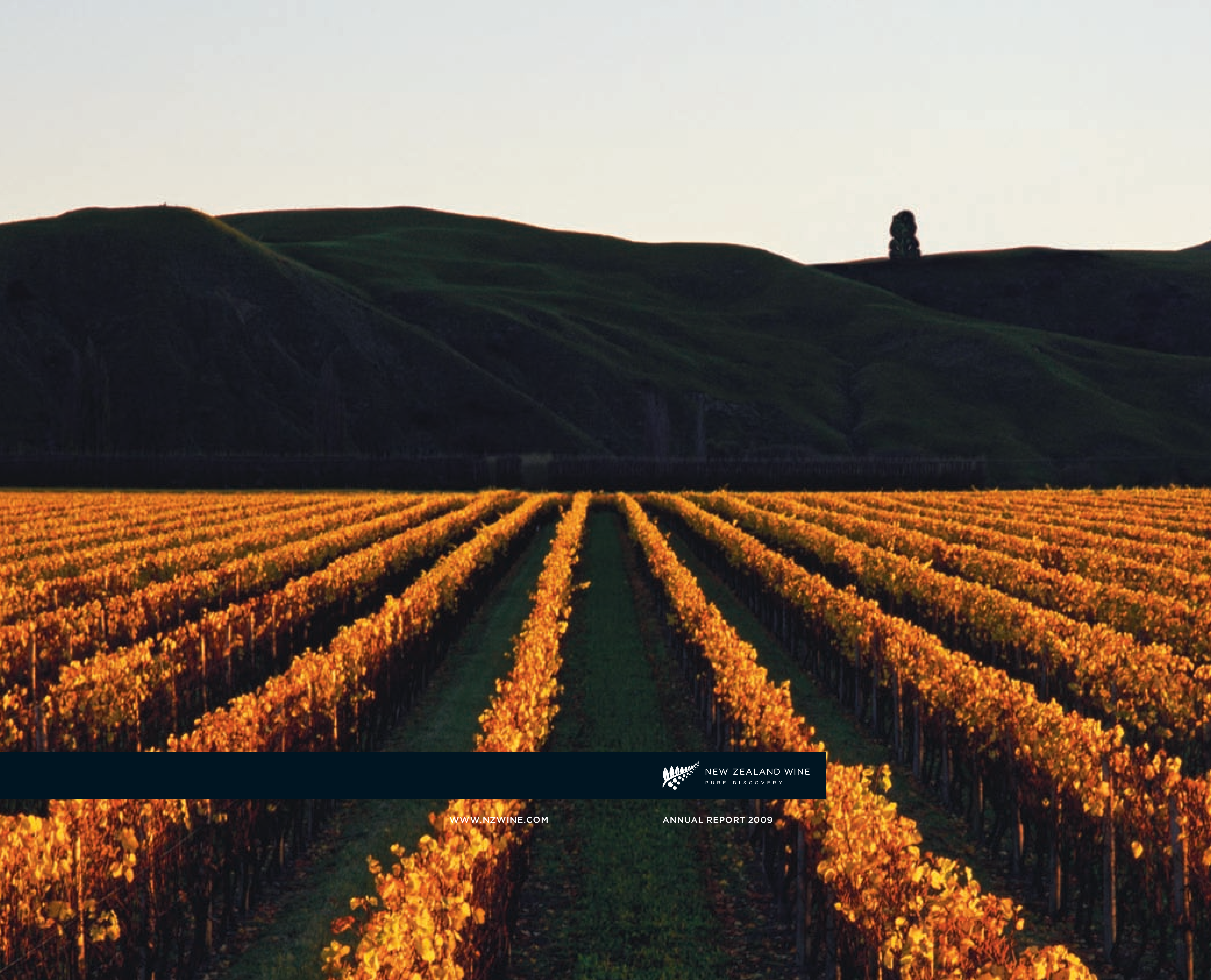


NEW ZEALAND WINE
PURE DISCOVERY

WWW.NZWINE.COM

ANNUAL REPORT 2009

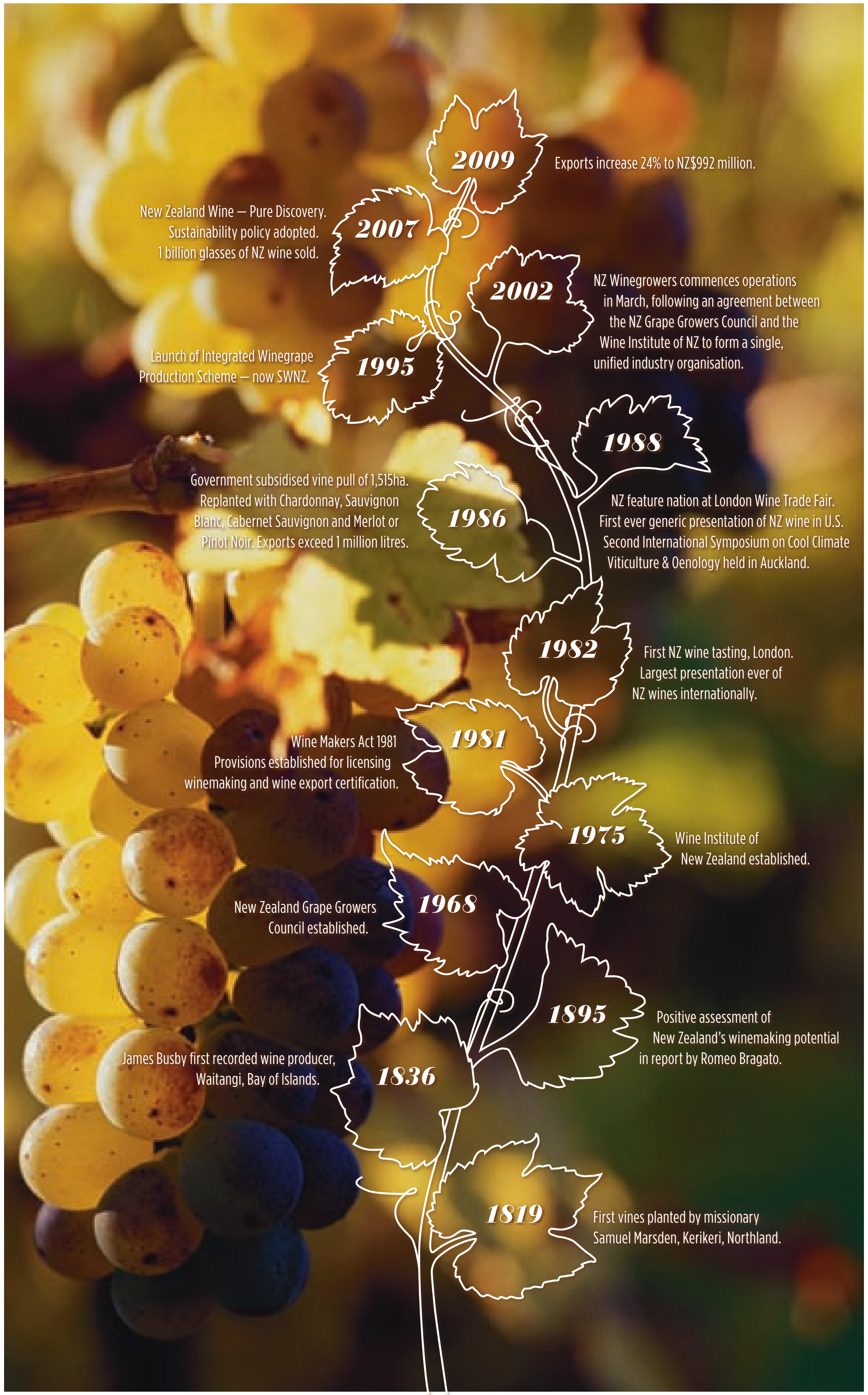
TO CONTINUE TO SUCCEED, NEW ZEALAND BRANDS MUST ALWAYS OVER-DELIVER IN TERMS OF

reputation, quality and value

THAT IS HOW WE HAVE GROWN EXPORTS TO NEARLY ONE BILLION DOLLARS — IT IS ALSO THE

key to the future

STUART SMITH **CHAIR, NEW ZEALAND WINEGROWERS**


2009
Exports increase 24% to NZ$992 million.
2007
New Zealand Wine — Pure Discovery.
Sustainability policy adopted.
1 billion glasses of NZ wine sold.
2002
NZ Winegrowers commences operations in March, following an agreement between the NZ Grape Growers Council and the Wine Institute of NZ to form a single, unified industry organisation.
1995
Launch of Integrated Winegrape Production Scheme — now SWNZ.
1988
NZ feature nation at London Wine Trade Fair.
First ever generic presentation of NZ wine in U.S.
Second International Symposium on Cool Climate Viticulture & Oenology held in Auckland.
1986
Government subsidised vine pull of 1,515ha.
Replanted with Chardonnay, Sauvignon Blanc, Cabernet Sauvignon and Merlot or Pinot Noir. Exports exceed 1 million litres.
1982
First NZ wine tasting, London.
Largest presentation ever of NZ wines internationally.
1981
Wine Makers Act 1981
Provisions established for licensing winemaking and wine export certification.
1975
Wine Institute of New Zealand established.
1968
New Zealand Grape Growers Council established.
1895
Positive assessment of New Zealand's winemaking potential in report by Romeo Bragato.
1836
James Busby first recorded wine producer, Waitangi, Bay of Islands.
1819
First vines planted by missionary Samuel Marsden, Kerikeri, Northland.

CONTENTS

CHAIR'S REPORT

In the very near future New Zealand wine will achieve an important landmark — annual exports of more than $1 billion. That will be one year ahead of schedule, a stunning achievement for an industry that exported only a little more than $100 million of wine a decade ago.

That success has been driven by the decisions, the commitment and the investments of our grape growers and wineries. Together they have built New Zealand wine into a globally successful brand.

Events in the past year, however, show that the industry is now in a new phase in its evolution. Following the larger than expected 2008 vintage, bulk wine exports lifted sharply provoking concern in the industry. For vintage 2009, growers and wineries worked hard to manage the grape intake down to levels in line with market demand, while recent weeks have seen the cancellation of some grape supply contracts and vineyards being pulled out. Tough times for our growers and wineries, made even more difficult by the impact of the global recession.

Changes and challenges have been faced by our industry before. On each occasion we have emerged stronger by lifting our commitment to high quality, market led brands.

The call to action today is no different. A single-minded focus on maintaining the premium positioning of the New Zealand wine brand must drive every decision taken by our growers and wineries. Consumers must be offered an outstanding wine experience and the supply demand equation must be managed effectively.

That is the key to the next billion dollars of profitable exports.

THE YEAR IN REVIEW

THE YEAR IN SALES

In the past 12 months exports leapt 27% in volume to reach 113 million litres. Export value rose 24% to $992 million. The dramatic increases reflect the fact that, for the first time in recent history, the industry had sufficient inventory to supply our international markets.

With supplies of Sauvignon Blanc available following the 2008 vintage, exports of this varietal increased 37% in the past year. This significant growth, despite the prevailing global economic recession, is testimony to our strong global reputation with this style and the consequent strong demand.

Exports of other wine styles increased just 3% in volume in the past year. However this obscures the continuing success of Pinot Noir, with exports up 8% in volume, and the surge in demand for Pinot Gris, up 62% on last year. On the downside Chardonnay exports fell 13% for the June year end and Riesling was down 22%.

New Zealand wine continued to out-perform in key markets. Shipments to the UK were up 22%. In that market New Zealand wine is now the second largest category in the £8 - £9 price bracket, with a market share of more than 20%.

Exports to Australia, driven by strong demand, lifted 51% in the past year. This continues our very strong performance in this market, which has seen exports volumes to Australia lift more than tenfold since 2002.

Shipments of wine to the USA grew 18% this year. Performance in the 2nd half of the year was much improved, helped by the New Zealand dollar retreating from the very high levels of 2008.

As with exports, domestic sales volumes benefited from increased supplies from vintage 2008. Estimated sales of New Zealand wine in our home market were 60 million litres, up 29% on the previous year.

While there are clearly many positives in the achievements of the industry in the past year, some unmistakable warning signs also emerged. Despite exports and domestic sales volumes benefiting from increased supplies from vintage 2008, those increased supplies also delivered increased competition and downward price pressure. This situation was exacerbated by the global recession.

In addition, the fallout from vintage 2008 saw one other significant trend emerge — a surge in bulk wine exports.

Historically, bulk wine exports have accounted for less than 5% of total export volume; in the past year this quadrupled to nearly 20%. While bulk exports may relieve pressure on wineries in the short term, in the longer term they may significantly impact our market positioning and the reputation of New Zealand wine and our brands. As such they need to be managed very carefully.

These market developments mean that more than ever this year, industry attention has been centred on the profitability of grape growing and winemaking. Grape prices have fallen as a result of increased supplies, while wineries have had to focus to maintain margins. In the UK and New Zealand the pressure on winery margins has been further increased by significant increases in the tax on wine in those markets. Lower profits are the reality for many in our industry this year.

