NEW ZEALAND WINEGROWERS INC

Annual Report 2022

NEW ZEALAND WINE
PURE DISCOVERY

PHOTO: RICHARD BRIGGS

Vision

Around the world, New Zealand is renowned for its 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, and environment.

The pattern designs for each of our six focus areas of sustainability are rooted in vineyard topography and the idea of small actions making a big impact – representing the relationship between nature and our people. From the top of this page flowing through to the bottom we have individual patterns representing climate change, plant protection, soil, water, people and waste.

2022

NEW ZEALAND WINEGROWERS INC

Annual Report

PALLISER ESTATE WINES, WAIRARAPA

Chair's Report

After two years of COVID chaos, New Zealand grape growers and wineries are looking to the future with renewed certainty and confidence.

An improved harvest, accessible markets, and consumers demanding more New Zealand wine than ever, are huge benefits for the sector. This positive environment provides the opportunity to push ahead, ensuring we are positioned well for the future.

Tempering this confidence are significant challenges. Inflation has returned to haunt producers and the market. Cost increases threaten industry profitability, bringing into question reinvestment critical to long-term growth. Labour availability continues to be a key challenge along with both domestic and international supply chain uncertainty.

In this environment, growers and wineries are focusing on the core fundamentals that drive the success of our sector—supplying our customers across the globe with highly distinctive, premium, sustainable wines that can only be sourced from the regions and subregions of Aotearoa New Zealand.

NEW ZEALAND WINE IN HIGH DEMAND

Markets continue to display a strong appetite for New Zealand wines. However, in the past year many wineries have been supply-constrained due to our dramatically smaller harvest in 2021. As a result, total New Zealand wine sales have fallen 13% in volume over the past 18 months, with sales in New Zealand down to the lowest level in nearly two decades. While export volume also fell, value increased as wineries lifted prices. Total export value reached $1.95 billion, with the average value of packaged exports increasing 6%.

Going into harvest 2022, our customers, alongside growers and wineries, were desperate for an improved vintage. Fortunately nature delivered, despite all the complications imposed by staff shortages and COVID-19. The harvest of 532,000 tonnes will enable severely depleted cellars and supply chains to be restocked. Strong export growth is forecast in the year ahead, driven by demand in North America. Domestically, sales are expected to rebound from their two-decade lows.

The improved supply situation will come as a relief to growers and wineries, and most importantly, our customers. They can be confident the empty shelves will be restocked with the high quality, premium and sustainable wines on which our global reputation is founded.

Producers, and consumers, will also start to benefit from the New Zealand government's successful conclusion of free trade agreements with the United Kingdom (UK) and European Union (EU). Under difficult circumstances, negotiators have concluded deals that bode well for the future of our wines in these markets, which already purchase more than $600 million of New Zealand wine each year.

REVIEWING OUR BRAND ESSENCE

Recent years have seen major evolution in global market dynamics. The rise of online sales, new packaging formats, consumer trends towards wellness and more, are shaking up global markets.

In this environment we have strongly supported the New Zealand Trade and Enterprise (NZTE) *Made with Care* campaign. This initiative has highlighted the value of the New Zealand wine brand in key markets; unsurprising given over 400 million bottles of premium New Zealand wine end up on dining room and restaurant tables around the world each year. Within the constraints of COVID-19 we continued to be active, utilising our offices based in-market to tell the New Zealand wine story, maintain key contacts, and report back on market developments.

With markets now reopened, it is important the overarching New Zealand wine brand story is clear, distinctive, and continues to resonate with the evolving expectations of our customers. Research is underway to define the 'brand essence' of New Zealand wine, with key insights informing our future marketing activities, and results will be shared with members in the year ahead.

A GREEN FUTURE: FIT FOR A BETTER WORLD

Our strong reputation and sales success continues to fuel growth in the sector. Over the last five years the producing vineyard area has expanded nearly 5,000 hectares and now totals close to 42,000 hectares. Driven by consumer demand, we expect continuing expansion of New Zealand's vineyard area over the next decade.

Future growth will be contingent on growers and wineries meeting increasingly strict environmental requirements. With widespread commitment to sustainability through Sustainable Winegrowing New Zealand (SWNZ) and various organic and biodynamic programmes, our sector is well placed to meet those demands. We outlined recent progress in our 2022 Sustainability Report, which details our goals and current performance in six focus areas—climate change, water, waste, plant protection, soil and people.

The Sustainability Report catalogues our sustainability journey for the information of our markets, consumers and regulators. We also co-hosted the Oceania section of the Green Wine Future 2022 International Conference, which featured a strong lineup of speakers from New Zealand, including the Minister for Trade and Export Growth, Hon Damien O'Connor.

The Bragato Research Institute (BRI), our wholly owned subsidiary, has a central role in generating research-led change in the way we grow grapes and make wine. To enable this, BRI has secured additional government funding and is adding more staff resource to build our research capability and capacity. In the past year we have seen the launch of the Sauvignon Blanc Grapevine Improvement Programme, which we are confident will deliver improved planting material, adapted to a climate-changed world, over the next decade and beyond.

Water issues are also a major focus. We are working closely with the Ministry for Primary Industries (MPI) and the Ministry for the Environment (MfE) to develop improved reporting systems for SWNZ—our goal: to use SWNZ to meet the information and reporting needs required for freshwater farm plans. Delivering on this ambition will reduce costs for winegrowers, and further enhance the industry's social licence to operate.

These developments all strongly align with the MPI-led vision and strategy, *Fit for a Better World*. We are proud of this; it demonstrates the benefits of the industry and government working together. ▸

NAUTILUS ESTATE, MARLBOROUGH. PHOTO: RICHARD BRIGGS

IMPACT OF INCREASING COSTS

The re-emergence of inflation, now at a 30-year high, is impacting the industry and our consumers. Cost increases are significant and wide-ranging—from labour to energy to packaging and freight. Ultimately these increases threaten profitability, and capital available to fund future growth.

Government-generated cost increases are a major concern for all growers and wineries. They are a focus in our submissions to Ministers and officials across the suite of reforms currently being proposed by the government.

Excise, a long-standing issue, is one of the principal expenses faced by wineries selling in the domestic market. In fact, excise costs per bottle are more than the price, on average, paid for grapes, our key raw material. On 1 July 2022 the government implemented a 6.9% increase in excise rates, the largest increase in three decades. This increase will likely be passed on to consumers, otherwise it could endanger the viability of some businesses. It is ironic that this will only add to inflationary pressure in the economy.

Excise is not the only government-generated cost challenge. The proposed Container Return Scheme is forecast to impose additional costs of at least 30 cents per container. We fully support the goal of improved recycling as waste minimisation is one of the focus areas of SWNZ. However, we seriously question whether the proposed system will deliver on this ambition for glass bottles. We are strongly advocating for other options to be explored, to ensure the desired environmental outcomes are actually achieved.

OUR PEOPLE

Our industry is built on the commitment and dedication of our people. New Zealand wineries and growers employ over 7,300 full-time staff, and another 14,600 are employed in businesses that support and service our sector. These roles are principally located in regional Aotearoa New Zealand, supporting local communities and economies from Northland to Central Otago.

With the border closed for much of the past year and unemployment at a historically low rate, securing a skilled and motivated workforce has been challenging. This year, for the first time ever as far as we are aware, there were wineries that were forced to close for periods during vintage. This unprecedented situation reflected the labour shortage exacerbated by rampant community COVID-19 spread.

To have our industry identified as an industry of choice by employees, we have worked closely with the MPI's *Opportunity Grows Here* team to attract more Kiwis into our workforce through targeted digital campaigns. We published a *Code of Conduct for Our People* to encourage best-in-class employment standards, and have continued a range of programmes such as Women in Wine, Young Winemaker of the Year and Young Viticulturist of the Year, all designed to foster career development. Reflecting the positive steps taken to support staff we were pleased to see industry members performing well in the MPI-led Primary Industries Good Employer Awards.

The roles of all the permanently employed Kiwis in our industry are dependent, at least to some extent, on the overseas workers who help us meet the seasonal peaks inherent in our industry, based as it is on the annual biological cycles and natural systems. We were fortunate to have support from the government for continued

Our determination to learn, adapt and always improve makes our industry a leader in many ways.

access to Recognised Seasonal Employer (RSE) workers in the past year, especially for pruning, our peak time for seasonal workers.

The labour outlook for the year ahead remains highly problematic. While the border is now open, there are no assurances that Working Holiday Visa holders will return to New Zealand in the same numbers as previously. Similarly, the prospective exodus of a large number of young Kiwis heading abroad on their OEs will likely further reduce the pool of available workers. Further, RSE numbers for the next year are still unknown. The outlook is for a highly constrained labour market, in a situation where there is no technology available to replace our seasonal workforce.

This prospect makes labour supply a key concern for growers and wineries. If not resolved, it will curtail future growth and export earnings for our sector, and so remains a major focus for the year ahead.

A highlight of our people activities is acknowledging service to our industry. We are pleased this year to add Chris Howell from Hawke's Bay, Dominic Pecchenino from Marlborough, Clive Paton and Phyll Pattie of Ata Rangi, and Jim and Rose Delegat of Delegat Limited to the roll of Fellows of New Zealand Winegrowers. Their service to the industry is a mark to which all members should aspire.

INFORMING BUSINESS DECISIONS

Members look to New Zealand Winegrowers (NZW) for information that will help inform their daily business decisions. The provision of timely information is a function performed across the suite of our activities—advocacy, research, sustainability and marketing.

