329	450	323	200	234
Arneis		163	220	336	268	257	239	152	91	162
Pinotage	476	292	400	425	494	374	145	153	142	122
Survey total	324,115	263,652	335,937	429,244	311,93	419,982	382,264	404,246	398,422	441,640
Industry total*	328,000	269,000	345,000	445,000	326,000	436,000	396,000	419,000	413,000	457,000

By Region (tonnes)	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Northland	111	92	130	210	203	92	121	113	319	269
Auckland	1,464	1,220	789	1,392	824	1,267	934	787	1,585	1,249
Waikato/Bay of Plenty	51	7	12	63	ND	18	ND	ND	ND	ND
Gisborne	14,450	15,590	15,567	16,192	17,280	15,944	16,337	13,000	16,238	18,959
Hawke's Bay	35,533	32,793	38,829	44,502	36,057	42,958	33,679	41,061	37,173	43,247
Wairarapa	3,598	4,271	4,798	5,743	3,559	5,049	3,822	4,592	4,390	4,472
Marlborough	244,893	188,648	251,630	329,571	233,182	323,290	302,396	313,038	305,467	343,036
Nelson	7,854	6,129	7,777	10,494	6,777	10,028	8,540	9,120	12,370	11,572
North Canterbury	9,485	7,079	8,348	10,962	5,395	12,170	8,240	11,157	8,534	9,861
Central Otago	7,104	8,115	8,407	10,540	8,951	9,177	8,324	11,358	11,868	8,515
Waitaki Valley								170	41	114
Other	48		50		159	363	16	3	579	347
Survey total	324,591	263,944	336,337	429,669	312,387	420,356	382,409	404,399	398,564	441,640
Industry total*	328,000	269,000	345,000	445,000	326,000	436,000	396,000	419,000	413,000	457,000

* 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

Statistics

New Zealand Wine Exports by Market (2011-2020)

		2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
USA	L	32.223	39.481	43.362	48.914	53.858	61.636	72.929	72.701	76.234	82.598
	NZ\$	231.922	251.329	283.651	328.049	372.241	460.600	517.258	521.738	557.000	622.150
United Kingdom	L	52.930	57.657	47.622	51.868	59.745	58.936	74.638	74.435	82.728	82.448
	NZ\$	293.631	284.021	278.415	318.611	353.931	381.809	389.272	386.740	446.584	464.092
Australia	L	45.263	53.474	49.764	53.709	57.528	52.960	59.672	56.059	56.335	61.852
	NZ\$	337.740	380.473	373.048	380.851	362.188	361.677	371.099	366.997	367.722	365.083