VINTAGE 2009

Natural conditions were bountiful in 2009, and with 2,000 more hectares coming on stream, there was potential for production levels to spike to as much as 400,000 tonnes of grapes. The difficulties this would have presented to the industry were identified early. Growers and wineries worked together to bring the crop back into line with market demand. As a result of this industry-wide effort the vintage came in at 285,000 tonnes — the same level as last year. Average yield was 9.2 tonnes per hectare — down from 9.7 tonnes per hectare in 2008. This disciplined industry approach to yield management, combined with a prolonged ripening period to produce a vintage that is shaping up to be one of the finest for some time.

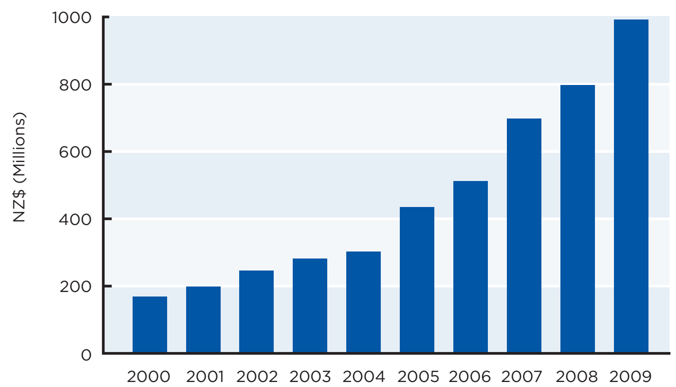
Marlborough Sauvignon Blanc accounted for 57% of the vintage with 161,000 tonnes harvested. This was just 5% higher than the previous year, despite the producing area of Sauvignon Blanc vineyards lifting substantially. This result illustrates the great restraint exercised by the industry in the region in 2009. Overall, in 2009 Marlborough's total grape intake fell 1%.

Production of Pinot Noir, our second most widely planted variety, fell 16% to 27,000 tonnes reflecting lower yields, notably in Marlborough and Central Otago.

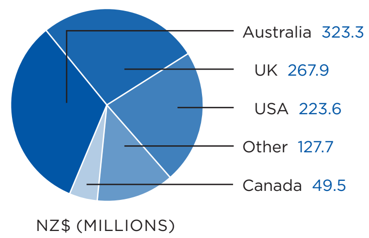
Hawkes Bay by contrast lifted production 20% as the region returned to full bearing after the frost-reduced 2008 vintage. As a consequence, volumes of Chardonnay, Merlot and Cabernet Sauvignon all increased. Yield restrictions limited the Gisborne vintage, while among the boutique regions Wairarapa and Nelson enjoyed record harvests.

Overall the 2009 vintage represents a good result for the industry in terms of quality and quantity. It is significant also in that it showed how quickly the industry could respond to market place signals when they were clear and unequivocal. This does not mean that the industry can afford to relax the discipline it imposed upon itself this year. On the contrary, 2009 should be seen as the first year of a new reality.

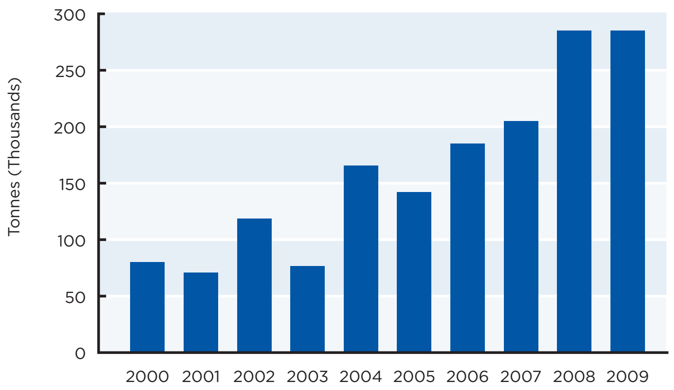
WINE EXPORTS BY VALUE



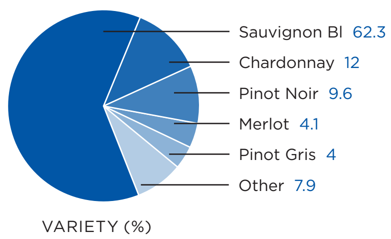
2009 MAJOR EXPORT MARKETS BY VALUE



VINTAGE 2009 (BY TONNES)



VINTAGE 2009 (BY VARIETY)



THE NEW REALITY

"The …industry is emerging from a period when the major challenge was to produce enough wine to meet the world demand, to one where the major challenge will be to sell the available wine in an increasingly competitive world market."

These words were written about another wine industry just a decade ago. They could easily have been written about our own industry today.

To meet this challenge, both demand and supply-side initiatives are necessary. Marketing is more important to us than ever before. Equally, effective management of supply is fundamental. The New Zealand wine industry does not have a "wine lake"; that is not something that happens with one or two large harvests. However, the signs for the industry are clear and unmistakable.

NEW ZEALAND WINEGROWERS' ACTIVITIES

Against this background, New Zealand Winegrowers has carried out a host of activities to promote the interests of the grape and wine industry. Core functions lie in the areas of information, marketing, research and regulatory affairs. All this work is directed towards achieving our mission of building a great New Zealand wine industry.

DIRECTING AND INFORMING INDUSTRY

This year more than any other, New Zealand Winegrowers has been called upon to provide strategic direction and information to the industry. In June 2009 in a series of seminal meetings throughout the country, we provided a detailed analysis of production, sales and recent developments in the industry. These meetings were attended by close to 1,000 industry members. We have also provided valuable technical information to growers and wineries on available options to target their production and intake to market demand.

Contact has been maintained with key Ministers and Government agencies, including the Inland Revenue Department and the Ministry of Agriculture and Forestry. Other stakeholders such as the banking and accounting sectors have been regularly updated as well.

Discussion at these levels was greatly assisted by the NZIER report on the economic impact of the New Zealand wine industry that we commissioned. This report allowed us to put some firm numbers around the major boost that wine provides to the economy. According to the report, wine adds $1.28 billion to New Zealand's GDP and $3.5 billion to our country's gross output each year. This is not to mention the enormous benefit to New Zealand from having 150 million bottles on dining room and restaurant tables around the world, each proudly bearing the words "New Zealand".

All these activities were in addition to 'business as usual'; arming growers and wineries with the right data and opportunities to grow successfully. These include grape price data, the Statistical Annual, various legal guides and codes of practice, export and domestic sales reports, the Bragato Conference, First Steps to Exporting, and the Annual Seminar Series to mention some of the highlights.

PROTECTING AND PROMOTING OUR BRAND

"New Zealand wine" is the brand that unites our industry. Protecting and promoting that brand is essential for each individual grower and winery and for the industry as a whole through the national organisation. That is why the Generic Marketing Programme, supported by individual wineries and regions as well as New Zealand Winegrowers, is so important.

A two-pronged strategy underpins the marketing programme. First, deepen penetration of existing markets, starting with the top three: UK, Australia and USA. Second, work our way into new markets in Asia and Europe.

Throughout this report there are press quotes that speak to both the quality of New Zealand wine and the success of the marketing that supports the brand. Restaurant promotions; promotions in independent retailers, supermarket chains and monopolies; targeting key influencers such as sommeliers; consumer events; these are just a sample of the many activities undertaken in 2009 in conjunction with 291 exporting wineries.

PRACTICAL SCIENCE

Results that can be used in the vineyard or winery; that is the aim of New Zealand Winegrowers' Research Programme.

Two major projects: the Sauvignon Blanc Flavour and Aroma project; and the Designer Vines project focussing on Pinot Noir — have made a major contribution to understanding and applying the components of wine quality in New Zealand. Vineyard longevity is another core focus for the research programme. This has been given a major boost with a $500,000 Government grant to progress elimination of grape vine leaf roll virus that threatens the long-term viability of many vineyards.

There are a wide range of other projects supported by the NZW Research Programme, and great efforts are made to make the results available to industry through channels such as the Bragato Conference, the science supplement in the New Zealand Winegrower magazine, reports on the www.nzwine.com website, regional conferences and seminars.

NEGOTIATING REGULATORY OBSTACLES

New Zealand Winegrowers works to promote a regulatory environment for growers and wineries free from undue interference and unnecessary cost. Industry interests and perspectives are represented at all levels from local councils to national government, to international organisations such as the World Wine Trade Group, the OIV and the WTO.

A Parliamentary election, the global financial crisis and the EU wine reform have provided the major themes for this year's regulatory activities. We have sought to build a sound understanding of the industry and its regulatory issues with the new Government. Given the current economic situation, the continuation of funding for export certification and the alignment of the ALAC levy with the excise system can be counted as strong positives.

Internationally, we have progressed collective efforts to develop a consistent methodology for measuring greenhouse gas emissions in the wine industry, made strong and effective representations on the new EU wine rules and secured a key role for New Zealand in the OIV.

An enormous amount of time and energy has been spent on addressing RMA matters. The use of frost fans is an issue that has come up for consideration in many regions. We have sought to promote an approach that is consistent, fair and that recognises the critical role these machine play in our vineyards.

Of course, there remain a number of outstanding regulatory issues. Excise is an ongoing drain on profitability, while the impacts of a highly variable exchange rate make financial planning difficult for export businesses. The fate of the RMA and rules around water management and use will affect everyone in the industry, as will new rules for wine export certification.

SUSTAINING MOMENTUM

Genuine commitment to sustainability has been a guiding principle for the New Zealand wine industry for many years. From its beginnings as the Integrated Winegrape Production system in 1994, Sustainable Winegrowing New Zealand (SWNZ) has evolved to become a world-leading programme with 85% of total production capacity now within the scheme — well on the way to the goal of 100% by 2012.

SWNZ has had a big year with a very large number of new members coming on board. The introduction of new scorecards and the roll-out of a new web interface have improved both the content and workability of the programme. These developments have been complemented by the development of new tools to benchmark water and energy use and waste management, and a major project to move the industry towards nil residue production.

Organic winegrowing has also moved forward with the creation of Organic Winegrowing New Zealand and a very successful conference with more than 200 winery and grower attendees.

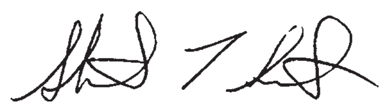
THE TOUGH GET GOING…

For many in the industry the going was tough this past year, and it may well yet get tougher.

Managing a supply-demand imbalance in the long-term interests of the industry will inevitably involve short term pain. And even the most determined optimist would concede that the global economy is still some way from full recovery.

But New Zealand wine remains a strong proposition. Our reputation is positive and we have carved a niche in the global market. Sales continue to build. Quality from 2009 will be very high across a range of styles. We have an industry that is united and understands the challenges and opportunities it faces.

Capitalising on those strengths requires hard work, sacrifice and, above all, investment in our national, regional and individual brands. In good times and bad, brands are the reasons we give consumers to choose our products. To continue to succeed New Zealand brands must always over-deliver in terms of reputation, quality and value. That is how we have grown to exports to nearly $1 billion – it is also the key to the future.



STUART SMITH **CHAIR**

STEVEN GREEN **DEPUTY CHAIR**

REGULATION REPORT

REGULATORY AFFAIRS AND TRADE

A STRONG INDUSTRY VOICE

New Zealand Winegrowers provides a single strong voice for industry across a range of regulatory issues. Our mandate is to promote a regulatory environment that facilitates New Zealand wine businesses. With a new Government and a range of new and ongoing regulatory initiatives, it has been a busy year.

- A comprehensive briefing was prepared for the incoming Government, and key Ministers have been briefed on issues affecting the wine industry.
- The Wine Act came into full operation on 1 December 2008, with 100% of registering wineries adopting the Wine Standards Management Plan template developed by New Zealand Winegrowers.
- Submissions were prepared on a wide range of legislation including RMA reform, Sale of Liquor Act reform and allergen labelling.
- Successful outcomes were achieved on proposed District and Regional Plans in Auckland, Wairarapa, Hawkes Bay and Marlborough to protect the industry's ability to operate responsibly.
- Continued Government funding was secured for the Wine Export Certification Service.
- Through collaboration with Government and the horticulture industry, improvements to the RSE scheme were introduced as well as the new Supplementary Seasonal Employment policy.
- The ALAC levy rate was reduced to bring it into line with excise.
- The Geographical Indications Summit progressed key framework issues for industry heading into a new legislative regime.