Our determination to learn, adapt and always improve makes our industry a leader in many ways. The past year has continued to see strong levels of participation in events showcasing the latest trends and developments, such as Grape Days and Spray Days; in both cases more than 900 industry members attended. A highlight in the year ahead will be the BRI two-day technical conference, highlighting the findings of the recently concluded Vineyard Ecosystems Research Programme, and painting a picture of what's in store for our vineyard practices.

In-person events also help to build industry team spirit and collaboration, but COVID-19 restrictions have continued to curtail these. While attendance at webinars and open rates for electronic communications remain strong, it is clear there is a desire for the industry to connect in person. We hope that the easing of restrictions will enable this to happen in the year ahead.

WORKING TOGETHER—THE FUTURE

New Zealand wineries and growers have always worked together for the betterment of the whole industry. The commitment was reaffirmed this year with strong, positive votes for the grape and wine levies that fund NZW.

While members supported the levies, they did raise issues about the future of our sector and how that would impact their industry organisation. As a result, the Board has launched a review of industry representation, governance and levies.

Ensuring a robust outcome from the review is critical. The review will not be rushed as the issues being considered lie at the very heart of our organisational structure and activities. They are central to retaining ongoing support from our members. Any proposals flowing from the review will need to support, and be supported by, a broad base of members—growers, small, medium, and large wineries—each of whom have different needs and interests. Gaining that support will ensure we continue to play our role; helping to protect the reputation of New Zealand wine and supporting the sustainable growth of the industry over the next decade and beyond. ■

Clive Jones *(Chair)*

Fabian Yukich *(Deputy Chair)*

Many winegrowers told us that the 2022 vintage was even more challenging than 2020.

MARISCO WINERY, MARLBOROUGH. PHOTO: RICHARD BRIGGS

Advocacy

Over the past 12 months our members have had to make business decisions in conditions of ongoing uncertainty. While New Zealand's response to the pandemic has now shifted away from lockdowns, COVID-19 still remains, and its ongoing effects can be seen in many ways, such as disruptions to global supply chains.

As businesses adapt to the evolving difficulties posed by COVID-19, the NZW Advocacy team has continued to provide guidance and support to help members navigate a changing environment.

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

ONGOING IMPACTS OF COVID-19

COVID-19 was an ever-present challenge this year. The border remained closed, and the Omicron variant became widespread in the community just as the 2022 harvest was ramping up around the country. Many winegrowers told us that the 2022 vintage was even more challenging than 2020.

Increased production costs continue to be a significant concern for our industry. Like every business, winegrowers face large cost increases across the board. The exise rate increased substantially from 1 July 2022, by 6.9% from the year before (equivalent to an increase of 16 cents on a 750ml bottle of wine). For a winery selling in the domestic market, the excise tax is more than they pay on average for grapes, and is the equivalent of $30,000 of tax per hectare. We were grateful for members who wrote to government as part of our campaign against the increase. We publicly expressed disappointment in the outcome and will continue to press the case with government on the impacts of excise escalation. ▸

We successfully obtained a border exception for 75 experienced vintage workers.

NAUTILUS ESTATE, MARLBOROUGH. PHOTO: RICHARD BRIGGS

PROGRESS ON FREE TRADE AGREEMENTS

UK and EU free trade agreements have recently been announced, bringing a number of substantive benefits for winegrowers exporting to these markets. They will remove technical barriers to trade, and minimise burdens from certification and labelling requirements. In addition, the agreements will remove all tariffs on New Zealand wine in their respective markets.

Under the EU agreement, the parties will protect each other's geographical indications (GIs). Many of New Zealand's wine GIs will be protected in the EU for the first time from entry into force of the agreement. In New Zealand, around 1,500 EU wine GIs will be protected and some historic wine names (specifically, port and sherry) will have to be phased out over time by winegrowers.

AN INDUSTRY OF CHOICE

We continue to work closely alongside the horticulture sector and the government, to ensure we have the offshore labour we need to meet our critical seasonal work peaks. We successfully obtained a border exception for 75 experienced vintage workers and continued our involvement in the industry-led RSE quarantine-free travel. While the border reopening will assist in the coming year, the movement of people across the border has yet to return to pre-COVID levels. The recently launched Accredited Employer Work Visa requires all employers to apply through the scheme in order to employ migrants, and pay a substantial application fee, adding additional administration and costs for a business to employ any migrant workers.

Our goal is to be an industry of choice for workers. This year we launched the *Code of Conduct for Our People*, a voluntary guidance document that brings together the main principles winegrowers can follow to demonstrate that workers in our industry are treated fairly and in accordance with the law. We will also engage with government on the proposed modern slavery and worker exploitation legislation. Additionally, we have prepared a Sustainable Workforce Plan that will help guide our workforce activities for the next two years. To support members to meet New Zealand workforce needs, the plan covers five focus areas: attraction, retention, knowledge, innovation and insights.

BEN McNAB, PALLISER ESTATE, MARTINBOROUGH. PHOTO: DEAN ZILLWOOD PHOTOGRAPHY

On the agenda, the Fair Pay Agreements legislation is likely to influence the setting of pay and conditions for our industry's workforce. We will assess the role of NZW to support members once the Act is passed.

GOVERNMENT PROPOSALS ON THE HORIZON

The MfE recently consulted on 'Transforming Recycling', which included proposals for a beverage Container Return Scheme (CRS). NZW supports recycling initiatives to improve environmental outcomes and move towards a circular economy. However, NZW does not support the inclusion of glass beverage containers in the proposed CRS as we do not consider it to be the best method for improving glass recycling. We prefer a targeted glass programme for all glass containers, which we believe will be more cost-effective for consumers and producers and result in better recycling outcomes.

NZW also seeks other improvements to the scheme design to make it more cost-effective and efficient for businesses and consumers, while still meeting the desired environmental outcomes.

We understand that feedback received from the consultation is being considered, and we will continue to work with government as the proposals are further developed.

We continue to engage with officials about challenges faced by winegrowers under the Sale and Supply of Alcohol Act, which have not eased over the past year. We understand the government intends to launch a review of the Act in the coming year, and we want to use the review to make progress on cellar door licensing and charging for samples.

LEADERSHIP AND COMMUNITIES

We recognise the importance of community in the industry, and are grateful that we have now been able to restart more of our in-person leadership initiatives, including our Young Winemaker of the Year and Young Viticulturalist of the Year competitions. These events give the future generation of the New Zealand wine industry the opportunity to focus on their self-development and career progression.

We recognise the importance of community in the industry, and are grateful that we have now been able to resume more of our in-person leadership initiatives.

YOUNG VITS 2021. PHOTO: RICHARD BRIGGS

The Corteva Young Viticulturist of the Year 2021 was Sam Bain from Villa Maria and the Tonnellerie de Mercurey Young Winemaker of the Year 2021 was Ben McNab from Palliser Estate. The 2022 programmes are now underway.

We continue to run the Women in Wine Mentoring Programme and the NZW Mentoring Programme. We are also running a second round of Go You! Workshops around the country. These will offer tools for maintaining good mental health, as well as focusing on looking ahead, making plans, taking action, and generally feeling motivated and enthused about the future.

SUMMARY OF SUBMISSIONS

NZW made or contributed to more than 20 direct submissions to government or written policy proposals on a wide variety of matters. While these submissions were primarily within New Zealand, we also made submissions on some international issues. For more information please contact **advocacy@nzwine.com**. ■

BRI GRAPE DAYS 2022

Research

As NZW's research arm, Bragato Research Institute (BRI) drives New Zealand's grape and wine research, innovation and extension, so our industry can make better business decisions and ensure New Zealand continues to be renowned for its exceptional wine.

See how Felton Road used the Research Winery services this year.

SAUVIGNON BLANC GRAPEVINE IMPROVEMENT PROGRAMME

In December 2021, BRI launched a major research programme to protect and enhance New Zealand Sauvignon Blanc. The programme aims to make New Zealand's wine industry more resilient to a changing climate and other threats by identifying desirable traits among variants, such as improved yield, tolerance to fungal attack, frost, high temperatures and drought, while maintaining the characteristic New Zealand Sauvignon Blanc wine flavour and aroma.

The research programme will use vines' natural response to stress to produce a population of 12,000 new variants of Sauvignon Blanc. Applying the latest genome sequencing technology, BRI will identify plants that exhibit the most useful traits within this large population.

The programme's partners will invest $18.7 million over seven years, making this the industry's largest research project ever. MPI is investing $7.5 million, NZW up to $6 million in levy funds, plus cash and in-kind contributions of $5.2 million directly from 28 participating New Zealand wine companies.

5 STAR RESEARCH WINERY

In November 2021, the New Zealand Green Building Council awarded the Research Winery a 5 Green Star NZ Built rating, making it the first building in Marlborough, and New Zealand's first winery, to receive the certification.

Vintage 2022 was BRI's busiest yet with 193 ferments and 7.8 tonnes of fruit, an increase of 45% from vintage 2021. The ferments allowed clients to trial different winemaking techniques, ingredients, or the impact of vineyard practices under tightly controlled conditions.

DELIVERING RESEARCH TO MEMBERS

BRI's Extension team is dedicated to delivering research findings, and ensuring information

The Sauvignon Blanc Grapevine Improvement Programme's partners will invest $18.7 million over seven years, making this the industry's largest research project ever.