Canada	L	5.705	6.509	7.272	7.703	9.583	10.612	11.388	12.776	12.412	12.278
	NZ\$	59.180	70.906	78.177	78.941	94.906	107.372	107.434	127.933	130.133	135.961
Germany	L	0.748	1.429	1.532	2.682	2.073	2.667	1.728	1.685	8.413	14.021
	NZ\$	5.302	7.639	9.532	14.459	10.018	14.501	10.740	9.061	44.917	66.384
Ireland	L	1.844	2.158	2.052	2.212	2.512	2.888	2.986	3.448	3.020	3.243
	NZ\$	15.643	16.326	14.420	16.353	17.472	21.309	21.658	27.183	25.874	27,011
China	L	1.489	2.200	2.219	1.810	1.858	2.028	2.270	2.520	2.525	2.002
	NZ\$	16.872	25.234	26.868	24.803	27.069	27.593	31.758	37.385	39.177	26.698
Netherlands	L	4.060	4.586	4.128	5.022	6.744	6.801	8.203	9.322	4.767	3.707
	NZ\$	27.369	26.744	26.743	33.383	41.479	44.480	45.439	50.853	28.655	26.149
Singapore	L	1.164	1.149	1.285	1.572	1.580	1.567	1.306	1.338	1.314	1.148
	NZ\$	13.984	14.515	16.148	21.326	20.691	20.570	18.596	19.165	18.884	16.526
Sweden	L	1.367	1.459	1.563	1.562	1.630	1.843	1.779	1.521	1.631	1.801
	NZ\$	11.365	11.554	13.090	13.020	13.163	15.276	14.208	12.903	13.250	15.173
Japan	L	0.897	1.119	1.152	1.196	1.193	1.150	1.273	1.225	1.342	1.272
	NZ\$	11.017	12.891	13.646	13.908	13.773	13.796	14.565	14.047	15.003	14.873
Hong Kong	L	1.307	1.524	1.570	1.348	1.399	1.283	1.353	1.178	1.067	1.070
	NZ\$	17.629	18.393	20.474	16.853	17.680	17.333	18.553	15.671	13.337	14.112
Denmark	L	0.976	1.004	0.790	0.864	1.191	0.942	1.252	1.322	1.362	1.381
	NZ\$	6.646	6.566	5.388	6.652	8.042	7.182	8.368	8.594	8.897	8.719
Norway	L	0.169	0.205	0.224	0.334	0.270	0.284	0.320	0.316	0.550	0.605
	NZ\$	1.529	1.483	1.591	2.742	2.045	2.511	2.508	2.648	3.569	3.946
Finland	L	0.276	0.219	0.185	0.259	0.310	0.258	0.248	0.261	0.314	0.295
	NZ\$	2.532	2.134	1.572	2.283	2.455	2.388	2.004	2.340	2.809	2.477
Others	L	4.243	4.706	4.942	5.834	7.947	7.516	11.618	14.979	16.351	16.740
	NZ\$	41.614	46.638	47.758	56.124	67.307	70.938	89.507	101.377	109.304	113.339
Total	L	154.661	178.880	169.669	186.889	209.419	213.371	252.962	255.093	270.364	286.461
	NZ\$	1,093.973	1,176.847	1,210.525	1,328.358	1,424.461	1,569.515	1,662.968	1,704.644	1,825.116	1,922,694

