

New Zealand

Country Profile

June 2009

1. AREA UNDER VINES

The 2008 total New Zealand producing vineyard area of 28 577 ha represents a 16% increase on the national total of 2007 (24 721 ha). The major varieties being grown in 2008 are, in order of percentage of total production hectares; Sauvignon Blanc(48%), Pinot Noir (16%), Chardonnay (14%), Merlot (5%), Pinot Gris (5%), Riesling (3%) and Cabernet Sauvignon (2%).

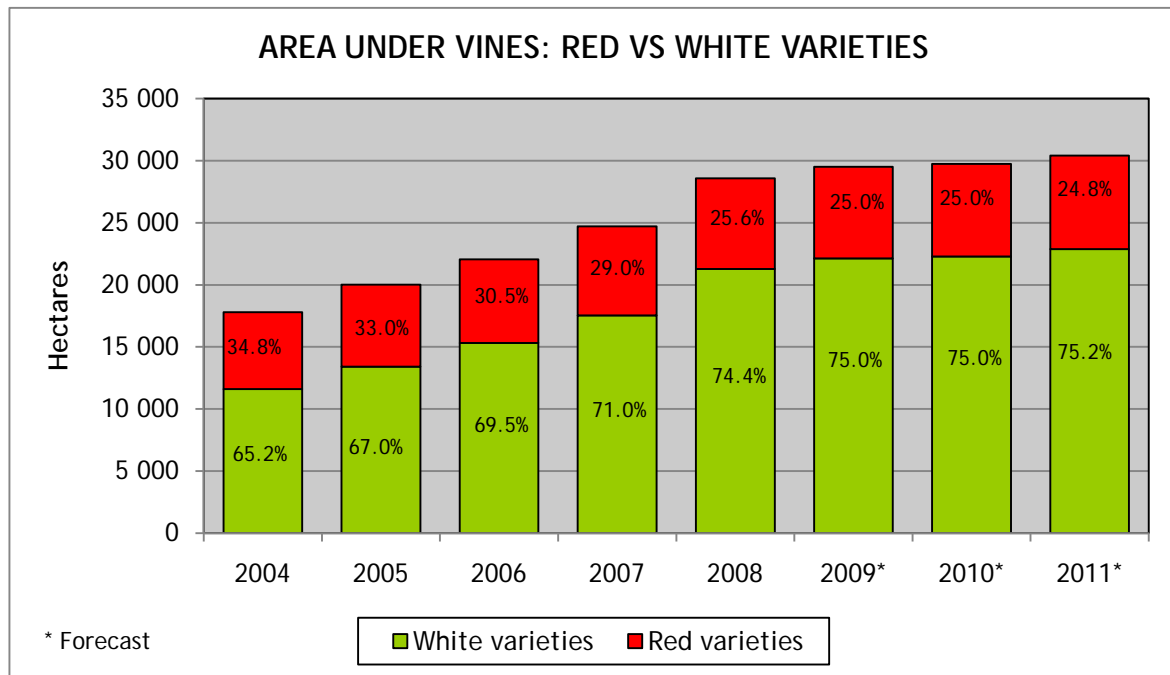
1.1 Total area under vines

Year	Producing Vine Area (Ha)
1998	7 580
1999	9 000
2000	10 197
2001	11 648
2002	13 787
2003	15 405
2004	17 809
2005	20 002
2006	22 051
2007	24 721
2008	28 577
2009*	29 504
2010*	29 732
2011*	30 397

* Forecast

Source: *New Zealand Winegrowers Statistical Annual*

1.2 Distribution of wine grape varieties



	2004	2005	2006	2007	2008	2009*	2010*	2011*
	Hectares							
White varieties								
Chardonnay	3 617	3 804	3 779	3 917	3 881	3 915	3 930	3 939
Chenin Blanc	72	58	59	50	50	47	48	48
Gewurztraminer	210	257	284	293	316	316	316	316
Muller Thurgau	155	137	117	106	79	78	78	78
Muscat Varieties	136	139	140	139	135	125	125	125
Pinot Gris	381	489	762	1 146	1 383	1 460	1 495	1 511
Reichensteiner	61	59	61	66	72	72	72	72
Riesling	666	811	853	868	917	928	934	940
Sauvignon Blanc	5 897	7 277	8 860	10 491	13 988	14 735	14 844	15 383
Semillon	306	240	229	230	199	183	181	181
Other	117	130	171	234	251	267	271	274
Total White	11 618	13 401	15 315	17 540	21 271	22 126	22 294	22 867
Red varieties								
Cabernet Franc	213	180	164	168	166	165	166	166
Cabernet Sauvignon	687	614	531	524	516	517	517	519
Malbec	168	163	155	160	156	157	157	160
Merlot	1 487	1 492	1 420	1 447	1 363	1 367	1 371	1 386
Pinotage	82	85	90	88	74	74	74	74
Pinot Noir	3 239	3 757	4 063	4 441	4 650	4 703	4 753	4 824
Syrah	183	211	214	257	278	290	294	294
Other	132	99	99	96	103	105	106	107
Total Red	6 191	6 601	6 736	7 181	7 306	7 378	7 438	7 530
TOTAL	17 809	20 002	22 051	24 721	28 577	29 504	29 732	30 397