BRI GRAPE DAYS 2022

and tools produced by research are being adopted and applied, so members can make better-informed decisions for their businesses.

In June 2022, the latest industry-driven research was presented to 900 members at Grape Days. This year's programme, Winegrowing in a Changing Environment, dug into topics including trunk disease, agroecology, reducing carbon emissions, alternative pruning methods and responding to climate events, with emphasis on helping members apply the findings.

In addition to Grape Days, BRI led 22 other regional workshops for a further 1,024 attendees, and BRI Extension produced 109 research outputs, including articles, fact sheets and presentations.

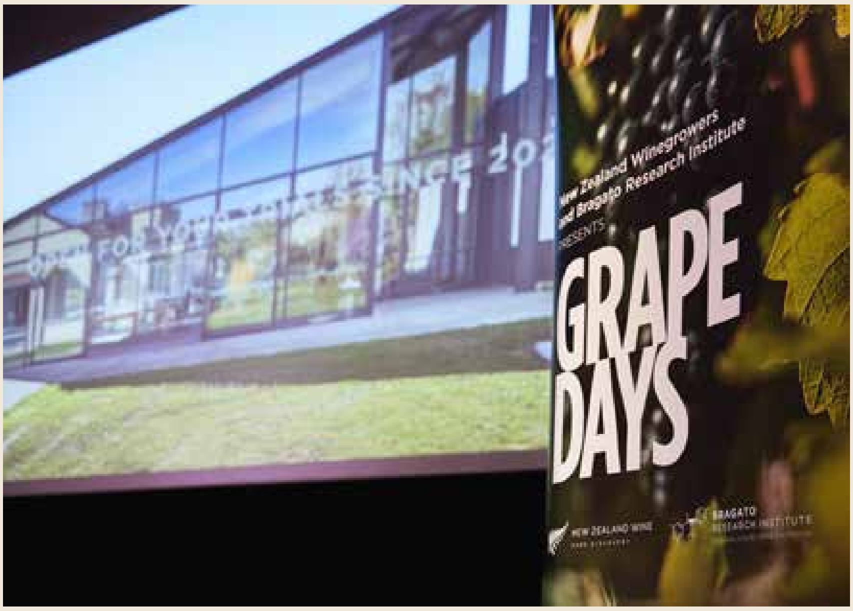
STRATEGY TO SUPPORT OUR VISION

This year, BRI has developed a new five-year strategy to support our vision—to be at the heart of an evolving, sophisticated wine innovation system. Together with measurable goals, and strategic actions defining the path towards achieving those goals, BRI is now poised to move into a more mature, more sophisticated stage of growth.

BRI **engages** with industry to identify research needs and knowledge gaps.

Vintage 2022 was BRI's busiest yet with 193 ferments and 7.8 tonnes of fruit, an increase of 45% from vintage 2021.


BRI EXTENSION GROWER WORKSHOP



BRI GRAPE DAYS 2022


BRI GRAPE DAYS 2022

We generate new **research** on behalf of the industry, conducting research in-house and with our major research partners. BRI also searches out relevant international knowledge, translating it to New Zealand conditions.

Our dedicated team supports **knowledge transfer and extension** to effectively deliver research findings, so that members can make better-informed decisions for their businesses.In addition, BRI offers a growing range of commercial services, including winery trials and sensory services at our Research Winery, soil consulting, and molecular genomic testing at our new Grapevine Improvement Lab on Lincoln University campus.

INVESTMENT IN THE FUTURE

BRI is focused on grape and wine research that fills knowledge gaps specific to New Zealand's current and future needs. Last year, BRI invested a total of $8.2 million into research, leveraging levy funding of $2.4 million.

We have leveraged members' levy funds by seeking funding from government and other funders, co-funding from individual members, and collaborations with other research organisations. Developments over the past year include securing:

- $5 million from the Ministry of Business, Innovation and Employment (MBIE) to be invested into research capability over a two-year period
- $7.4 million from MPI for our Grapevine Improvement Programme.

BRI's vision is to be at the heart of an evolving, sophisticated wine innovation system.

BRI is focused on grape and wine research that fills knowledge gaps specific to New Zealand's current and future needs.

THE INDUSTRY'S MAJOR LEVY-FUNDED PROGRAMMES

Vineyard Ecosystems Programme

Objective: To understand how management choices affect New Zealand vineyards and to increase sustainable winegrowing in the future. The programme began in 2015 and was extended to December 2022.

Total funding: $7 million comprising $3.5 million each from NZW levies and the MBIE Partnership Scheme.

Research: The programme examines how management practices impact the environment and grapevine performance. Work now focuses on grapevine trunk disease and communicating findings from the programme. Vineyard Ecosystems is ending with a national event in September 2022 to present research findings through the lens of practical application and an international research context.

Pinot Noir Programme

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

Total funding: $10.3 million comprising $1 million from NZW levies and $9.3 million from MBIE's Endeavour Fund.

Research: The programme is wrapping up the research relating to sensory perception, chemistry, and viticultural and winemaking techniques. BRI is planning activities over the next three years to extend our learnings on defining quality management practices for reaching desired quality parameters and breaking the yield/quality seesaw.

IN ADDITION TO THE MAJOR PROGRAMMES, BRI HAS OVER 30 RESEARCH PROJECTS UNDERWAY, INCLUDING:

Hail damage and post-frost nutrition
Following the 2019 adverse climate events in Hawke's Bay and North Canterbury, BRI captured information to understand the impact and evaluate the different intervention options.

Cover cropping
BRI sought to answer the what, the why and the how of cover cropping, and provide an overview of the impact of cover cropping on measure of soil health and grapevine performance.

Herbicide buffering
Growers have been increasingly concerned about the impact of weed management practices on soil health. BRI carried out a research project looking into soil microbial responses to undervine treatments.

Lab on a chip in-house enzymatic testing
BRI is participating in a University of Canterbury-led project to develop a prototype for a simple, in-house, real-time test for components such as sugars, malic acid, YAN, and SO2, without the need for lab equipment.

Managing powdery mildew in the winery
BRI investigated the efficacy of three fining agents to improve the quality of wines made from Pinot Noir grapes infected with powdery mildew. The project sought possible solutions for making wines from grapes that would otherwise be rejected.

National grapevine collection clean-up
BRI is investing in the care of the national vine collection at the Lincoln lab and is conducting a virus clean-up of the plants using a tissue culture technique. ■

To find out more about BRI's research projects, visit **bri.co.nz/current-research**

Sustainability

The New Zealand wine industry has a longstanding commitment to sustainability. This commitment is a key element of our industry's reputation, and it is our members' continued dedication to sustainable practices that drives this reputation forward. To us, it means growing grapes and producing our world-famous wines in a way that we can do so for generations to come.

In 2022 our industry's sustainability credentials are an essential part of our social license to operate. We are rising to the challenges presented by increased consumer expectations, increased environmental regulation and the rising costs of doing business. Change is inevitable; but our long-standing commitment to going above and beyond means we are well placed for success.

A SNAPSHOT OF OUR SUSTAINABILITY JOURNEY

In April we released the 2022 Sustainability Report to coincide with Earth Day. The first Sustainability Report released since 2016, it provides a snapshot of the New Zealand wine industry's sustainability journey.

SELINI ESTATES, HAWKE'S BAY

CRAGGY RANGE, MARTINBOROUGH

Showcasing data collected from the 1,840 vineyards and 310 wineries certified under SWNZ, the report highlighted how sustainability differentiates the New Zealand wine industry on the world stage. It's the positive individual actions of New Zealand wine businesses that add up to make a big impact across the wine industry, and that are helping to deliver lasting change. In 2022, backing up claims with transparent evidence has never been more important, and we have focused on using the quantitative data we collect through SWNZ to demonstrate our sustainability credentials and leadership amongst the world's wine-producing nations.

Sustainability means consumers can trust that their bottle of New Zealand wine has been made with respect for our world and for our people.

Over 96% of total vineyard area in New Zealand is now certified as sustainable through the SWNZ programme, with 10% of New Zealand wineries holding organic certification. It's an achievement our industry can be proud of, but the real work is ensuring we not only sustain but elevate our position with an enduring commitment to continuous improvement. Sustainability means consumers can trust that their bottle of New Zealand wine has been made with respect for our world and for our people.

ENSURING EFFICIENT WATER USE AND THE PROTECTION OF WATER QUALITY

During the past year the government has initiated its most significant freshwater regulatory reform in a generation. By the end of 2022 the government expects to release regulations that require all farms over five hectares to develop freshwater farm plans, which seek to mitigate the risks of that farm's activities on the freshwater environment.

The industry needs to adapt to meet the changing regulatory environment. Over the past year the Sustainability team has been working with the MfE and regional councils to position SWNZ as the vehicle for members to meet these farm-planning requirements. Using SWNZ will mean less duplicated data entry and fewer transaction costs for members. While the regulations are yet to be released, the team has sought to partner with MPI to assess how we may need to enhance the SWNZ programme to meet planning requirements and improve our reporting so that we can better illustrate our environmental credentials to regional councils.

We are also seeking to partner with MfE to update our software systems to enable farm planning and work with members to educate them on what is required. We will keep members updated on progress with these initiatives throughout the year ahead.

BLACK BIRCH VINEYARD, MARLBOROUGH. PHOTO: RICHARD BRIGGS

It's the positive individual actions of New Zealand wine businesses that add up to make a big impact across the wine industry, and that are helping to deliver lasting change.