INTERNATIONAL MEETINGS 2008-09

5-7 MARCH 2009
International Wine and Spirits Federation (FIVS) Spring Congress, Paris

9-10 MARCH 2009
World Wine Trade Group Inter-Sessional Meeting, Brussels

11-20 MARCH 2009
International Wine and Vine Organisation (OIV) Expert Group Meetings, Paris

26 JUNE 2009
FIVS Board Meeting, Zagreb

29 JUNE-3 JULY 2009
32nd World Vine and Wine Congress and 7th OIV General Assembly, Zagreb

PROTECTING TRADE INTERESTS

Trade policy is a largely unseen but vitally important part of our work programme. Small changes in foreign market rules can rapidly make New Zealand wine exports uncompetitive. We work closely with Government to progress a global free trade environment, and within international organisations and alliances to build intelligence and influence that will benefit New Zealand wine exporters. Among this year's activities:

- NZW Manager Policy & Membership, John Barker, was elected President of the International Vine and Wine Organisation's Law and Economy Commission.
- Submissions were made through the World Trade Organisation on the EU's proposed new winemaking and labelling rules.
- The World Wine Trade Group met in Brussels to progress discussions on improvements to labelling and certification rules.
- New Zealand participated in international efforts to bring a science-based approach to the issue of allergens in wine.
- International and local consultation was held on the World Health Organisation's strategy to deal with the harmful use of alcoholic beverages.
- The Free Trade Agreement with China came into effect and New Zealand Winegrowers was authorised to issue the certificates of origin needed to gain tariff reductions.
- Discussions to create an internationally recognised methodology for measuring greenhouse gas emissions were progressed in both the International Wine and Vine Organisation and the International Wine and Spirits Federation.

SUBMISSIONS 2008-09

NZW made either direct formal submissions or supported regional submissions in relation to the following matters:

- Public Health Bill (July 2008)
- National Environmental Standard on Ecological Flows and Water Levels (August 2008)
- Proposed Hauraki Gulf Islands Section of the Auckland City District Plan (September 2008)
- World Health Organisation's Roundtable for Economic Operators (October 2008)
- Hastings District Council Plan Change 49 — Subdivision in the Rural Zone (ongoing)
- Auckland Regional Plan: Air, Land & Water (ongoing)
- Wairarapa Combined Plans (ongoing)
- Review of Tertiary Education and Training Provision for Land-Based Industries (November 2008)
- National Alcohol Action Plan (November 2008)
- Trans-Pacific Strategic Economic Partnership (December 2008)
- OIV Proposed Draft Resolutions (December 2008 & May 2009)
- Technical Advisory Group on Reform of the Resource Management Act 1991 (January 2009)
- NZ — Korea FTA (February 2009)
- Proposed Freshwater National Policy Statement (February 2009)
- Hurunui District Council Plan Change 18 — Frost Control Fans (March 2009)
- World Health Organisation's discussion paper "Towards a Global Strategy to Reduce Harmful Use of Alcohol" (March 2009)
- Immigration Skill Shortage List Review (March 2009)
- Liquor Promotions Code (March 2009)
- NZFSA Review of Export Laboratory Analysis Services (ongoing)
- Marlborough District Council Report on Use of Wind Machines for Frost Protection (March 2009)
- NZFSA Review of EU Overseas Market Access Requirements (ongoing)
- Resource Management (Simplifying and Streamlining) Amendment Bill (April 2009)
- NZFSA Fees and Charges for Approvals and Related Functions Discussion Paper (April 2009)
- Sale and Supply of Liquor and Liquor Enforcement Bill (May 2009)
- NZ - India FTA (May 2009)
- Waste Management Discussion Paper (May 2009)
- Greater Wellington Regional Policy Statement (June 2009)
- Biosecurity New Zealand's Joint Decision Making and Cost Sharing Discussion Paper (June 2009)

MARKETING BRAND NEW ZEALAND WINE

NEW ZEALAND WINE — PURE DISCOVERY

New Zealand is a land like no other. New Zealand wine is an experience like no other. Our special combination of soil, climate and water, our innovative pioneering spirit and our commitment to quality all come together to deliver pure, intense and diverse experiences. In every glass of New Zealand Wine is a world of pure discovery.

VISION

- To be internationally recognised as the leading producer and marketer of highly distinctive premium quality wines

MISSION

- To promote New Zealand Wine generically, by providing a platform for individual brand promotion
- To provide a strong, unified and differentiated positioning for New Zealand Wine

OBJECTIVES

- To raise awareness of and build brand preference for New Zealand Wine in international and domestic markets
- To create a platform for New Zealand Wine export sales of NZ$1.5 billion at profitable prices
- To create a platform for New Zealand Wine domestic sales of NZ$0.5 billion at profitable prices

GLOBAL MARKETING STRATEGY

Deepen penetration of existing markets

- Focus on those markets we can make the most impact in
  — Top 3: UK, USA and Australia
  — Next tier: Canada, Ireland, Japan
- Carry out market specific promotions, recognising New Zealand wine is at different points in our key markets
- Carry out channel specific promotions, supporting restaurants, independent retailers and multiple retailers to meet the requirements of small, medium and large wineries
- Leverage key blue chip events (e.g. London, Sydney, Melbourne, Tokyo) and work with partners (e.g. Air NZ, NZTE, Tourism NZ, Food companies) to make them a full NZ experience
- Continually strive to bring an innovative approach to our marketing programme

Open new markets

- Develop new markets: in Asia, mainland Europe and outer regions in existing markets

External and internal communication

- Continued roll-out of the New Zealand Wine — Pure Discovery brand across all touch points
- Build and refine trade/media database and gather and utilise consumer data
- Hand-sell the New Zealand Wine generic marketing programme to wineries and agents/distributors
- Take leadership with regions: to enable them to best leverage the New Zealand Wine generic marketing programme

HIGHLIGHTS

In 2008/2009 the vast majority of exporting wineries participated in the New Zealand Wine generic marketing programme and contributed to a global campaign in excess of NZ$5 million.

A record 291 wineries took part in events or generic marketing organized by NZ Winegrowers.

New Zealand Winegrowers' generic marketing programme consists of:

- International media and wine buyer visits
- Seminars
- NZ Wine Promotions
- NZ Wine Events

INTERNATIONAL MEDIA AND WINE BUYER VISITS

2008/9 saw a comprehensive programme of visits for international guests organised by New Zealand Winegrowers, with 24 visitors conducting 384 visits to wineries or regional bodies.
The aim of the visit programme is to create long-term supporters who will continue to generate positive media coverage/place listings of New Zealand wine in the years subsequent to their memorable experience in the country.

INBOUND VISITS:
CANADA 1
KOREA 1
SWEDEN 1
HONG KONG 2
AUSTRALIA 3
USA 7
UK 9

SEMINARS

During the past year 25 generic seminars were conducted in 23 cities across 11 countries to highly targeted audiences (primarily trade and media), with the aim of heightening education levels and generating interest on specific themes. The wines shown in the seminars were selected through two blind tastings (September and February) into which all New Zealand wineries were invited to submit wines.

- Coming of Age of NZ Reds
- Sensational Syrah and other Hot Reds from NZ
- Rise of Reds (inc. Pinot Noir)
- Awesome Aromatics
- Gewürztraminer — Taming the Wild One
- Regional Tour of New Zealand Pinot Noir
- Regional Character of New Zealand Riesling and Pinot Noir
- New Zealand Sauvignon Blanc — Expression of Pure Terroir
- New Zealand Sauvignon Blanc — where to from here?
- New Zealand's Next Wave/ Sauvignon Blanc and beyond
- New Zealand Wine — 100% Sustainable by 2012
- 2007 — New Zealand's Best Reds Vintage yet?

NZ WINE PROMOTIONS

RESTAURANT PROMOTIONS

UK
NEW ZEALAND WINES TO DINE FOR, LONDON

Working with media partner Square Meal, NZW launched a successful restaurant promotion in 2009 involving over 20 top London restaurants who committed to staff education and broadened listings.

USA
NEW ZEALAND WINES TO DINE FOR, CHICAGO

During May NZW ran a restaurant promotion in Chicago with 21 key restaurants. The promotion was effective in encouraging trial and driving NZ wine sales. New placements and staff training were achieved as a result of this promotion.

JAPAN
NEW ZEALAND IN A GLASS PROMOTION, NATIONWIDE

This month-long promotion saw 45 top restaurants in Japan offering at least 3 New Zealand wines by the glass. Japanese consumers tried new NZ wines and restaurants had the opportunity to expand their wine list and increase sales.

RETAIL PROMOTIONS

UK & IRELAND
INDEPENDENT WINE MERCHANT INITIATIVE, NATIONWIDE

This long-standing initiative is a darling of the independent trade with strong commercial benefits seen by participating retailers and wineries. It also attracts good media coverage and continued consumer support for New Zealand Wine.

USA
VINO100 PROMOTION, NATIONWIDE

The Vino100 retail promotion ran across 47 stores in 18 states during April/May 2009. The promotion included NZ Wine point of sale, staff training, in-store tastings and dinners. Increased consumer awareness and trial of NZ Wine resulted, as well as better knowledge of NZ Wine by Vino100 staff and new and repeat listings.

CANADA
SAQ IN-STORE PROMOTION & CELLIER FEATURE, QUEBEC

A New Zealand Wine promotion took place in 84 SAQ Sélection stores to build awareness and brand recognition in the Quebec market. This promotion coincided with a NZ feature in Cellier Magazine. The promotion included advertising, end aisle displays and in-store tastings.

OTHER PROMOTIONS

UK & IRELAND
CONSUMER FAIRS, NATIONWIDE

NZW's involvement in Taste of Dublin, The Wine Show, The Daily Telegraph consumer tasting and Threshers' Wine Fairs extended the reach and reinforced the NZ Wine brand positioning with consumers.

AUSTRALIA
SOMMELIER SESSIONS, NATIONWIDE

The 'a-list' trade are notoriously hard to engage, so we looked to Nick Stock; respected wine writer, for advice. Together we built an attractive platform for top sommeliers which included blind tastings and international benchmarking. Cellarhand Director, Patrick Walsh remarked 'It's amazing to see all this group here together.'

JAPAN
JAPANESE CUISINE AND NEW ZEALAND WINE BROCHURE

This handy-sized, bilingual brochure written by Lisa Perrotti-Brown MW, profiles ten typical Japanese dishes and a range of NZ varietals that perfectly match them. Including stunning photography and short, wine matching suggestions, the brochure will enhance the dining experience of Japanese food and NZ wine lovers not just in Japan, but all over the world.

> "We only occasionally carry NZ wines so the fact that we had several available for an entire month (for NZ Wines to Dine For, Chicago), with our wait staff engaged in the promotion, did result in a tangible increase in NZ wine sales."
>
> **BARRINGTON BISTRO, CHICAGO**


EUROPE Seminar


AUSTRALIA Seminar


ASIA Seminar


JAPAN
New Zealand in a Glass promotion


CANADA
SAQ In-Store Promotion & Cellier Feature


UK & IRELAND
Consumer Fairs

NZ WINE EVENTS

New Zealand Winegrowers runs a number of different types of events around the world.
In newer cities the focus is on targeting the key wine trade and media to attend.
In established cities this is augmented by consumer evenings.
Different formats are used to ensure maximum participation.

KEY	EVENTS	COUNTRIES	ATTENDANCE
	25 Seminars	11	1000 Trade/Media (estimate)
	13 New Releases	5	987 Trade/Media
	6 Showcases	3	516 Trade/Media
	20 Wine Fairs	9	5,664 Trade/Media/4508 Consumers
	14 Key Events	3	97,919 Trade/Media/Consumers
	9 Other Events	2	4,510 Trade/Media/Consumers


AUSTRALIA Wine Fair


JAPAN Showcase


UK Wine Fair


CANADA Wine Fair


EUROPE Wine Fair


USA New Release

SUSTAINABILITY REPORT

As significant land users across many regions the industry has had a long commitment to sustainable production in its widest sense.

This focus has served the industry well as our markets have become more sophisticated in their requirements for proof of our environmental credentials.

In 2007 New Zealand Winegrowers (NZW) set an industry-wide goal to have 100% of industry members operating under approved independently audited sustainability schemes by 2012. Given participation levels in such schemes at the time, this goal was aspirational but indicated the importance of building on our already well established reputation for sustainable production.

Since the announcement of this policy there has been a significant increase in activity around this area including the implementation of sustainability awards in our wine competitions and a reported increase in interest in organic production. Most notably there has been a very large increase in industry participation in Sustainable Winegrowing New Zealand (SWNZ). Vineyard numbers have increased by 162% and wineries by 96%. Currently 85% of the producing vineyard area is processed by member wineries, and the SWNZ programme is well on-track to helping achieve the 100% sustainable production target over the next three years.

"What's emerging is a new breed of Sauvignon; the 'classic' New Zealand Sauvignon Blanc can no longer be thought of as just one style, but many."

PATRICK COMISKEY **WWW.WINEREVIEWONLINE.COM, USA FEBRUARY 2009**

2008/2009 KEY INITIATIVES

NEW SCORECARDS

A key development in 2009 has been the introduction of new SWNZ Scorecards, the primary tool for measurement and benchmarking for the industry. The revised Scorecards (using the Muddyboots Software System), were released to the industry in April, for reporting for the 2008/2009 vintage. The new system establishes linkages with the existing operating systems of the user, simplifying usage and enhancing the programme's usefulness as a management and reporting tool. The Scorecard's indicators have been extended to include triple bottom line reporting (environmental, social and economic indicators), and now incorporate the measurement of:

- Water quality and efficiency of water use
- Waste Minimisation
- Optimal Chemical Management
- Energy Efficiency

BENCHMARKING AND ENERGY AND WATER SAVINGS TOOL (BEST)

The "BEST" tool has been developed to assist in creating efficiency gains in energy use by wineries. Adapted from a Californian system, this tool was successfully trialled across (25) wineries, gaining universal acceptance for its ease of use, and its ability to identify options for potential improvements.