* Forecast

Source: New Zealand Winegrowers Statistical Annual

2. PRODUCTION

Fine weather during flowering and favourable spring conditions in the more southerly regions resulted in a bumper crop of 285 000 tons of grapes - 39% more than the 2007 record. The quality also appears to be good.

Year	Grapes for the production of wine	Wine Production
	Tons	Million Litres
1998	78 300	60.6
1999	79 700	60.2
2000	80 100	60.2
2001	71 000	53.3
2002	118 700	89.0
2003	76 400	55.0
2004	166 000	119.2
2005	142 000	102.0
2006	185 000	133.2
2007	205 000	147.6
2008	285 000	205.2

Source: New Zealand Winegrowers Statistical Annual

3. CONSUMPTION

3.1 Total wine consumption

Wine consumption in New Zealand amounted to 87,4 million litres in 2008, showing a 4.8% decrease from 2007. 53.2% of these wine sales were represented by locally produced wine, compared to 55.5% in 2007.

Year	Wine consumption
	Million Litres
1999	63.1
2000	66.2
2001	66.6
2002	68.3
2003	74.5
2004	79.7
2005	81.7
2006	86.0
2007	91.8
2008	87.4

Source: *New Zealand Winegrowers Statistical Annual*

3.2 Per capita consumption

Year	Wine	Beer	Spirits	Total alcohol
	Litres		LAA	
1996	16.2	94.1	1.2	6.9
1997	17.0	84.1	1.0	6.4
1998	16.1	84.7	1.3	6.6
1999	16.3	80.7	1.3	6.4
2000	18.7	81.6	1.4	6.9
2001	17.9	78.6	1.6	6.9
2002	17.1	77.8	1.4	6.6
2003	18.1	72.8	1.6	6.7
2004	19.6	70.6	1.6	6.8
2005	20.6	68.5	1.7	6.9
2006	21.7	66.4	1.7	7.0

Source: *The Global Wine Statistical Compendium 1961-2006*

Please Note: Due to the Copyright and Licence Agreement between SAWIS and Euromonitor, access to the following Euromonitor statistics will only be available by emailing Lizelle Arendse, Information Officer at SAWIS (lizelle@sawis.co.za). Only South African Wine Industry role-players will gain access to these statistics. These statistics will be available in electronic - and hard copy.

