NEW ZEALAND WINE
OVERVIEW, REGIONS & VARIETIES
NEW ZEALAND WINE

<1% OF TOTAL WORLD WINE PRODUCTION VOLUME

36°-46° SOUTH
GRAPE GROWING LATITUDINAL RANGE

94+% OF NEW ZEALAND VINEYARD AREA OPERATES UNDER INDEPENDENTLY AUDITED SUSTAINABILITY PROGRAMMES
A LAND LIKE NO OTHER...

- Tucked away in a remote corner of the globe
- Glorious, unspoilt landscapes - clean and green
- There are no nuclear power stations. New Zealand relies on renewable energy sources for 70% of its power with a goal of 90% by 2025
- No polluting landmass nearby
- About 1,500 km long
- Population: Human - 4.5 million / Sheep - 39 million!
- North Island - Sub-tropical climate
- South Island - Continental climate
- Maritime Climate - Furthest point inland is just 130km to the sea
- The Southern Alps provide a barrier from the rain from Australia
A VERY ‘NEW’ NEW WORLD WINE COUNTRY

- Significant plantings of vines only really started in the 1970’s
- Marlborough was sheep grazing land just 30 years ago
- The cool maritime climate of New Zealand and the diversity of incredible soils fascinated winemakers
- In 2014 there are still just over 700 wineries, 90% of which export to international markets
The key to producing such a wide range of distinctive wines...

- Great Terroir:
  - Climate
  - Soils
  - People
CLIMATE

- 1,600km away from the nearest landmass
- Coastal vineyards in rain shadow
- Long sunshine hours (average 2,200 annually)
- Sea breezes and cool nights
- Long ripening periods, develops great acidity and fruit balance
- Wine regions span latitudes of 36 and 46 degrees
SOILS

- Young and volcanic
- Youth of the land means New Zealand has an enormous variety of soils, still in the throes of being weathered by climate and vegetation
- Wine regions mainly established on young soils (most are less than 10,000 years old) of silt, sand, gravel and stonier alluvial soils, deposited by flowing water across the coastal flood plains
PEOPLE

- Not bound by tradition
- Young and dynamic
  - From mid 1970’s
- Innovative
  - Trellississing and canopy management
  - Screwcap closure
- Quality focussed
  - Premium image and price
- Environmentally focussed
  - World leading sustainability programme
1819  First vines planted in Northland
1840  James Busby produces New Zealand’s first wine at Waitangi
1840’s New immigrants from Europe arrive and set up vineyards in Canterbury and Nelson
1895  New Zealand government commissions a report on the prospects of winegrowing in New Zealand encouraging a rush to plant vines
1900’s New Zealand government invests in research, viticulture and phylloxera resistant vines
1900’s Total area under vine is 387 hectares, producing 4.1 million litres
1950’s New immigrants from Europe arrive and enthusiasm for food and wine increases
1970’s The demand for quality wine increases and many hybrid vines are replaced with classical varieties that are grafted to phylloxera resistant rootstock
HISTORY OF WINEMAKING TIMELINE

1973  Montana sets up in Marlborough and this region becomes the largest grape growing area of New Zealand with Sauvignon Blanc as a premium variety

1980’s  The New Zealand wine industry begins to promote itself overseas

1990’s  130 registered wineries with total vineyard area of 6,000 hectares and total production of 57.7 million litres. New Zealand wines achieve export success in Europe, the USA and Asia

1994  64% of all wine exports are to the UK

2000’s  358 registered wineries, area under vine has doubled within 10 years

2001  Screwcap initiative launched to promote and educate producers on the benefits of screwcap closure as a quality alternative to cork

2002  New Zealand exports to the UK, the USA and Australia reach over NZ$200 million

2014  699 registered wineries with the total production 320 million litres and exports at NZ$1.3 billion in value
WINE CLOSURES

• Cork has been the most common means of stoppering wine for centuries
• Screwcaps provided an alternative means of sealing wines
• In 2001, the Screwcap Wine Seal Initiative was set up in New Zealand
• Over 90% of New Zealand wines are under screwcaps
• Screwcaps are user friendly, easy to open and easy to reseal
• Screwcaps are far more resistant to damage caused by fluctuating temperatures
• Screwcaps remove the risk of cork taint and eliminate the risk of the wine oxidising under a faulty cork
• Early drinking wines retain their freshness for longer under screwcaps
• Wines that require cellaring will still age, however, ageing may take longer under screwcap
REGIONS