TAKING ACTION TO REDUCE INDUSTRY EMISSIONS

Climate change is a significant risk to the New Zealand wine industry. To address this risk our bold target is to be a carbon-neutral industry by 2050. During the past year the Sustainability team has taken the lead in implementing a four-step action plan—measure, reduce, educate, communicate—to help industry members reach this objective. The 2020/21 season was the first year that we collected emissions data from both wineries and vineyards through SWNZ. This data represents approximately 80% of the total emissions footprint associated with the production of wine, making the New Zealand wine industry unique amongst key wine-producing countries in being able to make that claim.

Through SWNZ, NZW provided members with individualised greenhouse gas emissions reports so that members could benchmark their performance and identify areas for improvement. In June 2022 we held a climate change action month, with a focus on educating members on how to use the new individualised emissions reports to inform decision-making. We also hosted a series of weekly webinars connecting members with leaders in the industry to help them reduce their emissions. Climate change mitigation will continue to be a key focus in coming years.

BIOSECURITY: INFORM AND ENGAGE

Protecting our industry from the impact of pests and disease is vital to ensure high quality and distinctive New Zealand wine. Over the last year the Biosecurity team has launched the Being a Biosecurity Champion Programme, which has distributed biosecurity resource packs and assisted vineyard members with biosecurity planning for their sites. According to data from the Biosecurity Vineyard Register, 60% of vineyards now have a biosecurity plan in place, and the team continues to work towards improving this figure. In 2021, the Being a Biosecurity Champion Programme was recognised as a finalist in the industry category of the New Zealand Biosecurity Awards.

Ensuring a successful partnership with government is also crucial for improved biosecurity. NZW continues to be an active participant in the Government Industry

Agreement for biosecurity readiness and response and works as a member of the Plant Germplasm Import Council to reduce the barriers to the importation of new plant material while ensuring biosecurity risk management.

ORGANIC WINE: FROM STRENGTH TO STRENGTH

New Zealand's organic wine sector continues to exhibit strong growth, with the number of organic producers growing every year. Figures released by BioGro in September 2021 painted a picture of a thriving organic industry. The country boasted 235 organic vineyards at that time, 22% of which were in the initial three years of conversion to organic production. There were 130 organic wineries and brand owners.

Almost half of New Zealand's organic vineyard plantings are in Marlborough. Of the other wine regions, Central Otago is particularly notable in its commitment to organic production; 25% of all vineyard land there is now managed under organic certification.

NZW and the organic producers' association Organic Winegrowers New Zealand (OWNZ) continue to work closely together to grow the organic wine industry. OWNZ's biggest event of 2021/22 was the 2021 Winter Symposia series, which drew hundreds of attendees from across the industry to spend a day learning from leading-edge organic producers. Other OWNZ events include field days and webinars for growers, as well as the ever-popular Organic Wine Week in September, celebrating New Zealand organic wines at home and worldwide.

Submissions to Government

August 2021 Ministry for Primary Industries: *Submission on Biosecurity (Information for Incoming Passengers) Amendment Bill*

August 2021 Ministry for Primary Industries: *Submission on enabling imports of* vitis cordifolia *nursery stock*

September 2021 Environmental Protection Authority: *Submission on Glyphosate Call for Information*

October 2021 Ministry for the Environment: *Submission on the Freshwater farm plan regulations: Discussion document*

February 2022 Ministry for Primary Industries: *Submission on the Plant Germplasm Import Pathway Strategy*

May 2022 WorkSafe public consultation: *Hazardous Substances Setting Restricted Entry Intervals for Specified Pesticides*

Marketing

Identifying innovative ways to tell the New Zealand wine story and expand reach in an evolving virtual world has been a key focus of the NZW Marketing team over the past year, with collaborative campaigns across many of NZW's key international markets.

NEW ZEALAND WINE ON THE WORLD STAGE

In September 2021, NZW worked with OWNZ to celebrate Organic Wine Week, including a week's worth of thought-provoking activities around the hero webinar, The Rise of Organic Wine in New Zealand. In February 2022, NZW held the second New Zealand Wine Week, following its success a year earlier. Despite COVID-19 changing the activity scope to virtual-only, two hero webinars were led by NZW: Pinot Noir Masterclass—An Exploration of our Subregions, and The Business of Wine in New Zealand—2022 and Beyond. In the latter, well-known wine journalist Richard Siddle hosted a panel of experts including Rob McMillan, founder of the wine division at Silicon Valley Bank, and his perspectives on the challenges and opportunities for New Zealand wine were a key highlight.

Work is underway to redefine the 'brand essence' of New Zealand Wine—highlighting what is unique and special about our wine, our viticulture and our people.

In our fast-evolving key export markets, it is becoming increasingly important that the overarching New Zealand wine brand messaging is clear and distinctive, to maximise cut-through and appeal to developing audiences. In order to keep New Zealand wine top of mind, the decision was made earlier this year to redefine and strengthen the brand position for New Zealand wine. Work is underway to define the 'brand essence' of New Zealand wine, and the basis of this will highlight what New Zealand wine stands for as an industry – what is unique and special about our wine, our viticulture and our people. It will highlight what sets New Zealand apart from other wine regions of the world and, more importantly, provide the New Zealand wine industry with the tools to use in their own marketing. This piece of work will be brought to life at the end of 2022. ▸

EDINBURGH MASTERCLASS. PHOTO: SHANNON TOFTS PHOTOGRAPHY

In May 2022, NZW launched the Pour Yourself a Glass of New Zealand campaign, a month-long celebration of New Zealand's white wine varieties.

"New Zealand Wines [Winegrowers] is of the very best wine trade organisations in the world. Always consistent with lots of current information."

@Talk-a-Vino, twitter.com, 8 February 2022

DISCOVER NEW ZEALAND WINE ONLINE

In a noisy digital environment, getting cut-through is an increasing challenge, so a creative approach has been critical. In May 2022, NZW launched the Pour Yourself a Glass of New Zealand campaign, a month-long celebration of New Zealand's white wine varieties. The campaign came at a time when New Zealand's top three exported white wine varieties are internationally celebrated, with Sauvignon Blanc Day, Pinot Gris Day and Chardonnay Day all falling in May. Looking for creative ways to shine a spotlight on the breadth of high-quality white wine that New Zealand produces, the crusade to secure the White Wine Emoji was created and formed as part of the Pour Yourself a Glass of New Zealand campaign. The campaign not only reached 19 million people globally, it also showed a lighter side to our communications while broadening our audiences; appreciating wine isn't always about scores and soils. Coupled with this campaign, NZW held a series of in-person tasting events targeting trade and media in North America, the UK and Ireland.

NZW also launched the New Zealand Wine Trade Hub on nzwine.com/en/trade, to provide the global wine trade with a variety of resources to support sales of New Zealand wine. The Hub features the Global New Zealand Wine Catalogue, highlighting what and where New Zealand wines are currently distributed and who is seeking distribution, alongside other important resources for trade.

PARTNERSHIPS TO GROW NEW ZEALAND WINE

Leveraging partnerships to widen New Zealand wine's reach remained a strong focus, and NZW continues to partner with New Zealand government agencies, sector industry bodies and wine thought leaders. Throughout the year, NZW worked closely with NZTE in key export markets to accelerate New Zealand winery growth, and continued to leverage the Made with Care campaign—a campaign to drive preference for New Zealand food and beverage. A key piece of work with NZTE was a co-funded research study of the USA wine market—NZ Wine in the US: Where to from here? The study was comprised of both quantitative and qualitative data, addressing what specifically is driving the growth of New Zealand wine in the USA; who the consumers are, why they are drinking New Zealand wine, and where they reside. Valuable information was also gleaned from conversations with distributors, importers, trade and engaged consumers, to provide qualitative data.

WAIRAU RIVER WINES, MARLBOROUGH. PHOTO: RICHARD BRIGGS

New ways to shine a spotlight on the New Zealand wine industry sustainability story were also identified. In May this year, NZW co-hosted the Oceania leg of the virtual Green Wine Future 2022 conference. It was a valuable opportunity for a global audience to turn its head to New Zealand wine, hear our industry's commitment to sustainable practices, and showcase our 2022 Sustainability Report. The New Zealand wine industry had strong representation with 10 speakers addressing our efforts to mitigate climate change amongst the 170 speakers, and Hon Damien O'Connor making the keynote speech on the Oceania day of the conference.

As the world begins to emerge from the pandemic and rebuild, NZW is working to protect and enhance the strength of the New Zealand wine story at a time when brand power is more important than ever. While the past year has continued to present challenges, the NZW Marketing team continues to evolve, operate and adapt with renewed confidence in NZW's key global markets. ■

"New Zealand Sauvignon Blanc is one of wine's greatest commercial successes ever. Wine professionals may be a bit snooty about its simplicity and, often, light sweetness but wine drinkers all over the world love it the minute they are introduced to it."

Jancis Robinson, jancisrobinson.com, May 2022

Global PR & Media Outreach

The NZW Global PR Programme ensures that New Zealand wine continues to be a vibrant part of the global media conversation with key metrics growing year on year.

EQUIVALENT ADVERTISING VALUE
$6.1 MILLION

MEDIA CLIPPINGS
164

REACH
200 MILLION

Pour Yourself a Glass of New Zealand and the White Wine Emoji campaign

The Pour Yourself a Glass of New Zealand and the White Wine Emoji campaign was a creative new way to turn heads towards the New Zealand wine story. While the White Wine Emoji outcome will not be announced until the end of 2022, the campaign itself was very successful and saw a high campaign return on investment.