4 CONSUMER EXPENDITURE ON ALCOHOLIC DRINKS

5 ALCOHOLIC DRINKS

5.1 Sales of alcoholic drinks by sector - Total volume

5.2 Sales of alcoholic drinks by sector - Total Value

5.3 Forecast sales of alcoholic drinks by sector - Total volume

5.4 Forecast sales of alcoholic drinks by sector - Total value

6 SALES OF WINE BY SUBSECTOR

6.1 Total volume

6.2 Total value

6.3 Forecast sales of wine by subsector - Total volume

6.4 Forecast sales of wine by subsector - Total value

7 SALES OF WINE BY PRICE SEGMENT

7.1 Red wine

7.2 White wine

7.3 Rosé wine

8 SALES OF WINE BY GRAPE/VARIETAL TYPE

8.1 Red wine

8.2 White wine

8.3 Rosé wine

9 DISTRIBUTION

9.1 Off-trade vs On-trade sales of wine - Total volume

9.2 Off-trade vs On-trade sales of wine - Total value

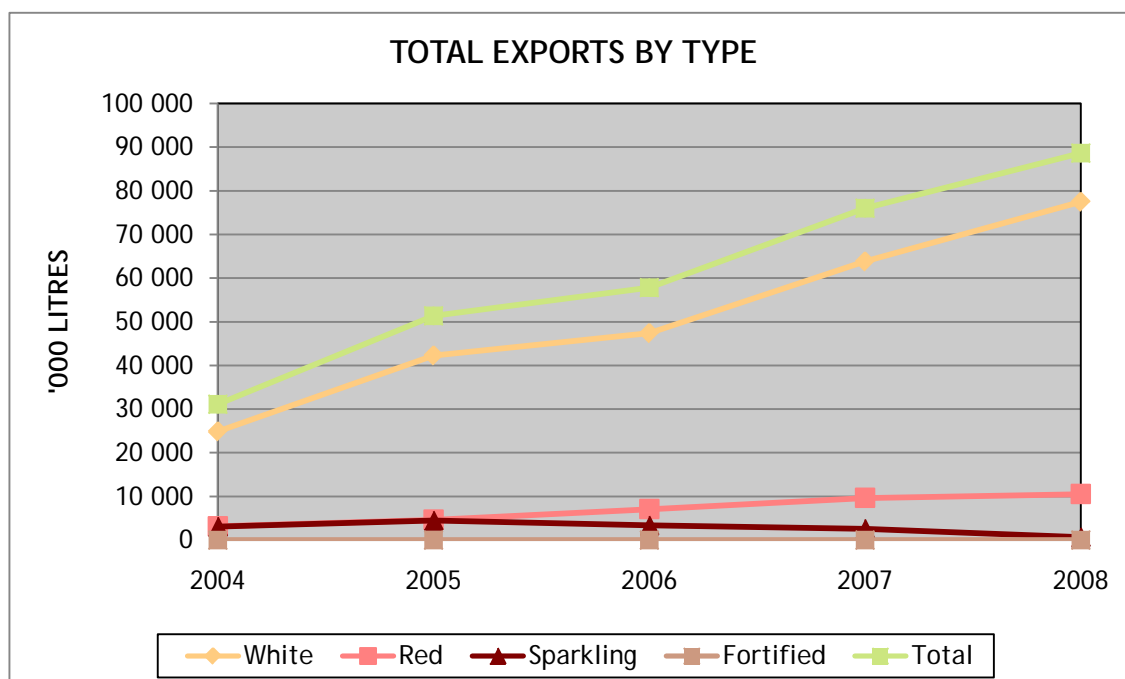
9.3 Off-trade sales of wine by distribution format: % analysis

10. INTERNATIONAL TRADE

10.1 Total exports

Year	Volume	Value
	'000 Litres	NZ\$ Million
1998	15 153	97.6
1999	16 618	125.3
2000	19 170	168.6
2001	19 245	198.1
2002	22 971	246.4
2003	27 114	281.8
2004	31 101	302.6
2005	51 373	434.9
2006	57 791	512.4
2007	76 024	698.3
2008	88 636	797.8

Source: New Zealand Winegrowers Statistical Annual



10.2 Exports by destination

In the UK, overall growth is focussed in the premium categories. New Zealand wine sales rose by 7.5% in volume while at the same time, the average retail price increased to £6.47 (£2.09 ahead of the nearest competitor). The Australian market continues to perform well, growing 37% to NZ\$247 million to make it New Zealand's largest market by value.

Countries		2003	2004	2005	2006	2007	2008
		'000 units					
UK	Litres	12 258	13 864	21 124	21 907	27 573	29 646
	NZ\$	113 729	119 786	162 120	166 937	227 418	240 730
USA	Litres	5 578	7 266	12 975	14 411	18 712	19 492
	NZ\$	67 390	80 026	113 237	138 411	175 515	159 787
Australia	Litres	4 661	5 654	9 762	13 180	18 632	24 633
	NZ\$	51 621	56 285	88 033	122 441	179 933	246 696
Canada	Litres	988	700	1 477	2 061	3 182	5 219
	NZ\$	10 351	6 934	13 907	21 888	33 870	47 060
Netherlands	Litres	525	487	1 716	1 217	1 559	1 363
	NZ\$	5 058	4 404	12 688	10 017	13 318	12 808
Ireland	Litres	423	461	573	844	853	1 496
	NZ\$	4 141	4 307	5 200	8 158	8 920	15 012
Denmark	Litres	460	443	527	508	654	654
	NZ\$	4 524	4 019	4 608	4 656	6 029	5 836
Japan	Litres	326	426	491	406	484	545
	NZ\$	4 423	5 967	5 903	5 855	6 665	7 299
Germany	Litres	220	175	307	301	382	462
	NZ\$	2 900	2 446	3 289	2 914	3 699	5 342
Others	Litres	1 490	2 067	2 948	3 464	3 993	5 126
	NZ\$	17 699	22 443	30 479	35 742	42 935	57 227
TOTAL	Litres	27 114	31 101	51 373	57 791	76 024	88 636
	NZ\$	281 838	302 599	434 856	512 362	698 303	797 797