Note: All figures are in millions

Source: Statistics New Zealand

New Zealand Wine Exports by Market (year end June 2020)

		White 750ml	White Other	White Total	Red 750ml	Red Other	Red Total	Sparkling	Fortified	Total
USA	L	53.415	26.605	80.020	2.199	.198	2.397	.181	.000	82.598
	NZ\$	471.648	118.512	590.159	29.768	.863	30.631	1.358	.002	622.150
	\$/L	\$8.83	\$4.45	\$7.38	\$13.54	\$4.36	\$12.78	\$7.50	\$275.17	\$7.53
United Kingdom	L	36.218	43.980	80.198	1.850	.235	2.085	.165	.000	82.448
	NZ\$	271.596	168.093	439.689	21.584	1.258	22.842	1.560	.000	464.092
	\$/L	\$7.50	\$3.82	\$5.48	\$11.67	\$5.35	\$10.96	\$9.44	\$56.00	\$5.63
Australia	L	28.077	29.315	57.392	3.698	.380	4.079	.358	.023	61.852
	NZ\$	197.028	113.883	310.911	45.37	3.689	49.058	4.902	.212	365.083
	\$/L	\$7.02	\$3.88	\$5.42	\$12.27	\$9.70	\$12.03	\$13.70	\$9.06	\$5.90
Canada	L	10.865	.200	11.065	1.178		1.178	.035		12.278
	NZ\$	119.298	.730	120.027	15.596		15.596	.338		135.961
	\$/L	\$10.98	\$3.65	\$10.85	\$13.23		\$13.23	\$9.55		\$11.07
Germany	L	2.893	10.509	13.403	.299	.312	.611	.007		14.021
	NZ\$	19.75	41.806	61.556	2.954	1.783	4.737	.091		66.384
	\$/L	\$6.83	\$3.98	\$4.59	\$9.87	\$5.71	\$7.75	\$12.23		\$4.73
Ireland	L	2.425	.724	3.150	.065	.007	.072	.021		3.243
	NZ\$	19.15	6.704	25.854	.796	.085	.881	.276		27.011
	\$/L	\$7.90	\$9.26	\$8.21	\$12.22	\$11.91	\$12.19	\$13.11		\$8.33
China	L	1.240	.037	1.277	.646	.072	.718	.007		2.002
	NZ\$	14.390	.385	14.775	11.039	.803	11.842	.081		26.698
	\$/L	\$11.61	\$10.47	\$11.57	\$17.08	\$11.21	\$16.49	\$11.58		\$13.34
Netherlands	L	2.557	.743	3.30	.335	.001	.336	.071		3.707
	NZ\$	20.083	2.494	22.577	2.855	.010	2.865	.707		26.149
	\$/L	\$7.85	\$3.36	\$6.84	\$8.52	\$8.81	\$8.53	\$9.92		\$7.05
Singapore	L	.862	.002	.864	.260	.003	.263	.021	.000	1.148
	NZ\$	11.618	.013	11.632	4.457	.042	4.499	.394	.000	16.526
	\$/L	\$13.48	\$8.10	\$13.47	\$17.17	\$13.64	\$17.13	\$18.42	\$77.50	\$14.40
Sweden	L	1.172	.287	1.459	.280	.001	.280	.061		1.801
	NZ\$	10.018	1.323	11.341	3.218	.008	3.226	.607		15.173
	\$/L	\$8.55	\$4.60	\$7.77	\$11.50	\$11.79	\$11.50	\$9.92		\$8.43
Japan	L	.793	.115	.908	.319	.00	.319	.044		1.272
	NZ\$	8.363	.535	8.899	5.486	.005	5.491	.484		14.873
	\$/L	\$10.54	\$4.64	\$8.80	\$17.19	\$20.47	\$17.20	\$10.91		\$11.69
Hong Kong	L	.891	.001	.892	.166	.001	.166	.012	.000	1.070
	NZ\$	10.295	.013	10.309	3.469	.078	3.547	.256	.001	14.112
	\$/L	\$11.55	\$18.91	\$11.56	\$20.95	\$121.88	\$21.33	\$21.79	\$12.22	\$13.19
Denmark	L	.614	.639	1.252	.124	.00	.124	.005		1.381
	NZ\$	4.64	2.589	7.228	1.427	.001	1.427	.063		8.719
	\$/L	\$7.56	\$4.05	\$5.77	\$11.54	\$28.72	\$11.54	\$12.93		\$6.31
Norway	L	.264	.287	.551	.052		.052	.002		.605
	NZ\$	2.086	1.199	3.285	.64		.64	.021		3.946
	\$/L	\$7.90	\$4.18	\$5.96	\$12.32		\$12.32	\$12.93		\$6.53
Finland	L	.134	.060	.194	.031		.031	.071		.295
	NZ\$	1.242	.174	1.417	.404		.404	.657		2.477
	\$/L	\$9.30	\$2.90	\$7.31	\$13.07		\$13.07	\$9.28		\$8.38
Others	L	7.133	8.436	15.57	1.044	.042	1.086	.084	.000	16.740
	NZ\$	66.376	32.801	99.177	12.628	.299	12.927	1.228	.007	113.339
	\$/L	\$9.30	\$3.89	\$6.37	\$12.10	\$7.18	\$11.91	\$14.65	\$14.98	\$6.77
Total	L	149.553	121.94	271.493	12.546	1.251	13.797	1.146	.024	286.461
	NZ\$	1247.581	491.254	1738.835	161.691	8.923	170.613	13.023	.222	1922.694
	\$/L	\$8.34	\$4.03	\$6.40	\$12.89	\$7.13	\$12.37	\$11.36	\$9.28	\$6.71