GRAPE FUTURES PROJECT

The Grape Futures project is a joint industry research initiative (now in the second year of a three-year term) that aims to develop, test and implement a protocol for nil residue wine grape production. The first year introduced the pilot programme to growers in Hawkes Bay. In 2008/09 the programme was extended to include 3 sites in Gisborne, enabling the new protocols to be evaluated in a higher disease pressure risk region. In the final year the tested protocols will be rolled out to the wider industry.

HORTICULTURAL INFORMATION PORTAL PROJECT

The Horticultural Information Portal (HIP) is a collaborative project between Kiwifruit, Wine and Avocado industries. It aims to enable sectors to focus their limited resources on developing and extending the latest best-practice production information. This web-based platform will provide a searchable database, allowing the sharing of information and resources across the NZ fruit production industry. In 2008/09 a project team developed the platform, and the initial information modules have been agreed and completed. The project is expected to be fully operational in June 2010 and will provide an important base for dissemination of information to the industry.

1994
NZ Wine Industry reviews international sustainable viticulture schemes.

1995
NZ Wine Industry decides to implement a system to ensure overriding sustainability in the industry.

Project working group formed, and pilot program established with 5 vineyards.

1998
Integrated Wine Grape Production (IWGP) programme goes "live" across NZ with 120 vineyard members.

2000
First external audits undertaken for member accreditation.

2002
Winery programme developed and piloted with 10 wineries.

2004
Winery programme goes "live" across all NZ with 30 winery members.

2006
NZ Wine Industry undertakes external review of SWNZ and industry practices to ensure international credibility.

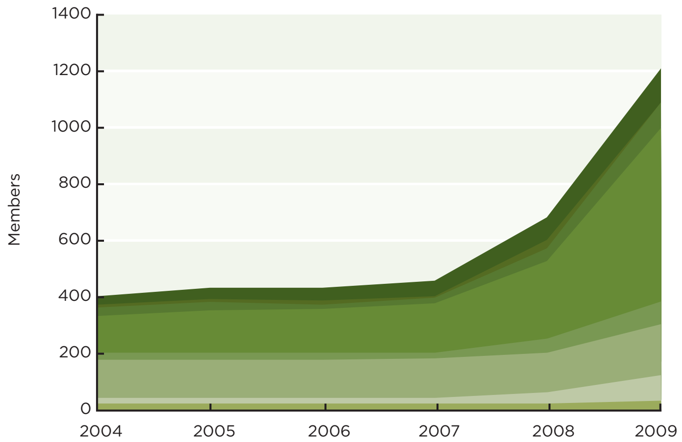
2007
NZ Wine Industry makes commitment to 100% Sustainability by the year 2012.

2008
Membership numbers increased by 40%.

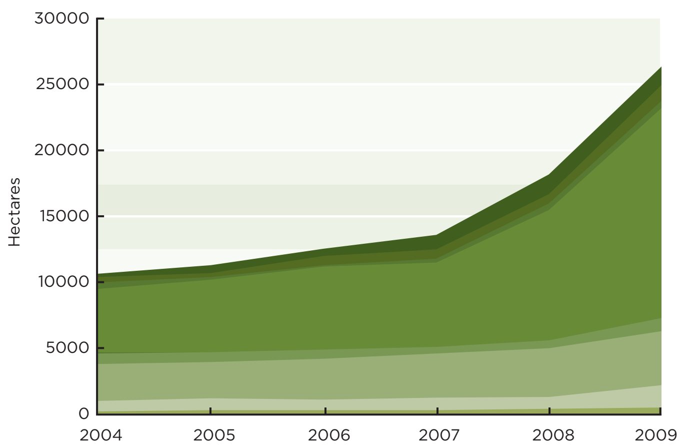
2009
Vineyard membership covers 85% of producing area. Audit management tools developed and introduced.

Winery membership increased by 50%. New scorecards and audit management tools developed and introduced.

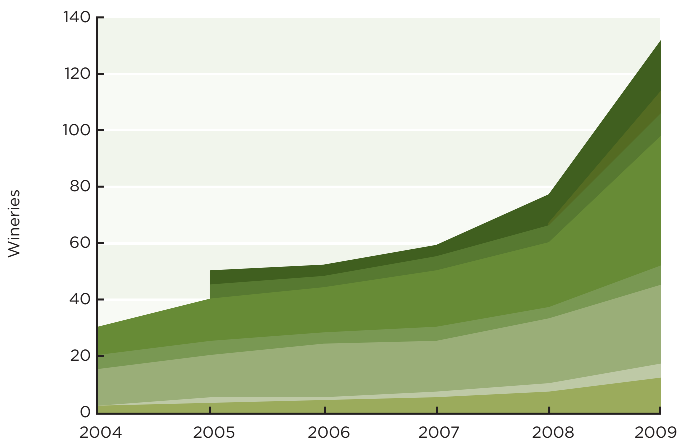
SWNZ VINEYARD MEMBERSHIP 2004-2009



SWNZ AREA HA 2004-2009



SWNZ WINERY MEMBERSHIP 2004-2009



WATER MANAGEMENT TOOLS FOR VINEYARDS

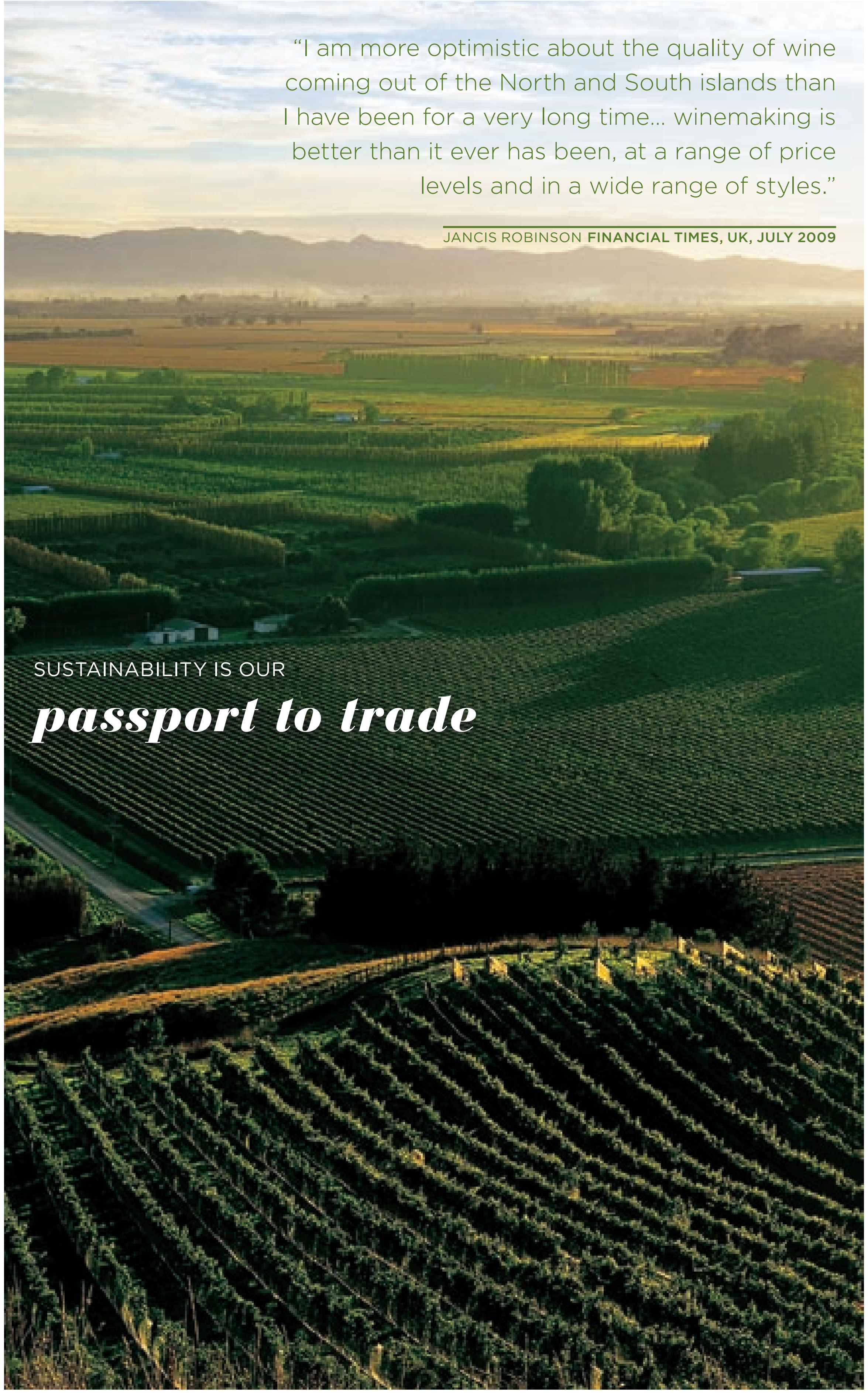
Efficient irrigation is essential in producing high-quality grapes at economic yields, and the industry needs to be able to report appropriately on water usage to local communities, regulatory authorities, markets and consumers. In 2008/9 Water Sustainability Indicators for irrigation have been prepared and will be included where relevant within the scorecard, manual, and management tools.

SUMMARY

A major focus this year has been on boosting the effectiveness, efficiency and practical use of SWNZ measurement and benchmarking tools. Resources have been deployed to efficiently manage rapid growth in participation, and to maximise the opportunity for industry to shape future development based on learning from the data being provided through the programme. As the industry considers its future position with respect to sustainability it is clear that a broad approach will continue to required to meet evolving market demands.

KEY

- OTAGO
- WAIPARA/CANTERBURY
- NELSON
- MARLBOROUGH
- WELLINGTON/WAIRARAPA
- HAWKES BAY
- GISBORNE
- AUCKLAND



RESEARCH REPORT

New Zealand wines are uncompromising in their delivery to consumers of the pure New Zealand experience.

They express the distinctive characteristics of the New Zealand offering, and continue to deliver superb quality at exceptional value. Growing and making top quality wines, however, is a process of ongoing compromises. Growers and winemakers constantly have to make management decisions to nurture their product through to the final outcome — that glass of fantastic wine in the consumer's hand.

Growers must adapt to and manage the results of the interaction of grapevines with their environment. Be it decisions on yield and canopy management; management of disease; timing of vineyard activities that influence quality; right through to the all important timing of harvest — the topic of much debate with winemakers. Add to these the complexity of decisions post harvest for the wine maker — pressing levels; yeast and ferment temperature selections; oak or not; blending and finishing. All of these activities interact with each other and influence the final grape and wine quality.

On top of all of this, grape growers and wine makers must manage production logistics and cost to ensure that the quality glass of great value wine is delivered to the consumer profitably.

The role of New Zealand Winegrowers' research programme is to provide practical information to industry to assist their decision making processes. The programme provides information on how various vine/environment interactions and management interventions influence final grape and wine quality. To provide this applied knowledge it is important to gain an understanding of fundamental elements of viticultural and wine science. The programme encourages deployment of the best tools and techniques available by the science community to gain this fundamental understanding. It also seeks to develop projects to bridge the gap between scientific discovery and application by industry. Recognising one of the biggest compromises facing individuals is allocation of their time, the research programme has made a significant commitment to making the key research findings readily available in quick and easy to assimilate formats.

ENDURING VINES FOR ENDURING WINES

The growth in vineyard area has been significant over the last decade. Most of the producing vineyards are relatively young vines and these represent a significant long-term investment. There are several fungal and viral diseases that can seriously affect this long-term investment either in the early establishment phase or through long-term vine decline with direct impacts on grape quality.

Much of the research into the fungal wood rotting diseases of grapevines is in the early research phase and is not ready for application. A significant amount of this work is targeted at improving the quality of nursery stock for new planting and replacements. Some of the outcomes will address pruning strategies to minimise infections in older vineyards.

A virus elimination programme has been initiated to develop and implement region-wide strategies for elimination of the virus threat to vineyards. This programme is designed to implement the findings from several years of research into virus management. This highly applied approach relies on significant participation and collaboration between industry participants.

TARGETING GRAPE QUALITY

Building on the old adage 'great wine is made in the vineyard' much of New Zealand Winegrowers' research investment is focused on aspects of quality grape production. While it would be ideal to investigate all varieties grown, to maximise value from the investment, Sauvignon Blanc and Pinot Noir are used as the primary model varieties.

Over the last year the industry has renewed its focus on managing vineyard yields to specific targets, and focusing on quality production. Much of the recent research investment by New Zealand Winegrowers and our research partners has provided significant benefit in achieving these aims in vintage 2009 and beyond.

Comprehensive studies on yield prediction and the various components of yield, and their relationship to quality have been conducted primarily through researchers at the Marlborough Wine Research Centre. These studies, which form part of the wider Sauvignon Blanc Programme, have provided vital information to industry when developing yield management strategies to target improved quality.