Source: New Zealand Winegrowers Statistical Annual

10.3 Exports by destination and type (2008)

Countries		White	Red	Sparkling	Fortified	Total
UK	Litres	25 010 348	4 315 194	320 775	9	29 646 326
	NZ\$	196 160 131	42 2002 239	2 368 408	820	240 729 598
USA	Litres	17 602 447	1 866 650	22 649	91	19 491 837
	NZ\$	138 156 001	21 316 978	304 330	9 808	159 787 117
Australia	Litres	22 653 074	1 800 135	179 789	15	24 633 013
	NZ\$	218 724 028	25 783 829	2 186 825	987	246 695 669
Canada	Litres	4 572 335	635 494	7 448	3 465	5 218 742
	NZ\$	37 864 069	9 032 617	85 668	77 507	47 059 861
Netherlands	Litres	1 155 994	187 919	19 548	-	1 363 461
	NZ\$	10 338 774	2 290 689	178 815	-	12 808 278
Ireland	Litres	1 282 796	211 922	972	-	1 495 690
	NZ\$	12 545 247	2 452 599	14 580	-	15 012 426
Denmark	Litres	564 010	89 114	387	-	653 511
	NZ\$	4 492 659	133 474	6 113	-	5 836 246
Japan	Litres	349 893	194 631	871	-	545 395
	NZ\$	4 250 824	3 028 163	20 016	-	7 299 003
Germany	Litres	337 523	124 643	189	-	462 355
	NZ\$	3 325 554	2 010 855	5 214	-	5 341 623
Others	Litres	3 920 863	1 097 669	103 547	3 239	5 125 318
	NZ\$	41 587 266	14 203 655	1 313 954	122 100	57 226 975
TOTAL	Litres	77 449 283	10 523 371	656 175	6 819	88 635 648
	NZ\$	667 444 553	123 657 098	6 483 923	211 222	797 796 796

Source: New Zealand Winegrowers Statistical Annual

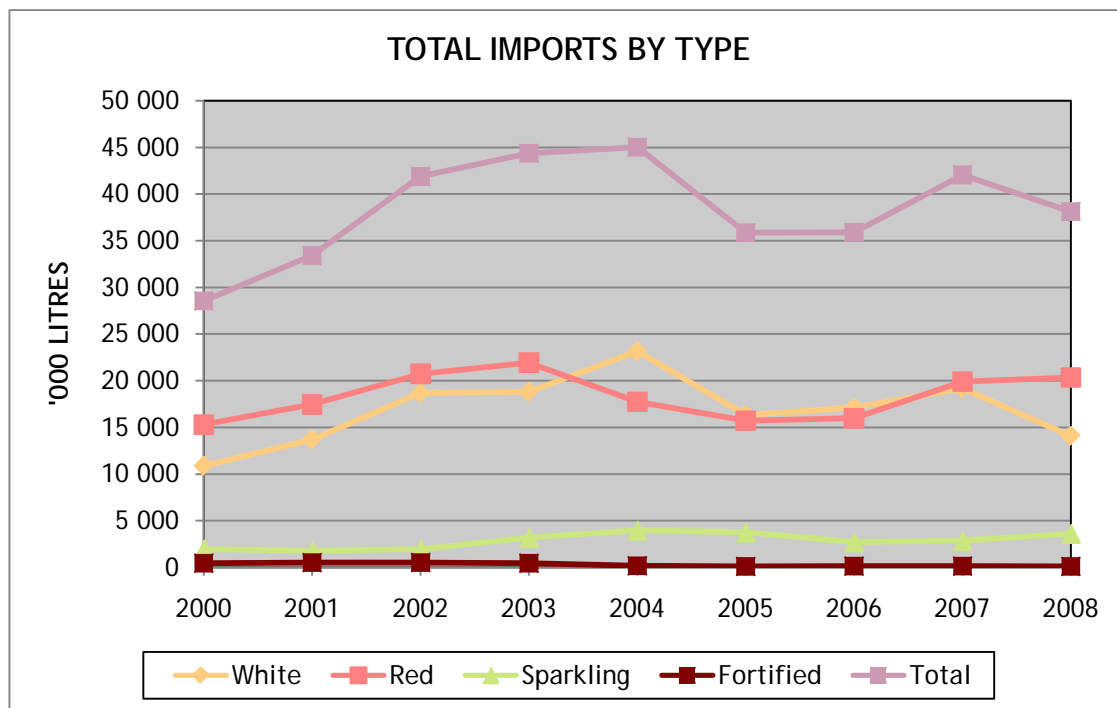
10.4 Imports by type (year end December)

Total imports decreased by 9.3% to 38,1 million litres in 2008. This is mainly due to a 26.6% decrease in white wine imports, which amounted to 14,1 million litres compared to 19,2 million litres in 2007.