Note: All litre and dollar figures are in millions

Source: Statistics New Zealand

Statistics

New Zealand Wine Exports by Variety (2011-2020)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Sauvignon Blanc	131.653	150.883	144.551	160.580	177.776	181.944	217.890	220.065	231.194	249.445
Pinot Noir	9.498	10.560	10.170	10.705	10.886	12.171	12.510	13.171	12.331	10.282
Pinot Gris	2.648	4.091	3.612	4.688	4.479	4.713	7.151	7.740	8.678	9.207
Rosé	0.622	0.586	0.490	0.712	0.835	0.942	2.389	3.656	5.195	5.592
Chardonnay	4.888	5.510	4.914	4.627	5.277	6.063	6.172	4.766	5.088	4.649
Merlot	2.347	2.379	2.059	1.765	1.711	1.906	2.250	2.060	2.769	1.456
Sparkling	1.271	1.392	1.451	1.700	1.441	1.412	1.088	1.167	1.150	1.366
Riesling	1.062	1.057	0.924	0.996	0.113	0.150	1.099	0.962	1.047	1.184
Cabernet or Merlot Blend	1.094	1.254	1.424	1.030	0.754	0.836	0.972	0.798	0.810	0.436
Syrah	0.307	0.309	0.270	0.242	0.954	1.065	0.283	0.375	0.346	0.273
Other White Varietals	0.076	0.118	0.103	0.127	0.282	0.341	0.453	0.420	0.235	0.254
Gewürztraminer	0.306	0.202	0.192	0.212	0.017	0.026	0.182	0.150	0.148	0.135
Generic White	0.532	0.719	0.266	0.043	0.384	0.380	0.085	0.120	0.126	0.077
Sparkling Sauvignon	0.000	0.217	0.360	0.107	0.175	0.183	0.059	0.101	0.042	0.056
Other Red Varietals	0.087	0.095	0.085	0.068	0.041	0.048	0.128	0.064	0.085	0.047
Generic Red	0.022	0.021	0.043	0.002	0.170	0.087	0.126	0.013	0.008	0.042
Sweet Wines	0.039	0.055	0.038	0.037	0.085	0.134	0.051	0.032	0.024	0.021
Cabernet Sauvignon	0.020	0.030	0.046	0.006	0.012	0.013	0.011	0.023	0.011	0.019
Chenin Blanc	0.017	0.013	0.016	0.017	0.041	0.028	0.008	0.009	0.011	0.010
Chardonnay Blend	0.415	0.149	0.997	0.047	0.005	0.132	0.007	0.008	0.010	0.013
Sauvignon Blend	0.077	0.140	0.422	0.034	0.014	0.013	0.135	0.102	0.018	0.009
Fortified	0.001	0.001	0.001	0.004	0.002	0.011	0.001	N/A	0.002	N/A
Semillon	0.008	0.002	0.003	0.008	0.009	N/A	0.051	N/A	N/A	N/A
Total*	156.990	179.783	172.437	187.757	205.460	212.594	253.099	255.802	269.329	284.574

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

Note: All figures are in millions of litres

Source: Wine Export Certification Service

Wine Imports into New Zealand (2011-2020)

By country of origin	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Australia	22.512	21.897	32.565	31.658	25.668	28.715	28.961	31.517	32.118	29.975
France	1.095	1.449	2.023	2.153	2.344	2.869	2.807	2.762	3.069	2.807
Italy	0.995	0.858	0.865	0.94	1.023	1.308	1.381	1.786	1.870	2.362
Argentina	0.051	0.082	0.112	0.161	0.229	0.212	0.223	0.265	0.917	2.084
Chile	0.062	0.530	1.936	2.456	1.905	1.842	2.397	1.606	1.522	1.943
Spain	0.230	0.311	0.430	0.518	0.641	0.578	0.716	0.557	0.654	0.955
South Africa	1.710	1.694	2.579	1.732	1.373	1.086	1.492	1.370	1.405	0.615
Others	0.631	0.511	0.382	1.106	1.307	0.603	1.958	1.017	0.911	1.057
Total	27.287	27.331	40.892	40.724	34.490	37.212	39.935	40.881	42.466	41.618

By product type	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
White	8.005	7.555	16.76	17.28	11.217	14.088	18.206	21.525	21.237	20.603
Red	16.012	17.011	20.958	20.541	19.830	19.070	17.579	15.036	16.281	16.267
Sparkling	2.760	2.008	2.962	1.849	2.268	2.632	2.651	2.905	3.317	3.415
Champagne	0.447	0.679	0.883	0.896	1.049	1.315	1.397	1.371	1.567	1.288
Fortified	0.063	0.078	0.0211	0.158	0.126	0.058	0.076	0.044	0.640	0.045
Total	27.287	27.331	40.892	40.724	34.490	37.212	39.909	40.881	42.466	41.618