EQUIVALENT ADVERTISING VALUE
$757K

REACH
19 MILLION

MEDIA CLIPPINGS
87

SOCIAL MEDIA ENGAGEMENTS
140K

820
TOOLKIT DOWNLOADS

Financials

High-level breakdown (year to 30 June 2022)

NZW is the industry organisation of and for the winemakers and grape growers of New Zealand.

These are the accounts for NZW and its subsidiaries, NZW Research Centre Limited trading as BRI and GVI Limited Partnership (GVI LP).

Operating income includes the grape and wine levies. These are used to fund marketing, research, environment and advocacy activities. User pays activities include marketing events in New Zealand and overseas, SWNZ, provision for the Wine Export Certification Service and Young Viticulturist and Young Winemaker competitions.

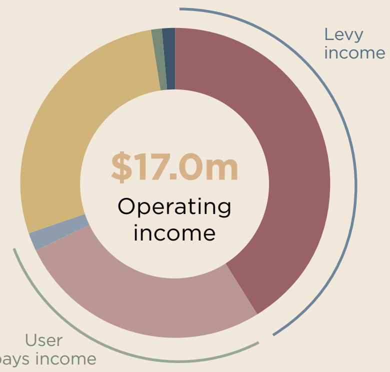
BRI provides world-leading science, research and innovation to benefit New Zealand's entire grape and wine industry.

GVI LP is managing a research programme to develop and select new and improved variants of our existing Sauvignon Blanc clones.

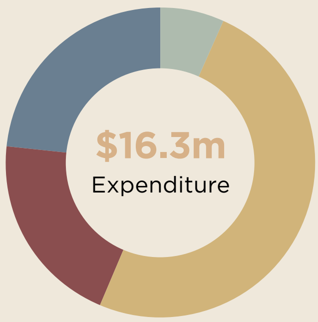
The financial information presented has been extracted from the audited financial statements of NZW for the year ended 30 June 2022.

OPERATING INCOME	EXPENDITURE	ASSETS/RESERVES
$17.0m ↑2%	**$16.3m** ↓4%	**$12.7m**

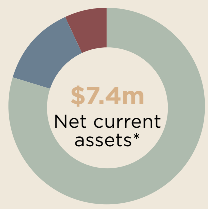
OPERATING INCOME AND RESERVES SUMMARIES



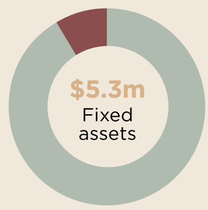
- Wine levy $7.0m ↓3%
- Grape levy $4.5m ↑80%
- Marketing user pays 0.3m ↓40%
- SWNZ $0.02 ↓33%
- External funding for research $4.7m ↓21%
- Young Vit & Winemaker $0.2 ↑4%
- Other $0.2m ↓32%



- Social $1.1m ↓39%
- Economic $8.1m ↓2%
- Environmental $3.3m ↓13%
- General $3.8m ↑23%



- Levy incl BRI $5.9
- Biosecurity $1m
- User pays $0.5m



- Winery incl fitout and equip $4.85m
- Other $0.45m

* Current assets less total liabilities

Breakdown of expenditure by objective

Key achievements	Levy	Non-levy
Research and innovation Research Winery (178 ferments processed) Sauvignon Blanc grapevine improvement launched	$2.6m ↑16%	$3.7m ↓18%
International marketing and tourism Global PR and media outreach, including the White Wine Emoji campaign	$1.9m ↓6%	$0.2m ↑2%
Administration Technology review scoping completed	$2.0m ↑13%	$0.5m ↑29%
Events in New Zealand	$0.1m ↓2%	$0.1m ↓87%
Environment SWNZ programme Spray Days	$1.4m ↑18%	$0.1m ↑12%
Member information Grape Days (900 members attended)	$1.1m ↓3%	
Regions	$1.0m ↓7%	
International trade (advocacy) UK and EU free trade agreements Supporting Dr John Barker's candidacy for OIV	$0.2m ↓9%	$0.1m ↓16%
Domestic trade (advocacy) COVID-19 support to members 13 domestic submissions to government	$0.6m ↓6%	
People Women in Wine Labour strategy and RSE Young Viticulturist and Young Winemaker competitions	$0.2m ↓13%	$0.2m ↓11%
Biosecurity Building industry capability Six submissions to government	$0.3m ↑2%	
Total	$11.4m ↑4%	$4.9m ↓19%
Total expenditure		$16.3m ↓4%

Statistics

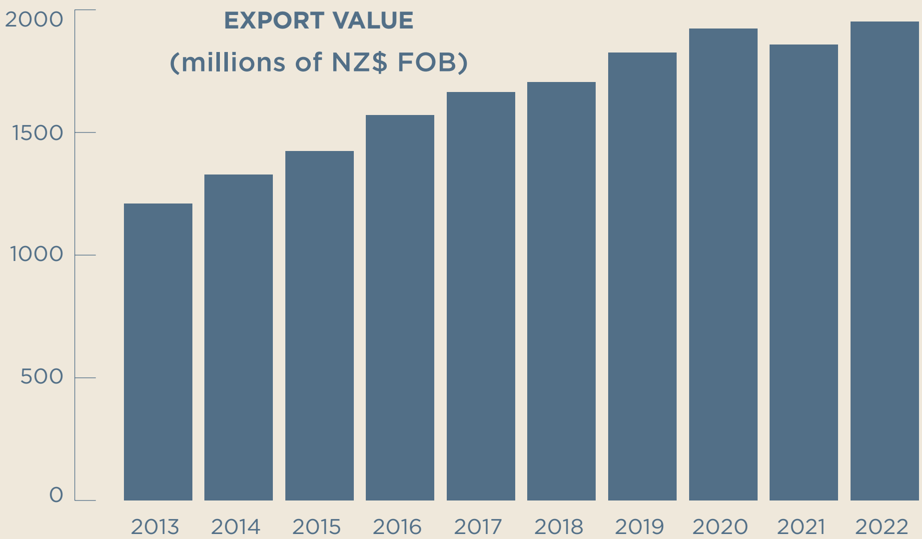
Summary of New Zealand wine (2013-2022)

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Number of wineries	698	699	673	675	677	697	716	717	731	744
Number of growers	835	858	762	747	726	699	692	694	732	706
Producing area (hectares)	35,182	35,510	35,463	36,226	36,943	38,073	39,061	39,934	40,323	*41,603
Average yield (tonnes per hectare)	9.8	12.6	9.1	12.0	10.7	11.0	10.7	11.4	9.2	12.8
Average grape price (NZ$ per tonne)	1,688	1,666	1,732	1,807	1,752	1,841	1,890	1,920	2,025	N/A
Tonnes crushed (thousands of tonnes)	345	445	326	436	396	419	413	457	370	532
Total production (millions of litres)	248.4	320.4	234.7	313.9	285.1	301.7	297.4	329.04	266.4	383.0
Domestic sales of NZ wine (millions of litres)	51.7	49.9	61.9	56.2	52.1	53.6	50.6	50.0	49.2	*42.3
Consumption per capita NZ wine (litres)	11.6	11.2	13.7	12.2	11.0	10.9	10.3	10.0	9.6	*8.3
Total domestic sales of all wine (millions of litres)	92.5	90.6	96.0	93.4	92.0	94.5	93.1	91.7	90.2	*89.5
Consumption per capita all wines (litres)	20.8	20.3	21.2	20.2	19.5	19.2	18.9	18.3	17.7	*17.5
Export volume (millions of litres)	169.6	186.9	209.4	213.4	253.0	255.0	270.4	286.5	284.9	266.1
Export value (millions of NZ$ FOB)	1,210	1,328	1,424	1,570	1,663	1,705	1,825	1,923	1,870	**1,953

N/A – Not yet available
*Estimate
**This data is subject to confirmation by Stats NZ

PRODUCING AREA (ha)

2013
35,182
2022
41,603*



New Zealand Winegrowers membership (2013-2022)

Wineries by size*	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Small	617	611	587	581	582	603	624	628	645	662
Medium	71	65	69	78	77	77	73	69	67	66
Large	10	23	17	16	18	17	19	20	19	16
Total	**698**	**699**	**673**	**675**	**677**	**697**	**716**	**717**	**731**	**744**

*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	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Northland	13	15	14	15	16	17	20	20	18	17
Auckland	116	114	111	110	109	102	100	99	99	98
Waikato/Bay of Plenty	13	13	12	9	8	10	7	9	8	6
Gisborne	21	19	18	18	18	17	16	15	33	37
Hawke's Bay	77	76	75	76	79	91	98	100	104	107
Wairarapa	65	67	67	68	64	69	72	67	67	67
Marlborough	152	151	140	141	139	141	150	158	159	160
Nelson	38	37	35	36	36	38	42	38	35	37
North Canterbury	70	66	67	64	65	67	68	71	68	71
Central Otago	124	132	127	133	137	136	135	133	134	137
Waitaki Valley						4	4	4	3	4
Other areas	9	9	7	5	6	5	4	3	3	3
Total	**698**	**699**	**673**	**675**	**677**	**697**	**716**	**717**	**731**	**744**