Having a good yield prediction model has provided the industry with an important early warning device. Being able to quantify potential yields early provides guidance for pruning and crop management strategies, and also assists in guiding required capital investment. Studies on training systems, cane selection, and impacts of crop load have provided practical guidance to industry on methods for yield management and their likely impact on quality. An important project on mechanical thinning of grapes is providing a promising new tool for industry to cost effectively manage yield. New Zealand is at the forefront of a growing international focus of research on Sauvignon Blanc. Despite significant advances in our knowledge we can still only explain and manage a relatively small amount of the complexity and unique characteristics in our wines. Future focus will continue to be on unravelling this complexity, with an emphasis on vineyard-derived drivers of quality, and on improving our ability to predict the final outcome of our interventions on the characteristic qualities of our wines.

WORKING TOGETHER AND INVESTING WISELY

Industry investment into research is critical to the long-term development and well-being of the industry. As the industry has grown, the money available through levies to invest collectively in research on the industry's behalf has grown. This funding base has allowed the industry to invest directly on specific projects of direct application, and undertake activities which could not be afforded by individuals or companies.

> "As Syrah is a versatile grape capable of yielding superb wines in cooler microclimates within warm areas as well as in protected spots within cooler regions, it appears to have a bright future in New Zealand."
>
> STEVE TANZER **INTERNATIONAL WINE CELLAR, USA SEPTEMBER 2008**

New Zealand Winegrowers works directly with industry and research providers to develop large collaborative research programmes that qualify for funding from outside sources, primarily Government research funds. These large programmes create a critical mass of research activity to make a real difference, and often form the platform for transfer of knowledge to the industry through direct involvement. Currently for every levy dollar invested in research projects there is approximately another $6 of research investment into our industry by all stakeholders.

Building beyond this present investment is critical if the industry is to grow their knowledge base for the future. The industry currently has a major engagement with three large programmes funded by the Foundation for Research Science and Technology. These form the central hub of the wider research programme and are fundamental to building critical mass.

However, the current support for the industry from this source does not reflect the contribution of the industry to the country's GDP and we will seek to grow this support in the future.

MAF Sustainable Farming Fund continues to provide vital support to the industry. This funding allows for development of applied projects, and assists extension and uptake of research findings. New Zealand Winegrowers is pleased to see an increased emphasis in Government science funding to deliver benefits to industry, such as the recently established Primary Growth Partnership. We will continue to explore partnership opportunities to enhance our applied research.

PASSING KNOWLEDGE ON

With the increasing amount of information flowing from the programme comes the issue of getting this information into the right hands.

Many of the research projects supported by the programme are reported through conferences, particularly the Romeo Bragato Conference, various seminars and workshops in the regions. The inclusion of a regular research supplement in the New Zealand Winegrower Journal has provided updates on current findings from the programme, and this is supported by wider reporting in the print media. In a new approach New Zealand Winegrowers is working closely with our research providers on the development of a factsheet format which can be delivered through the internet, providing quick access to key summaries of the research.

The Bragato Trust was established in 2007 thanks to a generous bequest from Jan Colville granddaughter of Romeo and Laura Bragato to further research into New Zealand's grape and wine industry and to provide scholarships to exceptional graduates. Three scholarships have been awarded so far by the Bragato Trust.

UNDERGRADUATE AWARD

MATTHEW FOX, GISBORNE
Studying combined Bachelor of Viticulture & Wine Sciences at EIT.

POSTGRADUATE SCHOLARSHIP

GERARD LOGAN, HAWKES BAY
Studying for a Ph D, in Chemistry, at Auckland University. Thesis — "Rotundone: The impact of viticulture on fruit and wine sensory components in Syrah."

RESEARCH FELLOWSHIP

VAUGHN BELL, HAWKES BAY
Scientist at Institute of Plant & Food Research, Havelock North. Research project — to determine the efficacy of herbicides on leafroll virus infected vines to eliminate the disease from remnant vine roots.

RESEARCH PROJECTS FUNDED THIS YEAR:

CURRENT RESEARCH PROJECTS

MEALYBUG MANAGEMENT & ECOLOGY IN VINEYARDS 2008-2009
Plant and Food Research (J Walker)

IDENTIFICATION OF MICRO-ORGANISMS ASSOCIATED WITH SOUR ROT OF GRAPES IN THE GISBORNE DISTRICT
Plant and Food Research (Bob Fullerton)

SOIL DRENCH APPLICATION OF IMIDACLOPRID TO CONTROL MEALYBUGS
Plant and Food Research (P Lo)

POST-HARVEST APPLICATION OF IMIDACLOPRID FOR CONTROL OF MEALYBUG CRAWLERS
Plant and Food Research (P Lo)

VISIT BY DR JOCELYN MILLAR, PROFESSOR OF ENTOMOLOGY
Plant and Food Research (V Bell)

IMPLEMENTATION OF VIRUS ELIMINATION STRATEGY

INCREASING THE DETECTION RATES OF GLRAV-3 VIRUS
Linnaeus Laboratory (J McKay)

UNDERSTANDING AN INNATE RESISTANCE TO VIRUS INFECTION IN PLANTS
University of Auckland (E Chan)

CYLINDROCARPON BLACKFOOT DISEASE — A STUDY INTO ITS IDENTIFICATION, EPIDEMIOLOGY AND CONTROL
Lincoln University (M Jaspers)

BOTRYOSPHAERIA TRUNK DISEASES — IDENTIFICATION, EPIDEMIOLOGY & CONTROL
Lincoln University (M Jaspers)

USING METEOROLOGICAL DATA TO PREDICT REGIONAL VINEYARD YIELD
Plant and Food Research (M Trought)

GRAPE FUTURES — IMPLEMENTING ULTRA LOW RESIDUE WINE GRAPE PRODUCTION
Plant and Food Research (P Elmer) Supported by MAF Sustainable Farming Fund

VINEYARD INFORMATION SYSTEMS FOR BOTRYTIS RISK MANAGEMENT
Plant and Food Research (R Beresford)

CARBOHYDRATE MANAGEMENT OF GRAPEVINES
Plant and Food Research (M Trought)

EFFECT OF TIMING OF LEAF REMOVAL ON PINOT NOIR
Lincoln University (R Harrison)

IMPACT OF SOIL VARIABILITY ON PINOT NOIR
Plant and Food Research (C Vasconcelos)

IMPACT OF VINE VIGOUR ON FLAVOUR
Plant and Food Research (C Vasconcelos)

THE USE OF MECHANICAL THINNING IN THE MANAGEMENT OF SAUVIGNON BLANC VINES
Plant and Food Research (M Trought)

WHAT MAKES THIS WINE A SAUVIGNON BLANC?
Plant and Food Research (S Jaeger)

THE EFFECT OF POST HARVEST DEFOLIATION ON CARBON AND NITROGEN BALANCE OF HIGH YIELDING SAUVIGNON BLANC VINES
Plant and Food Research (C Vasconcelos)

ASSESSING ATTRIBUTES OF SAUVIGNON BLANC USING FOURIER TRANSFORM INFRARED (FTIR) SPECTROSCOPY
Plant and Food Research (Peter Schaare)

INFLUENCE OF SUGAR CONCENTRATION ON THIOL SENSORY PROPERTIES OF SAUVIGNON BLANC
Plant and Food Research (M Trought)

PROTEIN STABILISATION OF NEW ZEALAND SAUVIGNON BLANC
Lincoln University (R Harrison), supported by The Foundation for Research, Science and Technology and Pernod Ricard

SENSORY EVALUATION OF RESEARCH WINES & DEVELOPMENT IN HOUSE PANEL
Lincoln University (W Parr)

SENSORY EVALUATION OF WINE: PSYCHOLOGICAL ASPECTS
Lincoln University (W Parr)

IMPROVED PRESS FRACTIONS FROM SAUVIGNON BLANC
Auckland Uniservices Ltd (P Kilmartin)

ADDING NITROGEN IN THE VINEYARD OR WINERY
Plant and Food Research (K Stronge)

BREEDING WINE YEASTS
Auckland Uniservices Ltd (R Gardner)

DEVELOPMENT OF ANALYTICAL CAPACITY FOR ANALYSIS OF AROMA AND FLAVOUR COMPOUNDS IN PINOT NOIR
Auckland Uniservices Ltd (P Kilmartin)

CONTRACT SYNTHESIS OF LABELLED THIOLS
Auckland Uniservices Ltd (L Nicolau)

SUSTAINABLE WINERY WASTE MANAGEMENT
MWH New Zealand Limited (P Jacobson) a SWNZ project

NEW ZEALAND WINEGROWER MAGAZINE RESEARCH ARTICLES
Various

SURVEYS

VINEYARD SURVEY 2008
Blackbox Spatial

VINTAGE SURVEY 2009
New Zealand Winegrowers

EXPORT PROJECTIONS SURVEY 2008-2013
New Zealand Winegrowers

PUBLICATIONS

MONTHLY NEWSLETTER TO MEMBERS**
New Zealand Winegrowers

NEW ZEALAND WINEGROWER
Published quarterly by WineZeal Enterprises Ltd under authority of New Zealand Winegrowers

STATISTICS ANNUAL 2008*
New Zealand Winegrowers

MONTHLY NEW ZEALAND WINE EXPORT REPORT**
New Zealand Winegrowers

ROMEO BRAGATO CONFERENCE PROCEEDINGS
(available for purchase)

EXPORT WINE GRAPE SPRAY SCHEDULE 2008/2009**
Rex Sunde, Fantail Island Ltd

INTERNATIONAL LABELLING GUIDE (12TH EDITION)
New Zealand Winegrowers

INTERNATIONAL WINEMAKING PRACTICES GUIDE (SECOND EDITION FEB 2009)**
New Zealand Winegrowers

SEASONAL VINEYARD WORKERS — A PRACTICAL GUIDE TO YOUR LEGAL OBLIGATIONS **
New Zealand Winegrowers

WIND MACHINE CODE OF PRACTICE 2008 **
New Zealand Winegrowers

PLANNING FOR THE WINE INDUSTRY
Available on www.qualityplanning.org.nz

WINE STANDARDS MANAGEMENT PLAN CODE OF PRACTICE
New Zealand Winegrowers

EUROMONITOR COUNTRY MARKET REPORTS FOR 30 COUNTRIES
New Zealand Winegrowers (Available only to Country Generic Fee Payers)

NEW ZEALAND WINE GENERIC MARKETING PROGRAMME 2008/2009**
New Zealand Winegrowers

NEW ZEALAND WINE PROMOTIONAL MATERIAL
New Zealand Winegrowers (Available for purchase)

NEW ZEALAND WINEGROWERS POST EVENT REPORTS**
New Zealand Winegrowers

NEW ZEALAND WINEGROWER'S BOARD MEETING REPORTS**
New Zealand Winegrowers

MONTHLY DOMESTIC MARKET REPORT
New Zealand Winegrowers

AC NIELSEN SCANTRAK DATA REPORTS**

†Brackets indicate primary contact * Denotes those available on www.nzwine.com ** Denotes those available on www.nzwine.com/members

WINE AWARDS

AIR NEW ZEALAND WINE AWARDS 2008

The Air New Zealand Wine Awards is the premier wine competition in New Zealand, recognising excellence in winemaking. Every year kiwi wine lovers eagerly await the results of the Air New Zealand Wine Awards to help them with their selection of quality New Zealand wine.

JUDGING & RESULTS

In 2008, a record 1751 wines were rigorously judged by a team of local and international wine experts to identify medal and trophy winners.

The 2008 international judges included James Lawther MW, an independent wine writer based in Bordeaux; Joshua Greene, Editor and Publisher of Wine & Spirits magazine; Kym Milne MW, Wine Consultant and Nick Stock, Wine Critic and Author.

18 trophies were awarded including the Air New Zealand Champion Wine of the Show Trophy.

A total of 3 Pure Elite Gold, 28 Elite Gold, 4 Pure Gold, 156 Gold, 19 Pure Silver, 220 Silver, 32 Pure Bronze and 367 Bronze medals were awarded in 2008.

ADVERTISING & PR CAMPAIGN

A comprehensive marketing and public relations campaign was undertaken to promote the 2008 Air New Zealand Wine Awards.

The advertising campaign included press advertising in national and regional newspapers, radio advertising on Newstalk NZ and lifestyle magazines including Kia Ora, Cuisine, Cuisine Wine Country, NZ House & Garden and NZ Life & Leisure.

Trophy and Gold Medal Guides were also produced with 50,000 copies being distributed.

Significant media coverage resulted from the PR campaign, including key television coverage, radio coverage and numerous articles in newspapers, magazines and online.

Auckland media also had the chance to be the first to taste the 2008 Air New Zealand Wine Award gold and pure gold medal wines on the day they were announced, at a private VIP tasting.

New Zealand Winegrowers and Air New Zealand also took the opportunity to host seven New Zealand and three international media at the Gala Dinner.