Note: All figures are in millions of litres

Country of Origin		White	Red	Sparkling	Champagne	Fortified	Total
Australia	\$	32.884	63.458	9.857		0.927	107.126
	L	16.222	11.665	1.888		.020	29.795
France	\$	4.260	13.523	0.628	39.941	0.067	58.419
	L	.393	1.041	.084	1.288	.000	2.807
Italy	\$	1.272	6.352	9.059		0.079	16.761
	L	.258	.920	1.182		.002	2.362
Spain	\$	0.651	2.840	0.692		0.210	4.393
	L	.396	.456	.100		.003	.955
Chile	\$	1.286	2.263	0.003		0.001	3.554
	L	.808	1.135	.000		.000	1.943
Argentina	\$	1.690	1.815				3.505
	L	1.791	.293				2.084
South Africa	\$	0.696	1.250	0.092		0.064	2.103
	L	.278	.325	.011		.002	.615
Others	\$	3.281	2.919	1.165		1.466	8.832
	L	.457	.432	.150		.018	1.057
Total	\$	46.021	94.419	21.496	39.941	2.815	204.693
	L	20.603	16.267	3.415	1.288	.045	41.618

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

Directory

BOARD MEMBERS

New Zealand Winegrowers (NZW)

John Clarke, QSO, JP

Ilfracombe Trust (*Chair*)

Clive Jones

Nautilus Estate (*Deputy Chair*)

Dominic Pecchenino

Buena Vista Vineyards

Duncan McFarlane

Indevin Group Ltd

Fabian Yukich

Villa Maria Estate Ltd

James Dicey

Ceres Wines Ltd

John Ballingall

Sense Partners

Patrick Materman

Pernod Ricard Winemakers NZ

Peter Holley

Mission Estate Winery

Rachel Taulelei

Kono NZ

Simon Towns

Constellation Brands

Tim Nowell-Usticke

Wineworks

ROLL OF FELLOWS

New Zealand Winegrowers

2006 **Ross Spence**, QSO

2006 **Reid Fletcher**

2008 **Tim Finn**

2008 **John Webber**

2012 **Robin Dicey**

2013 **Stuart Smith**

2013 **Sir George Fistonich**

2014 **Hermann Seifried**

2014 **Agnes Seifried**

2014 **Richard Riddiford**

2015 **Kate Radburn**

2015 **Mike Trought**

2015 **Alan Brady**

2016 **Larry McKenna**

2017 **Joe Babich**

2017 **Geoff Thorpe**

2017 **Bill Spence**

2017 **Lorraine Rudelj**

2018 **Jane Hunter**, CNZM

2018 **Ivan Sutherland**, MNZM

2018 **Mark Nobilo**

2019 **Bob Campbell**

2019 **Steve Green**

2019 **Annie Millton**

2019 **James Millton**, MNZM

Wine Institute of New Zealand

1982 **George T Mazuran**, OBE, JP

Bogoslav (Bob) Sokolich

Alexander A Corban,

OBE, BSc, RD Oen

Thomas B McDonald, OBE, JP

1987 **Mate G Brajkovich**, OBE

1988 **Peter D Fredatovich**, MBE, JP

1990 **Mate I Selak**

1991 **Joseph A Corban**, MBE

1992 **Frank I Yukich**

1993 **John (Jock) C Graham**, MNZM

1994 **Robert O Knappstein**, RD Oen

1995 **Peter J Babich**, MBE

1996 **Terence J Dunleavy**, MBE, JP

1997 **Donald M Maisey**

1998 **Anthony F Soljan**

1999 **John Buck**, OBE

2003 **Kerry Hitchcock**

ROLL OF HONOURARY LIFE MEMBERS

New Zealand Winegrowers

2005 **Ms Margare Harvey**, MW

ROLL OF HONOURARY LIFE MEMBERS

Wine Institute of New Zealand

1997 **Bryan Mogridge**, ONZM, BSc

1998 **James S Fraser**,
B.Food Tech, Dip.Dy

1999 **Stanley L Harris**, QSM

ROLL OF LIFE MEMBERS

New Zealand Grape Growers Council

1995 **Ross Goodin**, ONZM, QM

2000 **Kevyn Moore**, QSM

2004 **Jim Hamilton**

2005 **Willie Crosse**

INDUSTRY ORGANISATIONS

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