Year	White	Red	*Sparkling	Fortified	Total
	'000 Litres				
1998	13 739	12 563	1 324	605	28 231
1999	11 530	13 936	1 779	607	27 853
2000	10 881	15 282	1 950	443	28 556
2001	13 692	17 437	1 782	500	33 411
2002	18 686	20 728	1 965	511	41 890
2003	18 803	21 936	3 185	447	44 371
2004	23 160	17 739	3 960	166	45 025
2005	16 328	15 710	3 741	93	35 872
2006	17 108	15 972	2 702	114	35 896
2007	19 172	19 890	2 866	129	42 057
2008	14 081	20 343	3 596	106	38 126

* Sparkling wine includes Champagne

Source: <http://www.nzwine.com/statistics/imports>



10.5 Imports by country (year end December)

Countries	2002	2003	2004	2005	2006	2007	2008
	000' Litres						
Australia	25 091	32 363	27 636	24 340	27 250	30 740	19 711
South Africa	7 159	6 172	9 648	6 151	3 385	5 076	10 495
Italy	3 270	1 105	1 380	1 632	1 614	2 076	1 977
Chile	4 565	2 594	2 319	668	1 038	1 547	1 955
France	1 101	1 241	1 220	903	1 132	1 506	2 415
Spain	195	362	708	404	393	451	526
Argentina	80	181	713	89	765	258	407
Others	429	352	1 401	884	317	403	640
Total	41 890	44 373	45 025	35 872	35 894	42 057	38 126

Source: <http://www.nzwine.com/statistics/imports>

11. PRICES

	2004	2005	2006	2007	2008
	Average price per ton - NZ\$				
<u>White varieties</u>					
Breidecker	548.53	590.35	1 493.31	1 000.00	1 000.00
Chardonnay					
-Mendoza & Clone 15	1 550.96	1 359.99	1 473.04	1 448.26	1 532.59
-Clones 4 & 5	1 142.18	1 235.41	1 053.32	1 164.14	1 470.81
-All other clones	1 504.4	1 409.29	1 503.73	1 448.11	1 586.89
Chenin blanc	661.41	513.10	732.91	719.56	964.12
Gewurztraminer	1 729.46	1 911.47	2 072.22	2 036.30	2 196.06
Muller Thurgau	545.48	515.52	499.33	556.56	589.53
Muscat varieties	575.77	507.75	540.18	559.87	577.28
Pinot Gris	2 150.81	2 470.62	2 363.95	2 218.28	2 122.32
Reichensteiner	553.50	530.03	585.84	591.64	640.53
Riesling	1 727.23	1 827.59	1 739.07	1 907.18	1 852.19
Sauvignon blanc	2 208.40	2 163.66	2 300.05	2 303.59	2 322.30
Semillon	1 285.89	1 266.37	1 311.67	1 324.02	1 450.86
<u>Red varieties</u>					
Blauburger	464.39	404.08	449.00	-	-
Cabernet Franc	1 959.03	1 723.00	1 870.90	1 651.71	2 067.50
Cabernet Sauvignon	1 933.68	1 845.54	1 772.87	1 866.04	1 929.71
Malbec	1 860.26	1 767.91	1 637.97	1 649.67	1 719.05
Merlot	1 933.62	2 339.98	1 644.45	1 603.98	1 769.47
Pinotage	1 284.04	1 270.33	1 099.89	1 202.41	1 280.99
Pinot Noir (Sparkling)	1 165.84	1 030.31	1 047.15	1 015.68	1 085.07
Pinot Noir (Table)	2 647.10	2 450.53	2 807.02	2 932.40	3 056.51
Syrah	2 157.55	2 181.14	2 106.78	2 026.68	2 213.56

Source: *New Zealand Winegrowers Statistical Annual*

12. STRUCTURE OF INDUSTRY

The industry comprise of a few medium sized to large producers, and many small boutique producers. In 2008 there were a total of 585 wineries of which 56 were medium sized and 6 were large producers.

Number of Wineries				
Year	Annual sales not exceeding 200 000 litres	Annual sales between 200 000 & 4 000 000 litres	Annual sales exceeding 4 000 000 litres	Total
1999	313	17	4	334
2000	331	23	4	358
2001	353	24	3	380
2002	369	26	3	398
2003	388	30	3	421
2004	425	34	4	463
2005	466	44	6	516
2006	482	42	6	530
2007	483	51	9	543
2008	523	56	6	585

Source: *New Zealand Winegrowers Statistical Annual*