AIR NEW ZEALAND WINE AWARDS DINNER

The 2008 gala awards dinner was held in Wellington to announce and celebrate the trophy-winning wines and acknowledge the talents of our winemakers.

Over 760 guests experienced the trophy wines first-hand, accompanied by a six-course dinner designed by Air New Zealand's executive chefs. The entertainment reflected the 'creative capital' of New Zealand and included The Improvisors, the World of Wearable Art, award winning actress Geraldine Brophy, Wellington International Ukulele Orchestra, and The Beat Girls.

This black tie dinner was one to remember with the quality cuisine delivered by Ruth Pretty Catering perfectly complimenting the fine trophy wine.

DINNER & TASTING — AUSTRALIA

To further strengthen the credibility of the Air New Zealand Wine Awards medals in Australia, the 2008 gold medal wines were launched to a select audience of top media and trade in Melbourne. Guests enjoyed a private degustation dinner and tasting, which was hosted by previous and current Air New Zealand Wine Awards judges.

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

> "Geez, the Kiwis do the marketing thing well, don't they? Just a couple of days after the Air New Zealand Wine Awards night in Wellington, a few of them hopped on a plane… and flew across the ditch to show off almost all the gold medal and trophy winners from the competition. What a great opportunity to taste a line up of the islands' best wines."

MAX ALLEN **THE WEEKEND AUSTRALIAN, DEC 2008**

TROPHIES AWARDED

Air New Zealand Champion Wine of the Show Trophy
CHURCH ROAD RESERVE SYRAH 2007

Bell Gully Champion Sustainable Wine Trophy
CROSSROADS WINERY ELMS VINEYARD HAWKES BAY RESERVE SYRAH 2007

O-I New Zealand Champion Chardonnay Trophy
VIDAL RESERVE HAWKES BAY CHARDONNAY 2007

Guala Closures New Zealand Champion Sauvignon Blanc Trophy
GOLDWATER SAUVIGNON BLANC 2008

JF Hillebrand New Zealand Ltd Champion Pinot Noir Trophy
ROCKBURN PINOT NOIR 2007

Nissan New Zealand Ltd Champion Sparkling Wine Trophy
DANIEL LE BRUN BLANC DE BLANC 2000

BDO Spicers Champion Other White Styles & Rosé Trophy
VILLA MARIA ESTATE SINGLE VINEYARD OMAHU GRAVELS VIOGNIER 2007

Business World Travel Champion Cabernet Sauvignon or Merlot/Cabernet Blend Trophy
SELAKS THE FAVOURITE MERLOT CABERNET 2007

Fairfax Media Champion Open Red Wine Trophy
ROCKBURN PINOT NOIR 2007

Fruitfed Supplies Champion Syrah Trophy
CHURCH ROAD RESERVE SYRAH 2007

HortResearch Champion Riesling Trophy
FORREST THE DOCTORS' RIESLING 2008

The Huka Retreats Champion Pinot Gris Trophy
SHINGLE PEAK RESERVE PINOT GRIS 2008

Label and Litho Champion Gewürztraminer Trophy
HUNTER'S GEWÜRZTRAMINER 2008

New Holland Agriculture Champion Merlot Trophy
NOT AWARDED

New World Champion Open White Wine Trophy
GOLDWATER SAUVIGNON BLANC 2008

Newstalk ZB Champion Other Red Styles Trophy
TRINITY HILL GIMBLETT GRAVELS HAWKES BAY TEMPRANILLO 2007

Wineworks Champion Medium Sweet or Sweet Wine Trophy
FORREST THE DOCTORS' NOBLE CHENIN BLANC 2008

Corbans Viticulture Champion Exhibition White or Sparkling Wine Trophy
VILLA MARIA ESTATE RESERVE HAWKES BAY CHARDONNAY 2006

Kapiti Champion Exhibition Red Wine Trophy
NAUTILUS FOUR BARRIQUES PINOT NOIR 2007

BRAGATO WINE AWARDS 2008

This unique competition commenced in 1995 and is designed to recognise viticultural excellence in New Zealand. The Bragato Wine Awards acknowledge the influence of grape growers and their vineyards in creating the unique qualities of New Zealand wines.

With entries limited to wines produced from grapes grown by a specific individual, many of the record 883 entries in 2008 were produced from a single vineyard.

The competition is indebted to Competition Director Mark Compton and his two judging panels and team of stewards together with the sponsor, O-I New Zealand.

The trophies awarded at the Bragato Awards honour individuals who have made a particular viticultural contribution to those varieties and styles.

TROPHIES AWARDED

Champion Wine Of Show And Bragato Trophy Winner
OLSSENS JACKSON BARRY PINOT NOIR 2007
OLSSEN'S GARDEN VINEYARD – CENTRAL OTAGO
JOHN OLSSEN

Champion Amateur Wine Plaque
SILVERTON ROAD MERLOT CABERNET MALBEC 2007
SILVERTON ROAD VINEYARD – HAWKES BAY
BRUCE LEPPARD

Mike Wolter Memorial Trophy And Champion Pinot Noir
OLSSENS JACKSON BARRY PINOT NOIR 2007
OLSSEN'S GARDEN VINEYARD – CENTRAL OTAGO
JOHN OLSSEN

Champion Cabernet Sauvignon
MILLS REEF ELSPETH CABERNET SAUVIGNON 2006
MERE ROAD VINEYARD – HAWKES BAY
PADDY AND TIM PRESTON

Tom Mcdonald Memorial Trophy And Champion Classical Red Wine
SAINT CLAIR RAPAURA RESERVE MERLOT 2006
RAPAURA VINEYARD – MARLBOROUGH
NEAL AND JUDY IBBOTSON

Alan Limmer Trophy And Champion Syrah
NEWTON FORREST SYRAH 2006
CORNERSTONE VINEYARD – HAWKES BAY
BOB NEWTON

Champion Other Red Wine
BEACH HOUSE MONTEPULCIANO 2007
THE TRACK VINEYARD – HAWKES BAY
CHRIS HARRISON

Richard Smart Trophy And Reserve Champion Wine
PALLISER ESTATE CHARDONNAY 2007
PALLISER VINEYARD – MARTINBOROUGH
ALLAN JOHNSON

Friedrich Wohnsiedler Trophy And Champion Riesling
SEIFRIED RIESLING 2007
SEIFRIED ESTATE - NELSON
HERMANN SEIFRIED

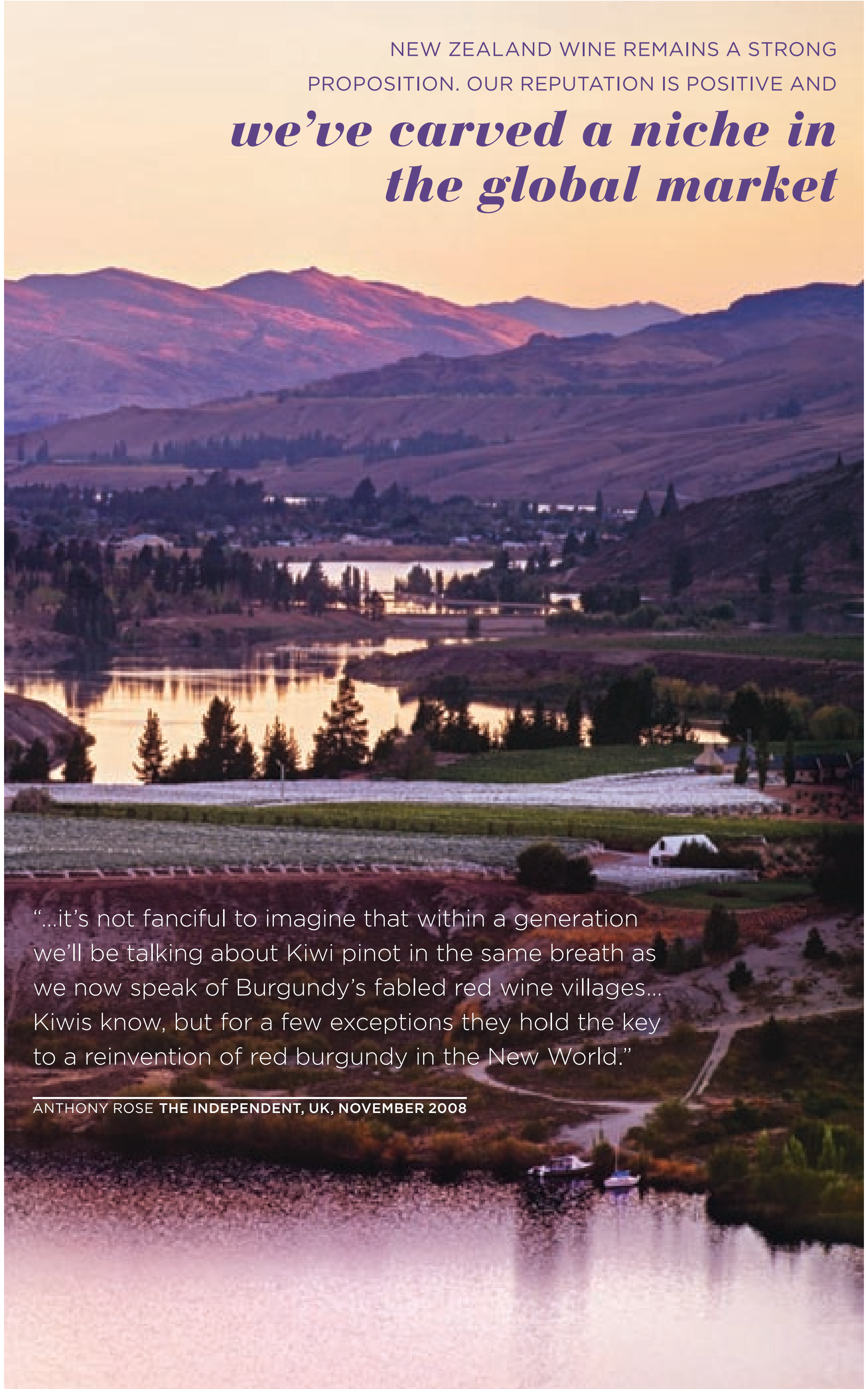
Champion Gewürztraminer
SAINT CLAIR PIONEER BLOCK 12 LONE GUM GEWÜRZTRAMINER 2007
LONE GUM VINEYARD - MARLBOROUGH
CHRIS AND JUDY SIMMONDS

Brother Cyprian Trophy And Champion Pinot Gris
WAIMEA BOLITHO SV PINOT GRIS 2007
TH & RM BOLITHO VINEYARD – NELSON
TREVOR BOLITHO

New Zealand Wine Cellars Trophy And Champion Sauvignon Blanc
SAINT CLAIR PIONEER BLOCK 6 'OH' BLOCK SAUVIGNON BLANC 2008
BUCKLAND GROVE VINEYARD - MARLBOROUGH
MARTIN AND GAIL GOYNE

Bill Irwin Trophy And Champion Chardonnay
PALLISER ESTATE CHARDONNAY 2007
PALLISER VINEYARD – MARTINBOROUGH
ALLAN JOHNSON

Champion Dessert Wine Plaque
ASKERNE NOBLE SEMILLON 2006
ASKERNE VINEYARD – HAWKES BAY
KATHRYN AND JOHN LOUGHLIN



STATISTICS

SUMMARY: NEW ZEALAND WINE (2000-2009)

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Number of Wineries	358	380	398	421	463	516	530	543	585	643
Producing Area (hectares)	10,197	11,648	13,787	15,800	18,112	21,002	22,616	25,355	29,310	31,057*
Average Yield (tonnes per hectare)	7.8	6.1	8.6	4.8	9.1	6.9	8.2	8.1	9.7	9.2
Average Grape Price ($ per tonne)	1,153	1,441	1,634	1,929	1,876	1,792	2,022	1,981	2,161	
Tonnes Crushed	80,100	71,000	118,700	76,400	165,500	142,000	185,000	205,000	285,000	285,000
Total Production (millions of litres)	60.2	53.3	89	55	119.2	102	133.2	147.6	205.2	205.2
Domestic Sales of NZ Wine (millions of litres NZ Wine)	41.3	36.2	32.6	35.3	35.5	45	50	51	46.5	59.7
Consumption per Capita NZ wine in NZ (litres)	10.8	9.3	8.2	8.8	8.8	11.2	12.1	12.2	11.1	13.9
Total sales of all wine in NZ (millions of litres)	66.2	66.6	68.3	74.5	79.7	81.7	86	91.8	87.4	92.3
Consumption per Capita all wines in NZ (litres)	17.3	17.3	17.4	18.6	19.6	19.8	20.6	21.7	20.8	21.4
Export Volume (millions of litres)	19.2	19.2	23	27.1	31.1	51.4	57.8	76	88.6	112.6
Export Value (millions of NZ$ FOB)	168.6	198.1	246.4	281.9	302.6	434.9	512.4	698.3	797.8	991.7
Sustainable Winegrowing New Zealand Membership – Vineyards					403	431	432	457	683	1244
Sustainable Winegrowing New Zealand Membership – Wineries					30	51	53	59	77	135

* Estimate

WINERIES AND GRAPE GROWERS (2000-2009)