Grape growers by region	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Northland								4	4	3
Auckland	11	11	10	5	4	3	8	5	5	5
Waikato/Bay of Plenty	2									
Gisborne	53	48	41	41	36	33	31	27	14	12
Hawke's Bay	104	102	74	71	65	62	58	57	65	59
Wairarapa	30	17	14	15	17	13	14	14	19	25
Marlborough	548	581	535	534	519	510	509	514	531	518
Nelson	40	52	38	36	37	35	27	27	32	31
North Canterbury	14	15	18	14	14	9	13	10	19	15
Otago	33	32	32	31						
Central Otago					33	33	32	36	43	38
Waitaki Valley					1	1				
Total	**835**	**858**	**762**	**747**	**726**	**699**	**692**	**694**	**732**	**706**

Auckland and Northland are reported separately from 2020

Statistics

New Zealand producing vineyard area (2013-2022)

By grape variety (ha)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022*
Sauvignon Blanc	20,015	20,029	20,497	21,400	22,230	23,426	24,605	25,160	25,988	26,559
Pinot Noir	5,488	5,509	5,514	5,519	5,572	5,588	5,549	5,642	5,805	5,807
Chardonnay	3,202	3,346	3,117	3,116	3,114	3,106	3,179	3,222	3,186	3,187
Pinot Gris	2,403	2,451	2,422	2,439	2,369	2,471	2,413	2,593	2,766	2,809
Merlot	1,255	1,290	1,239	1,198	1,211	1,133	1,093	1,087	1,078	1,077
Riesling	787	784	767	753	721	679	572	569	620	619
Syrah	408	433	436	426	439	432	440	437	433	444
Cabernet Sauvignon	301	289	275	253	249	250	216	219	207	207
Gewürztraminer	334	376	277	242	229	221	206	217	186	197
Malbec	142	127	129	119	121	114	111	111	98	98
Sauvignon Gris**			104	113	109	105	105	105	102	102
Cabernet Franc	119	113	109	99	91	97	91	93	91	91
Viognier**			129	119	97	97	89	85	69	65
Other varieties	728	764	448	430	391	354	394	395	320	341
TOTAL	**35,182**	**35,511**	**35,463**	**36,226**	**36,943**	**38,073**	**39,061**	**39,934**	**40,323**	**41,603**

By region (ha)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022*
Northland**							73	71	75	76
Auckland**							313	319	283	285
Auckland/Northland	414	392	403	387	387	392				
Waikato/Bay of Plenty	24	25	16	3	13	15	12	12	13	13
Gisborne	1,599	1,915	1,440	1,350	1,246	1,181	1,163	1,191	1,221	1,245
Hawke's Bay	4,846	4,774	4,638	4,641	4,615	4,678	4,883	***5,034	4,737	4,786
Wairarapa	991	995	1,003	1,005	932	969	1,030	1,039	1,089	1,090
Marlborough	22,819	22,907	23,452	24,365	25,244	26,288	27,176	27,808	28,883	29,415
Nelson	1,095	1,123	1,141	1,135	1,093	1,162	1,105	1,102	1,086	1,082
North Canterbury	1,435	1,488	1,428	1,419	1,472	1,457	1,368	1,369	1,489	1,497
Central Otago	1,959	1,932	1,942	1,880	1,886	1,873	1,875	1,930	2,029	2,055
Waitaki Valley				41	55	58	63	59	58	59
TOTAL	**35,182**	**35,511**	**35,463**	**36,226**	**36,943**	**38,073**	**39,061**	**39,934**	**40,962**	**41,603**

*Projections submitted in the 2022 Vineyard Report
**Reported seperately since 2015
***The Hawke's Bay figures within the 2020 Annual Report contained an error that has now been corrected in the 2021 Vineyard Report. The Hawke's Bay vineyard area was overstated in the 2020 Annual Report by approximately 450 hectares. The error largely related to the figures for Sauvignon Blanc.

Auckland and Northland reported seperately from 2019

Central Otago and Waitaki Valley reported seperately from 2016

Source: New Zealand Winegrowers Vineyard Register Reports

New Zealand vintages (2013-2022)

By grape variety (tonnes)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Sauvignon Blanc	228,781	310,240	216,078	303,711	285,862	296,573	302,157	326,058	268,079	393,956
Pinot Noir	31,775	36,499	25,763	35,661	28,760	35,095	26,944	34,105	22,029	34,569
Pinot Gris	22,042	23,880	19,707	24,892	20,755	22,824	20,953	28,849	20,987	30,465
Chardonnay	27,184	28,985	27,015	29,162	26,843	26,371	25,729	27,568	23,507	29,762
Merlot	10,076	10,756	9,397	9,321	7,714	10,623	9,240	11,166	9,877	7,535
Riesling	5,932	6,013	4,535	5,937	3,880	3,776	4,776	4,510	4,407	5,024
Rosé									530	4,518
Syrah	2,240	2,178	1,497	1,756	1,733	2,126	2,230	2,392	2,537	2,104
Sauvignon Gris				1,182	944	1,080	1,002	880	1,178	1,161
Gewürztraminer	1,788	2,264	1,761	2,221	1,047	976	834	1,167	707	1,179
Cabernet Sauvignon	1,465	1,742	1,376	1,537	974	1,169	1,076	1,210	1,156	834
Malbec	825	1,135	586	483	697	782	741	793	535	663
Other Reds	262	537	457	677	401	456	506	522	540	526
Grüner Veltliner		341	228	276	253	329	347	369	275	490
Cabernet Franc	421	582	485	616	373	350	473	452	458	472
Albariño						162	269	284	371	451
Viognier	519	1,148	720	771	266	444	318	235	488	282
Semillon	721	507	425	466	249	385	304	292	289	263
Other Whites	1,052	1,646	1,294	727	824	250	232	271	144	193
Pinotage	400	425	494	374	145	153	142	122	96	131
Arneis	220	336	268	257	239	152	91	162	91	86
Muscat Varieties	634	455	301	329	450	323	200	234	33	84
Survey total	**336,337**	**429,669**	**312,387**	**420,356**	**382,409**	**404,399**	**398,564**	**441,640**	**358,316**	**514,749**
Industry total*	**345,000**	**445,000**	**326,000**	**436,000**	**396,000**	**419,000**	**413,000**	**457,000**	**370,000**	**532,000**

By region (tonnes)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Northland	130	210	203	92	121	113	319	269	248	195
Auckland	789	1,392	824	1,267	934	787	1,585	1,249	1,239	1,343
Gisborne	15,567	16,192	17,280	15,944	16,337	13,000	16,238	18,959	17,450	19,334
Hawke's Bay	38,829	44,502	36,057	42,958	33,679	41,061	37,173	43,247	41,138	40,172
Wairarapa	4,798	5,743	3,559	5,049	3,822	4,592	4,390	4,472	3,131	5,363
Marlborough	251,630	329,571	233,182	323,290	302,396	313,038	305,467	343,036	269,521	414,649
Nelson	7,777	10,494	6,777	10,028	8,540	9,120	12,370	11,572	7,804	10,867
North Canterbury	8,348	10,962	5,395	12,170	8,240	11,157	8,534	9,861	7,291	9,779
Central Otago	8,407	10,540	8,951	9,177	8,324	11,358	11,868	8,515	10,324	12,575
Waitaki Valley						170	41	114	23	188
Other**	62	63	159	381	16	3	579	347	147	286
Survey total	**336,337**	**429,669**	**312,387**	**420,356**	**382,409**	**404,399**	**398,564**	**441,640**	**358,316**	**514,749**
Industry total*	**345,000**	**445,000**	**326,000**	**436,000**	**396,000**	**419,000**	**413,000**	**457,000**	**370,000**	**532,000**

*The data shown are the results from the New Zealand Winegrowers Annual Vintage Surveys, whereas 'industry total' represents the tonnes crushed by the total wine industry.
The difference between 'survey total' and 'industry total' is data from wine companies who did not respond to the surveys.
**Waikato/Bay of Plenty reported under Other

Source: New Zealand Winegrowers Annual Vintage Surveys

Statistics

New Zealand wine exports (2013-2022)

		2013	2014	2015	2016	2017	2018	2019	2020	2021	2022*
USA	L	43.362	48.914	53.858	61.636	72.929	72.701	76.234	82.598	80.252	93.152
	NZ$	283.651	328.049	372.241	460.600	517.258	521.738	557.000	622.150	589.121	694.116
United Kingdom	L	47.622	51.868	59.745	58.936	74.638	74.435	82.728	82.448	80.005	67.518
	NZ$	278.415	318.611	353.931	381.809	389.272	386.740	446.584	464.092	448.864	434.160
Australia	L	49.764	53.709	57.528	52.960	59.672	56.059	56.335	61.852	65.819	57.397
	NZ$	373.048	380.851	362.188	361.677	371.099	366.997	367.722	365.083	379.836	365.881
Canada	L	7.272	7.703	9.583	10.612	11.388	12.776	12.412	12.278	11.036	12.917
	NZ$	78.177	78.941	94.906	107.372	107.434	127.933	130.133	135.961	112.725	141.355
China	L	2.219	1.810	1.858	2.028	2.270	2.520	2.525	2.002	2.088	2.613
	NZ$	26.868	24.803	27.069	27.593	31.758	37.385	39.177	26.698	28.017	36.426
Germany	L	1.532	2.682	2.073	2.667	1.728	1.685	8.413	14.021	13.503	7.030
	NZ$	9.532	14.459	10.018	14.501	10.740	9.061	44.917	66.384	56.854	36.354
Ireland	L	2.052	2.212	2.512	2.888	2.986	3.448	3.020	3.243	3.578	3.570
	NZ$	14.420	16.353	17.472	21.309	21.658	27.183	25.874	27.011	33.421	33.003
Netherlands	L	4.128	5.022	6.744	6.801	8.203	9.322	4.767	3.707	3.102	2.734
	NZ$	26.743	33.383	41.479	44.480	45.439	50.853	28.655	26.149	24.095	23.485
Singapore	L	1.285	1.572	1.580	1.567	1.306	1.338	1.314	1.148	1.148	1.001
	NZ$	16.148	21.326	20.691	20.570	18.596	19.165	18.884	16.526	16.912	17.129
Japan	L	1.152	1.196	1.193	1.150	1.273	1.225	1.342	1.272	1.143	1.324
	NZ$	13.646	13.908	13.773	13.796	14.565	17.047	15.003	14.873	12.299	14.954
Hong Kong	L	1.570	1.348	1.399	1.283	1.353	1.178	1.067	1.070	1.337	0.968
	NZ$	20.474	16.853	17.680	17.333	18.553	15.671	13.337	14.112	17.868	14.586
Denmark	L	0.790	0.864	1.191	0.942	1.252	1.322	1.362	1.381	1.553	1.790
	NZ$	5.388	6.652	8.042	7.182	8.368	8.594	8.897	8.719	9.769	12.177
Sweden	L	1.563	1.562	1.630	1.843	1.779	1.521	1.631	1.801	1.167	1.015
	NZ$	13.090	13.020	13.163	15.276	14.208	12.903	13.250	15.173	9.853	8.861
Norway	L	0.224	0.334	0.270	0.384	0.320	0.316	0.550	0.605	0.998	0.876
	NZ$	1.591	2.742	2.045	2.511	2.508	2.648	3.569	3.946	5.969	5.792
Finland	L	0.185	0.259	0.310	0.258	0.248	0.261	0.314	0.295	0.315	0.283
	NZ$	1.572	2.283	2.455	2.388	2.004	2.340	2.809	2.477	2.824	2.771
Others	L	4.942	5.834	7.947	7.516	11.618	14.979	16.351	16.740	17.901	11.896
	NZ$	47.758	56.124	67.307	70.938	89.507	101.377	109.304	113.339	121.748	112.323
Total	**L**	**169.669**	**186.889**	**209.419**	**213.371**	**252.962**	**255.093**	**270.364**	**286.461**	**284.942**	**266.081**
	NZ$	**$1,210.525**	**$1,328.358**	**$1,424.461**	**$1,569.515**	**$1,662.968**	**$1,704.644**	**$1,825.116**	**$1,922.694**	**$1,870.173**	**$1,953.372**

All litre and NZ$ figures are in millions
*This data is subject to confirmation by Stats NZ

Source: Stats NZ

New Zealand wine exports by market (year end June 2022)

		White 750ml	White other	White total	Red 750ml	Red other	Red total	Sparkling	Fortified	Total
USA	L	64.888	24.953	89.841	2.646	0.263	2.909	0.395	0.007	**93.152**
	NZ$	558.619	99.208	657.827	32.052	1.139	33.192	3.035	0.062	**694.116**
	$/L	8.61	3.98	7.32	12.11	4.33	11.41	7.67	8.59	**7.45**
United Kingdom	L	28.012	35.880	63.891	3.226	0.229	3.455	0.171		**67.518**
	NZ$	237.651	155.744	393.395	37.429	1.669	39.099	1.665		**434.160**
	$/L	8.48	4.34	6.16	11.60	7.28	11.32	9.74		**6.43**
Australia	L	19.085	34.067	53.152	3.480	0.120	3.600	0.645		**57.397**
	NZ$	152.270	156.194	308.465	48.817	0.876	49.693	7.724		**365.881**
	$/L	7.98	4.58	5.80	14.03	7.28	13.80	11.98	69.50	**6.37**
Canada	L	11.605	0.049	11.654	1.200		1.200	0.062		**12.917**
	NZ$	124.696	0.457	125.153	15.520		15.520	0.682		**141.355**
	$/L	10.74	9.33	10.74	12.93		12.93	10.94	62.00	**10.94**
China	L	1.667	0.005	1.672	0.931	0.007	0.938	0.002		**2.613**
	NZ$	19.444	0.055	19.499	16.714	0.191	16.905	0.020	0.001	**36.426**
	$/L	11.66	11.60	11.66	17.95	26.31	18.01	9.71	88.23	**13.94**
Germany	L	0.881	5.410	6.291	0.388	0.266	0.654	0.085		**7.030**
	NZ$	8.037	22.775	30.813	3.173	1.581	4.754	0.787		**36.354**
	$/L	9.12	4.21	4.90	8.19	5.95	7.27	$9.23		**5.17**
Ireland	L	2.600	0.755	3.355	0.182	0.003	0.185	0.030		**3.570**
	NZ$	23.395	6.947	30.342	2.235	0.040	2.276	0.385		**33.003**
	$/L	9.00	9.20	9.04	12.29	14.90	12.32	12.96		**9.25**
Netherlands	L	2.485	0.053	2.538	0.185	0.000	0.185	0.011		**2.734**
	NZ$	20.789	0.271	21.060	2.311	0.014	2.325	0.101		**23.485**
	$/L	8.37	5.09	8.30	12.51	32.63	12.56	9.36		**8.59**
Singapore	L	0.787	0.001	0.788	0.201	0.001	0.201	0.010	0.001	**1.001**
	NZ$	12.645	0.032	12.676	4.231	0.020	4.250	0.187	0.015	**17.129**
	$/L	16.07	21.47	16.08	21.09	23.51	21.10	18.22	10.34	**17.11**
Japan	L	0.808	0.144	0.952	0.307		0.307	0.047	0.017	**1.324**
	NZ$	8.134	0.780	8.914	5.138		5.138	0.510	0.392	**14.954**
	$/L	10.07	5.41	9.36	16.73	17.78	16.73	10.84	22.62	**11.30**
Hong Kong	L	0.794	0.019	0.813	0.141	0.001	0.142	0.013		**0.968**
	NZ$	10.930	0.167	11.097	3.091	0.177	3.268	0.218	0.003	**14.586**
	$/L	13.77	8.88	13.66	21.94	126.75	22.97	17.37	8.89	**15.07**
Denmark	L	0.799	0.863	1.662	0.126		0.126	0.001		**1.790**
	NZ$	6.212	4.415	10.627	1.533		1.533	0.016		**12.177**
	$/L	7.78	5.11	6.39	12.13		12.13	$12.47		**6.80**
Sweden	L	0.434	0.264	0.698	0.300	0.001	0.301	0.016		**1.015**
	NZ$	3.879	1.334	5.213	3.338	0.011	3.350	0.298		**8.861**
	$/L	8.93	5.06	7.47	11.14	12.71	11.14	18.69		**8.73**
Norway	L	0.360	0.358	0.718	0.148		0.148	0.010		**0.876**
	NZ$	2.612	1.796	4.408	1.281		1.281	0.104		**5.792**
	$/L	7.26	5.01	6.14	8.68		8.68	10.56		**6.62**
Finland	L	0.141	0.002	0.143	0.034		0.034	0.105		**0.283**
	NZ$	1.275	0.020	1.294	0.401		0.401	1.076		**2.771**
	$/L	9.02	9.81	9.03	11.86		11.86	10.21		**9.81**
Others	L	8.111	2.578	10.690	0.980	0.094	1.074	0.125	0.007	**11.896**
	NZ$	81.275	13.386	94.662	14.981	0.881	15.863	1.720	0.079	**112.323**
	$/L	10.02	5.19	8.86	15.28	9.40	14.77	13.79	10.70	**9.44**
Total	**L**	**143.457**	**105.401**	**248.858**	**14.475**	**0.986**	**15.461**	**1.728**	**0.034**	**266.081**
	NZ$	**1271.863**	**463.583**	**1735.446**	**192.245**	**6.601**	**198.846**	**18.528**	**0.552**	**1953.372**
	$/L	**8.87**	**4.40**	**6.97**	**13.28**	**6.69**	**12.86**	**10.72**	**16.38**	**7.34**

All litre and NZ$ figures are in millions
This data is subject to confirmation by Stats NZ

Source: Stats NZ

Statistics

New Zealand wine exports by variety (2013-2022)