WINERIES BY CATEGORY*	2000	2001	2002	2003	2004	2005	2006	2007*	2008†	2009
Category I	331	353	369	388	425	466	482	483	523	577
Category 2	23	24	26	30	34	44	42	51	56	60
Category 3	4	3	3	3	4	6	6	9	6	6
TOTAL	358	380	398	421	463	516	530	543	585	643

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

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

WINERIES BY REGION	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Northland	7	7	8	7	8	10	10	11	14	14
Auckland	79	81	82	89	88	90	91	92	103	109
Waikato/Bay of Plenty	12	12	13	13	13	17	18	17	19	20
Gisborne	13	15	17	16	17	19	22	19	22	24
Hawkes Bay	44	50	53	56	58	62	66	67	71	79
Wellington	37	41	45	44	49	54	56	57	58	61
Nelson	25	28	27	26	24	29	29	28	32	34
Marlborough	62	63	68	74	84	101	106	104	109	130
Canterbury	39	37	38	42	46	50	48	52	54	62
Otago	39	45	46	52	75	82	82	89	95	103
Other Areas	1	1	1	2	1	2	2	7	8	7
TOTAL	358	380	398	421	463	516	530	543	585	643

GRAPE GROWERS BY REGION	AUCK	WAIK	GISB	HB	WAIR	NELS	MARL	WAIP	CANT	OTAGO	TOTAL
2003	13	9	89	136	29	37	254	6	19	42	634
2004	17	5	97	126	17	28	275	6	12	11	594
2005	18	7	108	168	33	40	415	7	12	17	825
2006	20	9	92	157	39	46	428	11	21	50	875
2007	25	4	100	186	25	58	530	12	4	63	1007
2008	38	13	89	172	44	57	524	20	41	75	1073
2009	44	11	87	171	48	62	568	22	38	77	1128

NEW ZEALAND PRODUCING VINEYARD AREA (2002-2011)

BY GRAPE VARIETY (HECTARES)	2002	2003	2004	2005	2006	2007	2008	2009*	2010*	2011*
Sauvignon Blanc	3,685	4,516	5,897	7,277	8,860	10,491	13,988	14,735	14,844	15,383
Pinot Noir	2,029	2,624	3,239	3,757	4,063	4,441	4,650	4,702	4,753	4,824
Chardonnay	3,427	3,515	3,617	3,804	3,779	3,918	3,881	3,915	3,929	3,938
Merlot	1,077	1,249	1,487	1,492	1,420	1,447	1,383	1,367	1,371	1,386
Riesling	529	653	666	811	853	868	917	928	934	940
Pinot Gris	232	316	381	489	762	1,146	1,383	1,460	1,495	1,511
Cabernet Sauvignon	745	741	687	614	531	524	516	517	517	519
Gewürztraminer	178	197	210	257	284	293	316	316	316	316
Syrah	117	134	183	211	214	257	278	290	294	294
Semillon	233	257	306	240	229	230	199	183	181	181
Cabernet Franc	170	180	213	180	164	168	166	165	166	166
Malbec	116	152	168	163	155	160	156	157	157	160
Muscat Varieties	135	134	136	139	140	139	135	125	125	125
Müller Thurgau	307	256	155	137	116	106	79	78	78	78
Pinotage	87	82	82	85	90	88	74	74	74	74
Chenin Blanc	113	108	72	58	59	50	50	47	48	48
Reichensteiner	47	59	61	59	61	66	72	72	72	72
Other & Unknown	560	627	552	1,229	836	963	1,087	1,926	2,789	4,724
TOTAL**	13,787	15,800	18,112	21,002	22,616	25,355	29,310	31,057	32,143	34,739

BY REGION (HECTARES)	2002	2003	2004	2005	2006	2007	2008	2009*	2010*	2011*
Auckland	448	461	591	514	504	533	534	550	556	573
Waikato/Bay of Plenty	137	142	151	148	150	145	147	147	147	147
Gisborne	1,774	1,885	1,810	1,890	1,913	2,133	2,142	2,153	2,197	2,203
Hawkes Bay	3,463	3,702	3,873	4,249	4,346	4,665	4,899	4,928	4,945	4,963
Wairarapa/Wellington	475	595	737	779	777	827	855	871	882	885
Marlborough	5,731	6,831	8,539	9,944	11,488	13,187	15,915	16,682	16,787	17,347
Nelson	398	485	548	646	695	782	794	842	861	880
Canterbury/Waipara	482	601	641	853	925	1,034	1,732	1,754	1,760	1,764
Otago	534	703	844	978	1,253	1,415	1,552	1,540	1,561	1,598
Other & Unknown	345	395	378	1,001	565	634	770	1,590	2,447	4,379
TOTAL**	13,787	15,800	18,112	21,002	22,616	25,355	29,310	31,057	32,143	34,739

* Forward estimate
** Total corrected to account for assumed vineyard underestimation
Source: New Zealand Winegrowers' Vineyard Survey

NEW ZEALAND VINTAGES (2000-2009)

BY GRAPE VARIETY (TONNES)	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Sauvignon Blanc	15,472	20,826	36,742	28,266	67,773	63,297	96,686	102,426	169,613	177,647
Chardonnay	23,593	17,067	33,883	15,534	35,597	29,741	26,944	38,792	33,346	34,393
Riesling	4,070	4,377	5,038	3,376	5,647	4,792	6,745	6,017	8,547	6,316
Pinot Gris	572	747	1,214	836	1,888	1,655	3,675	6,053	12,417	11,410
Semillon	2,189	1,887	3,053	2,192	3,511	2,388	2,664	2,929	2,561	1,667
Müller Thurgau	6,353	4,231	4,806	1,685	3,888	2,144	1,573	1,437	847	506
Gewürztraminer	594	460	990	529	1,325	1,164	1,532	2,052	2,101	2,123
Muscat Varieties	3,487	1,694	2,623	1,242	1,828	2,098	1,532	2,017	1,697	1,505
Reichensteiner	1,185	723	1,184	644	1,140	675	762	512	681	0
Other White Vinifera	939	801	1,253	330	668	360	344	415	247	249
Chenin Blanc	1,992	1,041	1,322	391	1,325	629	337	212	151	93
Viognier						155	176	543	573	784
Pinot Noir	6,319	8,015	10,402	9,402	20,145	14,578	22,062	20,699	32,878	27,547
Merlot	4,090	2,573	6,502	4,957	9,330	9,194	11,206	11,714	10,166	11,723
Cabernet Sauvignon	3,792	2,782	4,375	3,201	4,045	3,018	2,659	2,462	2,270	2,304
Malbec	363	273	731	458	1,106	763	1,325	1,086	1,036	972
Syrah	257	244	397	330	691	758	1,057	1,514	1,452	1,500
Cabernet Franc	702	332	827	602	858	782	673	819	688	735
Pinotage	868	487	863	588	917	708	631	890	719	694
Other Red Vinifera	400	375	430	221	400	459	262	227	291	262
All Hybrids	20	51	51	38	17	47	40	8	69	17
SURVEY TOTAL	78,069	68,986	116,686	74,821	162,100	139,406	182,885	202,823	282,352	282,447
INDUSTRY TOTAL*	80,100	71,000	118,700	76,400	165,500	142,000	185,000	205,000	285,000	285,000

BY REGION (TONNES)	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Northland	105	84	186	182	144	183	208	203	204	148
Auckland	1,363	614	1,526	715	1,497	948	1,345	1,241	1,604	1,615
Waikato/Bay of Plenty	637	411	932	497	457	210	261	212	192	202
Gisborne	21,820	12,936	26,587	14,350	25,346	22,493	18,049	26,034	23,911	23,093
Hawkes Bay	23,886	10,887	25,661	10,832	30,429	28,098	33,287	41,963	34,284	40,985
Wellington	1,124	1,457	2,022	1,311	2,820	1,649	3,008	1,949	4,105	4,421
Marlborough	26,212	36,962	54,496	40,537	92,581	81,034	113,436	120,888	194,639	192,128
Nelson	1,125	2,313	1,785	3,149	4,563	2,454	5,623	5,190	7,002	7,740
Canterbury	788	1,779	1,972	1,422	2,825	895	3,051	1,699	6,881	5,476
Otago	1,009	1,543	1,519	1,825	1,439	1,441	4,612	3,434	9,495	6,218
Other							6			421
SURVEY TOTAL	78,069	68,986	116,686	74,821	162,100	139,406	182,885	202,823	282,352	282,447
INDUSTRY TOTAL*	80,100	71,000	118,700	76,400	165,500	142,000	185,000	205,000	285,000	285,000

* The data shown are the results from the NZW's Annual Vintage Surveys, whereas 'Industry Total' represents the tonnes crushed by the total wine industry. The difference between 'Total' and 'Industry Total' is data from wine companies who did not respond to the Vintage Survey.
Source: New Zealand Winegrowers' Annual Vintage Surveys.

NEW ZEALAND WINE EXPORTS BY MARKET (2000-2009)

		2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Australia	L	2.402	2.373	3.569	4.661	5.654	9.762	13.180	18.632	24.633	37.343
	$	23.857	26.059	38.132	51.621	56.285	88.033	122.441	179.933	246.696	323.312
UK	L	10.464	9.918	11.858	12.258	13.864	21.124	21.907	27.573	29.646	36.212
	$	84.673	92.728	117.981	113.729	119.786	162.120	166.937	227.418	240.730	267.913
USA	L	2.510	3.132	3.776	5.578	7.266	12.975	14.411	18.712	19.492	22.181
	$	26.530	40.815	48.225	67.390	80.026	113.237	138.411	175.515	159.787	223.666
Canada	L	0.648	0.612	0.713	0.988	0.700	1.477	2.061	3.182	5.219	5.055
	$	5.641	6.312	7.687	10.351	6.934	13.907	21.888	33.870	47.060	49.498
Netherlands	L	0.683	0.903	0.801	0.525	0.487	1.716	1.217	1.559	1.363	2.354
	$	5.281	7.656	7.119	5.058	4.404	12.688	10.017	13.318	12.808	20.831
Ireland	L	0.300	0.278	0.318	0.423	0.461	0.573	0.844	0.853	1.496	1.498
	$	2.173	2.151	2.893	4.141	4.307	5.200	8.158	8.920	15.012	16.501
Singapore	L	0.093	0.091	0.098	0.120	0.137	0.292	0.439	0.474	0.756	1.000
	$	1.216	1.385	1.509	1.723	2.009	3.556	4.401	5.996	9.507	13.370
Hong Kong	L	0.117	0.138	0.144	0.163	0.225	0.301	0.358	0.444	0.610	0.624
	$	1.117	1.547	1.905	1.962	2.209	2.992	3.428	4.528	6.171	8.870
Japan	L	0.365	0.391	0.268	0.326	0.426	0.491	0.406	0.484	0.545	0.504
	$	3.980	5.038	4.486	4.423	5.967	5.903	5.855	6.665	7.299	7.837
Denmark	L	0.295	0.266	0.316	0.460	0.443	0.527	0.508	0.654	0.654	1.019
	$	2.377	2.497	3.253	4.524	4.019	4.608	4.656	6.029	5.836	6.510
China	L	0.004	0.003	0.007	0.016	0.032	0.050	0.124	0.204	0.238	0.544
	$	0.043	0.043	0.107	0.209	0.298	0.540	1.227	2.124	2.436	6.130
Germany	L	0.226	0.377	0.155	0.220	0.175	0.307	0.301	0.382	0.462	0.530
	$	2.423	3.324	1.965	2.900	2.446	3.289	2.914	3.699	5.342	5.680
Others	L	1.064	1.029	1.264	1.191	1.673	2.305	2.543	2.871	3.521	3.782
	$	9.324	11.046	14.404	13.805	17.927	23.391	35.742	30.287	39.113	41.602
TOTAL	L	18.875	19.245	22.971	27.114	31.101	51.373	57.791	76.024	88.636	112.647
	$	166.257	198.104	246.413	281.838	302.599	434.856	512.362	698.303	797.797	991.721

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

> "The event was a trade tasting... called 'New Zealand Wine Fair: Singapore 2008'. It was very well organised, showcasing a decent selection of producers large and small, good and great. ...New Zealand Winegrowers supplied a lot of up-to-date information and winery details. A good day's tasting."

LISA PERROTTI-BROWN **MW ON EROBERTPARKER.COM**

NEW ZEALAND WINE EXPORTS BY MARKET (YEAR END JUNE 2009)

		WHITE 750ML	WHITE OTHER	WHITE TOTAL	RED 750ML	RED OTHER	RED TOTAL	SPARKLING	FORTIFIED	TOTAL
Australia	L	25.695	6.036	31.731	2.144	1.941	4.084	1.527	0.001	37.343
	$	240.000	30.476	270.477	28.299	8.730	37.029	15.791	0.015	323.312
	$/L	$9.34	$5.05	$8.52	$13.20	$4.50	$9.07	$10.34	$20.16	$8.66
United Kingdom	L	24.351	7.335	31.687	3.653	0.077	3.730	0.795		36.212
	$	201.629	22.411	224.040	37.970	0.433	38.404	5.468	0.001	267.913
	$/L	$8.28	$3.06	$7.07	$10.39	$5.64	$10.30	$6.88	$63.30	$7.40
U.S.A.	L	18.201	2.131	20.331	1.825		1.825	0.025		22.181
	$	185.790	10.890	196.680	26.599	0.001	26.600	0.385	0.002	223.666
	$/L	$10.21	$5.11	$9.67	$14.57	$66.67	$14.57	$15.66	$90.55	$10.08
Canada	L	3.015	1.409	4.424	0.523	0.096	0.620	0.006	0.006	5.055
	$	38.010	3.715	41.724	7.313	0.302	7.615	0.058	0.100	49.498
	$/L	$12.61	$2.64	$9.43	$13.98	$3.13	$12.29	$9.48	$18.04	$9.79
Netherlands	L	1.913	0.160	2.073	0.222	0.025	0.248	0.033		2.354
	$	16.450	0.771	17.221	3.193	0.128	3.321	0.289		20.831
	$/L	$8.60	$4.82	$8.31	$14.36	$5.07	$13.42	$8.83		$8.85
Ireland	L	1.286	0.010	1.296	0.202		0.202			1.498
	$	13.640	0.126	13.767	2.735		2.735			16.501
	$/L	$10.61	$12.70	$10.62	$13.53		$13.53			$11.01
Singapore	L	0.805	0.004	0.809	0.180	0.001	0.181	0.011		1.000
	$	10.322	0.055	10.377	2.798	0.013	2.812	0.171	0.011	13.370
	$/L	$12.83	$13.65	$12.83	$15.57	$13.83	$29.39	$16.16	$72.83	$13.37
Hong Kong	L	0.464	0.024	0.488	0.119	0.006	0.124	0.012		0.624
	$	5.942	0.270	6.213	2.401	0.087	2.488	0.168	0.002	8.870
	$/L	$12.81	$11.39	$12.74	$20.23	$15.61	$20.02	$13.86	$33.09	$14.22
Japan	L	0.315		0.315	0.185	0.003	0.188	0.001		0.504
	$	4.340	0.005	4.345	3.405	0.062	3.467	0.024	0.001	7.837
	$/L	$13.79	$17.13	$13.80	$18.38	$20.21	$18.41	$19.50	$123.83	$15.54
Denmark	L	0.575	0.391	0.966	0.053		0.053			1.019
	$	4.478	1.153	5.631	0.872		0.872	0.007		6.510
	$/L	$7.79	$2.95	$5.83	$16.58		$16.58	$15.00		$6.39
China	L	0.248	0.078	0.326	0.210	0.007	0.217	0.001		0.544
	$	2.636	0.312	2.948	3.087	0.069	3.156	0.026		6.130
	$/L	$10.62	$4.01	$9.04	$14.71	$9.70	$14.54	$22.36		$11.26
Germany	L	0.345	0.074	0.419	0.110	0.001	0.111			0.530
	$	3.419	0.277	3.696	1.969	0.015	1.984			5.680
	$/L	$9.92	$3.73	$8.82	$17.97	$15.00	$32.97			$10.73
Others	L	2.450	0.620	3.069	0.586	0.010	0.596	0.116	0.001	3.782
	$	29.281	2.449	31.730	8.143	0.118	8.261	1.561	0.051	41.602
	$/L	$11.95	$3.95	$10.34	$13.89	$12.26	$13.86	$13.51	$61.08	$11.00
TOTAL	L	79.662	18.272	97.934	10.012	2.166	12.178	2.527	0.007	112.647
	$	755.938	72.911	828.848	128.784	9.957	138.742	23.948	0.183	991.721
	$/L	$9.49	$3.99	$8.46	$12.86	$4.60	$11.39	$9.48	$24.83	$8.80

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

NEW ZEALAND WINE EXPORTS BY VARIETY (2005-2009)

	2005	2006	2007	2008	2009
Cabernet or Merlot Blend	0.890	0.972	0.942	1.072	1.067
Cabernet Sauvignon	0.024	0.006	0.017	0.015	0.014
Chardonnay	4.578	4.011	4.230	5.541	4.789
Chardonnay Blend	0.011	0.014	0.010	0.159	0.208
Chenin Blanc	0.011	0.011	0.018	0.008	0.009
Fortified	0.031	0.040	0.038	0.026	0.030
Generic Red	0.118	0.771	0.252	0.082	0.035
Generic White	1.213	0.911	0.831	0.700	1.117
Gewürztraminer	0.111	0.126	0.162	0.131	0.146
Merlot	0.714	0.904	1.501	1.876	1.931
Müller Thurgau	0.003	0.006			
Other Red Varietals	0.092	0.097	0.107	0.089	0.049
Other White Varietals	0.142	0.438	0.179	0.039	0.081
Pinot Gris	0.254	0.255	0.608	1.256	2.036
Pinot Noir	2.673	4.151	5.882	5.703	6.183
Riesling	0.821	0.765	0.928	1.003	0.776
Rosé	0.307	0.597	1.144	0.963	0.704
Sauvignon Blanc	36.310	42.804	56.555	66.849	91.527
Sauvignon Blend	0.243	0.130	0.055	0.024	0.128
Semillon	0.059	0.055	0.009	0.013	0.003
Sparkling	2.556	2.290	2.283	2.064	1.976
Sweet Wines	0.057	0.056	0.078	0.043	0.034
Syrah/Shiraz		0.018	0.084	0.137	0.155
TOTAL	51.219	59.427	75.913	87.793	113.000

Note: All figures are in millions of litres

Source: Wine Export Certification Service. Data will differ slightly in total volume to those obtained through Statistics New Zealand

WINE IMPORTS INTO NEW ZEALAND (2000-2009)

BY COUNTRY OF ORIGIN	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Australia	20.655	21.331	25.091	32.363	27.636	24.340	27.250	36.497	22.412	20.019
Spain	2.475	1.377	0.195	0.362	0.708	0.404	0.393	0.494	0.486	0.493
Italy	1.886	2.445	3.270	1.105	1.380	1.632	1.614	1.850	2.312	1.523
Chile	1.085	2.423	4.565	2.594	2.319	0.668	1.038	0.953	2.593	0.858
France	1.012	0.726	1.101	1.241	1.220	0.903	1.132	1.157	1.990	1.872
Argentina	0.167	0.692	0.080	0.181	0.713	0.890	0.765	0.371	0.362	0.380
South Africa	0.190	0.408	7.159	6.172	9.648	6.151	3.385	0.768	10.414	7.594
Others	0.729	0.523	0.429	0.352	1.401	0.884	0.317	0.288	0.381	0.605
TOTAL	28.556	33.411	41.890	44.373	45.025	35.872	35.894	42.378	40.949	33.344
BY PRODUCT TYPE	**2000**	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**
White	10.881	13.692	18.686	18.803	23.160	16.328	17.108	21.251	17.014	11.312
Red	15.282	17.437	20.728	21.936	17.739	15.710	15.972	18.241	20.763	18.633
Sparkling	1.564	1.585	1.729	2.895	3.575	3.365	2.287	2.309	2.444	2.762
Champagne	0.386	0.197	0.236	0.290	0.385	0.376	0.415	0.438	0.609	0.559
Fortified	0.443	0.498	0.511	0.447	0.166	0.093	0.112	0.138	0.119	0.077
TOTAL	28.556	33.411	41.890	44.373	45.025	35.872	35.894	42.378	40.949	33.344

Note: All figures are in millions of litres

WINE IMPORTS INTO NEW ZEALAND (YEAR END JUNE 2009)

COUNTRY OF ORIGIN		WHITE	RED	SPARKLING	CHAMPAGNE	FORTIFIED	TOTAL
Australia	L	5.543	12.510	1.918		0.048	20.019
	$	21.528	64.230	9.869		1.113	96.740
South Africa	L	4.028	3.483	0.083			7.594
	$	7.004	6.435	0.419		0.003	13.860
Chile	L	0.302	0.555	0.001			0.858
	$	0.938	1.634	0.038			2.610
Italy	L	0.522	0.477	0.523		0.002	4.523
	$	2.646	3.432	4.730		0.085	10.894
France	L	0.482	0.721	0.109	0.559	0.001	1.872
	$	3.927	11.034	0.946	26.677	0.059	42.643
Spain	L	0.100	0.347	0.035		0.012	0.493
	$	0.425	2.021	0.256		0.639	0.340
Argentina	L	0.234	0.146	0.001			0.380
	$	0.277	0.657				0.935
Others	L	0.102	0.395	0.093		0.015	0.605
	$	1.148	0.919	0.623		1.075	3.766
TOTAL	L	11.312	18.633	2.762	0.559	0.077	33.344
	$	37.892	90.361	16.883	26.677	2.974	174.787

Note: All figures are in millions

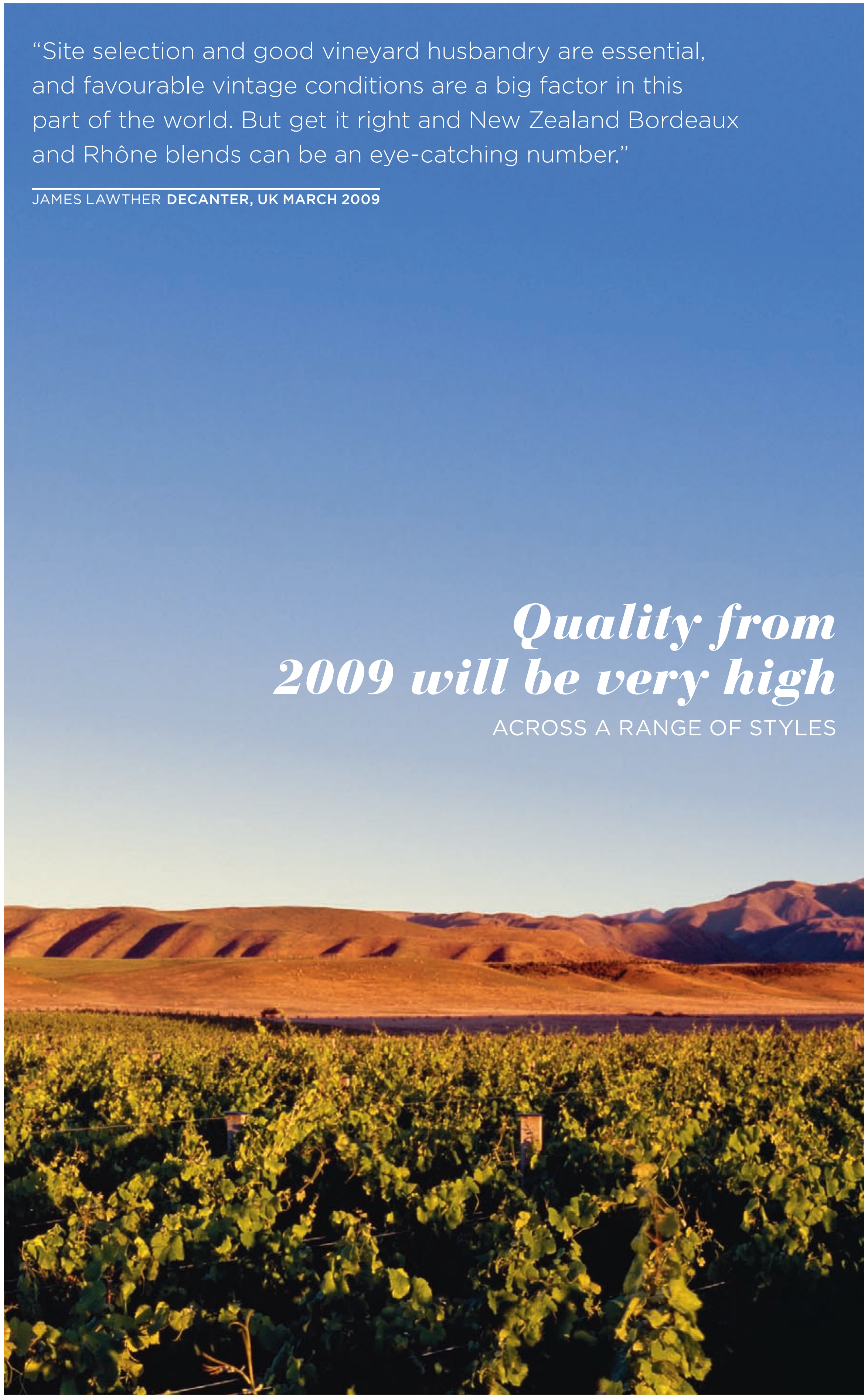
Source: Statistics New Zealand

"Site selection and good vineyard husbandry are essential, and favourable vintage conditions are a big factor in this part of the world. But get it right and New Zealand Bordeaux and Rhône blends can be an eye-catching number."

JAMES LAWTHER **DECANTER, UK MARCH 2009**

Quality from 2009 will be very high

ACROSS A RANGE OF STYLES



NEW ZEALAND WINE
PURE DISCOVERY

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