Variety	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Sauvignon Blanc	144.551	160.58	177.776	181.944	217.89	220.065	231.194	249.445	242.876	228.479
Pinot Noir	10.17	10.705	10.886	12.171	12.51	13.171	12.331	10.282	10.868	10.469
Pinot Gris	3.612	4.688	4.479	4.713	7.151	7.74	8.678	9.207	10.671	8.953
Rosé	0.49	0.712	0.835	0.942	2.389	3.656	5.195	5.592	7.996	5.827
Chardonnay	4.914	4.627	5.277	6.063	6.172	4.766	5.088	4.649	4.914	4.883
Sparkling	1.451	1.7	1.441	1.412	1.088	1.167	1.15	1.366	3.272	2.216
Merlot	2.059	1.765	1.711	1.906	2.25	2.06	2.769	1.456	1.641	1.744
Riesling	0.924	0.996	0.113	0.15	1.099	0.962	1.047	1.184	1.089	0.898
Generic White	0.266	0.043	0.384	0.38	0.085	0.12	0.126	0.077	0.533	0.639
Cabernet or Merlot blend	1.424	1.03	0.754	0.836	0.972	0.798	0.81	0.436	0.453	0.378
Syrah	0.27	0.242	0.954	1.065	0.283	0.375	0.346	0.273	0.236	0.355
Other white varietals	0.103	0.127	0.282	0.341	0.453	0.42	0.235	0.254	0.217	0.278
Gewürztraminer	0.192	0.212	0.017	0.026	0.182	0.15	0.148	0.135	0.119	0.085
Other red varietals	0.085	0.068	0.041	0.048	0.128	0.064	0.085	0.047	0.074	0.066
Generic red	0.043	0.002	0.17	0.087	0.126	0.013	0.008	0.042	0.032	0.061
Sparkling Sauvignon	0.36	0.107	0.175	0.183	0.059	0.101	0.042	0.056	0.069	0.052
Cabernet Sauvignon	0.046	0.006	0.012	0.013	0.011	0.023	0.011	0.019	0.020	0.047
Sauvignon blend	0.422	0.034	0.014	0.013	0.135	0.102	0.018	0.009	0.013	0.027
Chardonnay blend	0.997	0.047	0.005	0.132	0.007	0.008	0.01	0.013	0.028	0.023
Chenin Blanc	0.016	0.017	0.041	0.028	0.008	0.009	0.011	0.01	0.016	0.019
Sweet wines	0.038	0.037	0.085	0.134	0.051	0.032	0.024	0.021	0.019	0.018
Fortified	0.001	0.004	0.002	0.011	0.001		0.002			0.001
Semillon	0.003	0.008	0.009		0.051					
Total*	**172.437**	**187.757**	**205.46**	**212.594**	**253.099**	**255.802**	**269.329**	**284.574**	**285.156**	**265.517**

*Data will slightly differ in total volume to those obtained through Stats NZ
Note: All figures are in millions of litres

Source: Wine Export Certification Service

Wine imports into New Zealand (2013-2022)

By country of origin	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Australia	32.565	31.958	25.668	28.715	28.517	31.527	32.118	29.795	27.427	33.566
France	2.023	2.153	2.344	2.869	2.807	2.762	3.069	2.807	3.475	4.154
Italy	0.865	0.940	1.023	1.308	1.381	1.786	1.870	2.362	2.539	3.148
Chile	1.936	2.457	1.905	1.842	2	1.606	1.522	1.943	2.166	0.825
South Africa	2.579	1.732	1.373	1.086	1.492	1.370	1.406	0.615	2.001	3.122
Argentina	0.112	0.161	0.229	0.212	0.223	0.265	0.917	2.084	1.001	0.353
Spain	0.430	0.518	0.641	0.578	0.716	0.557	0.654	0.955	0.692	0.807
Others	0.382	1.106	1.307	0.603	1.958	1.017	0.911	1.057	1.757	1.195
Total	**40.892**	**40.724**	**34.490**	**37.212**	**39.935**	**40.881**	**42.466**	**41.618**	**41.059**	**47.170**

By product type	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
White	16.760	17.280	11.217	14.088	18.206	21.525	21.237	20.603	18.935	21.255
Red	20.958	20.542	19.830	19.070	17.579	15.035	16.281	16.267	16.686	18.815
Sparkling	2.079	1.849	2.268	2.632	2.651	2.904	3.317	3.415	3.839	5.188
Champagne	0.884	0.896	1.049	1.364	1.397	1.371	1.567	1.288	1.544	1.858
Fortified	0.211	0.158	0.126	0.036	0.076	0.044	0.064	0.045	0.054	0.054
Total	**40.892**	**40.724**	**34.490**	**37.190**	**39.909**	**40.879**	**42.466**	**41.618**	**41.059**	**47.170**

Country of origin		White	Red	Sparkling	Champagne	Fortified	Total
Australia	NZ$	36.417	77.047	16.749		1.163	131.375
	L	17.317	13.634	2.592		0.023	33.566
France	NZ$	4.762	22.570	1.278	59.534	0.133	88.277
	L	0.272	1.864	0.159	1.858	0.001	4.154
Italy	NZ$	1.962	7.733	15.092		0.081	24.868
	L	0.216	0.975	1.956		0.002	3.148
Spain	NZ$	0.560	4.340	0.646		0.409	5.955
	L	0.059	0.645	0.097		0.005	0.807
South Africa	NZ$	3.684	1.359	0.068		0.017	5.129
	L	2.507	0.606	0.008			3.122
Chile	NZ$	0.599	1.867	0.006			2.472
	L	0.328	0.496	0.001			0.825
Argentina	NZ$	0.100	1.979	0.035			2.113
	L	0.030	0.321	0.002			0.353
Others	NZ$	5.063	2.511	3.399		1.975	12.948
	L	0.526	0.274	0.373		0.022	1.195
Total	**NZ$**	**53.146**	**119.405**	**37.273**	**59.534**	**3.778**	**273.137**
	L	**21.255**	**18.815**	**5.188**	**1.858**	**0.054**	**47.170**

All litre and NZ$ figures are in millions

Source: Wine Export Certification Service

Directory

BOARD MEMBERS

New Zealand Winegrowers

Clive Jones *(Chair)*
Nautilus Estate

Fabian Yukich *(Deputy Chair)*
Trinity Hill

Duncan McFarlane
Indevin Group Ltd

John Ballingall
Sense Partners

Simon Towns
Constellation Brands

Tim Nowell-Usticke
Mount Riley

Kevin Mapson
Pernod Ricard New Zealand

Misha Wilkinson
Misha's Vineyard

Emma Taylor
Te Awanga Estate

Melissa Tripe
JTC Viticulture

Michael Henley MW
Aotearoa New Zealand
Fine Wine Estates

Tim Rose
Rose Ag Ltd

For a full list of the Roll of Fellows for New Zealand Winegrowers and Wine Institute of New Zealand, and the Roll of Honourary Life Members, please visit **nzwine.com/our-people**

REGIONAL WINEGROWING ASSOCIATIONS

Hawke's Bay Winegrowers Inc

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

Brent Linn *(Executive Officer)*
wine@wairiki.co.nz

Peter Hurlstone *(Regional Representative)*
peter.hurlstone@pernod-ricard.com

hawkesbaywine.co.nz

Marlborough Winegrowers Association Inc & Wine Marlborough Ltd

Marcus Pickens *(General Manager)*
marcus@winemarlborough.nz

marlboroughwinenz.com

Nelson Winegrowers Association Inc & Wine Nelson

Paul Miles *(Chair)*
paul.miles@riwakariverestate.com

tastenelsonwines.nz/nelson-wine-growers-association

Wairarapa Winegrowers Association

Jannine Rickards *(Joint Chair)*
jannine rickards@gmail.com

David Igguldan *(Joint Chair)*
hamdenestate@gmail.com

Carla Steed *(Marketing)*
marketing@wairarapawine.co.nz

wairarapawine.co.nz

North Canterbury Winegrowers

Mike Saunders *(Chair)*
mike.saunders@greystonewines.co.nz

Matt Barbour *(Deputy Chair)*
mattbabour77@hotmail.com

northcanterburywines.co.nz

Central Otago Winegrowers Association

Anne Pullar *(Chair)*
chair@cowa.org.nz

Jake Tipler *(General Manager)*
jake@cowa.org.nz

Natalie Wilson *(Membership & Communications)*
info@cowa.org.nz

centralotagowine.co

Gisborne Winegrowers Society Inc

Mark Thompson *(Chair)*
mark@gisvin.co.nz

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

gisbornewine.co.nz

Northern Winegrowers & Grapevine Improvement Association Inc

Peter Jones
peter.jones@thelandingnz.com

SUB-REGION WINEGROWING ASSOCIATIONS

Waiheke Winegrowers Association

Barnett Bond *(Acting Chair)*
barnettbond9@live.com,
president@waihekewine.co.nz

Daniela De Bruyn *(Communications Manager)*
daniela@waihekewine.co.nz

Matakana Winegrowers Inc

Hegman Foster *(President)*
matakanawinegrowers@gmail.com

matakanawine.co.nz

Northland Winegrowers Association

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

northlandwinegrowers.co.nz

West Auckland Winegrowers

Michael Brajkovich MW
michael@kumeuriver.co.nz

Waitaki Valley Winegrowers Association

Dave Sutton *(Chair)*
dave@tekanoestate.com

Key Contacts

Chief Executive Officer

Philip Gregan
+64 21 964 564
philip@nzwine.com

General Manager Advocacy & General Counsel

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

General Manager Marketing

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

General Manager Sustainability

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

Communications Manager

Amber Silvester
+64 21 794 381
amber.silvester@nzwine.com

External Relations Manager

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

Financial Accountant

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

CEO — Bragato Research Institute

Jeffrey Clarke
+64 21 477 428
jeffrey.clarke@bri.co.nz

NEW ZEALAND WINEGROWERS INC

PO Box 90276
Victoria Street West
Auckland 1142

Level 4
5-7 Kingdon Street
Newmarket
Auckland 1023

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

Manaaki Whenua

Manaaki Tangata

Haere Whakamua

**If we take care
of the earth,**

**and take care
of the people,**

**we will take care
of the future.**

GREYSTONE WINES, NORTH CANTERBURY

NEW ZEALAND WINE
PURE DISCOVERY