- Northland
- Auckland
- Waikato & Bay of Plenty
- Gisborne
- Hawke’s Bay
- Wairarapa
- Nelson
- Marlborough
- Canterbury & Waipara Valley
- Central Otago
PRODUCING VINEYARD AREA
(TOTAL PRODUCING HECTARES, 35,510)*

- MARLBOROUGH (22,907)
- HAWKE'S BAY (4,774)
- CENTRAL OTAGO (1,932)
- GISBORNE (1,915)
- CANTERBURY & WAIPARA VALLEY (1,448)
- NELSON (1,123)
- WAIRARAPA (995)
- AUCKLAND & NORTHLAND (392)

(NOT SHOWN)
- WAIKATO/BAY OF PLENTY (25)

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014
KEY VARIETIES
(TOTAL PRODUCING HECTARES, 35,510)*

- **SAUVIGNON BLANC** (20,029)
- **PINOT NOIR** (5,509)
- **AROMATIC VARIETIES**
  - PINOT GRIS (2,451)
  - RIESLING (784)
  - GEWÜRZTRAMINER (376)
- **CHARDONNAY** (3,346)
- **MERLOT, CABERNET & SYRAH**
  - MERLOT (1,290)
  - CABERNET SAUVIGNON (289)
  - SYRAH (433)
- **OTHER** (1,003)

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014*
SUSTAINABILITY POLICY

- Under New Zealand Winegrowers’ Sustainability Policy, wine must be made from 100% certified grapes in winemaking facilities that are independently audited and certified.
- Over 94% of vineyard area in New Zealand is operating under this independently audited sustainability programme, demonstrating a commitment to quality.

- Biodiversity
- Soil, water and air
- Energy
- Chemicals
- By-products
- People
- Business practices
NEW ZEALAND WINE VARIETIES
<table>
<thead>
<tr>
<th><strong>SAUVIGNON BLANC</strong></th>
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<tbody>
<tr>
<td><strong>310</strong></td>
</tr>
<tr>
<td>TOTAL PRODUCTION (000 TONNES, 2014)^</td>
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</table>

^SOURCE: New Zealand Winegrowers Annual Report 2014
SAUVIGNON BLANC
(TOTAL PRODUCING HECTARES, 20,029)*

BREAKDOWN OF PLANTINGS BY REGION
PRODUCING HECTARES (2014)*

- MARLBOROUGH (17,725)
- HAWKE'S BAY (937)
- NELSON (540)
- CANTERBURY & WAIPARA VALLEY (386)
- WAIRARAPA (318)
- GISBORNE (56)
- CENTRAL OTAGO (45)
- AUCKLAND & NORTHLAND (22)
  (NOT SHOWN)
- WAIKATO & BAY OF PLENTY (0.8)

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014
SAUVIGNON BLANC

UNIQUE, EXUBERANT, INTENSE

- Pungently aromatic, vividly pure fruit, herbaceous and exotically tropical plus mineral depths
- Red capsicum (bell pepper) and gooseberry characters through lush passionfruit and tropical fruit overtones
- Other notes include fresh cut grass, tomato stalks, grapefruit or limes

VITICULTURE

- Open leaf canopy allows sunlight to reach the fruit, giving full ripeness and flavour concentration
- Techniques to ensure open canopy include trellising, leaf plucking and shoot thinning
-Trimming is also used to control the natural vine vigour and to ensure the vines focus on fruit ripening

WINEMAKING INFLUENCES

- Majority of wines are cold fermented in stainless steel tanks to optimise freshness and pungent fruit flavours
- Oak fermentation and subsequent maturation on the yeast lees add complexity, richness and longevity to the wine, and are increasingly more popular
NEW ZEALAND WINE REGIONS
<table>
<thead>
<tr>
<th>Area</th>
<th>Total Producing Hectares (2014)*</th>
<th>Total Production (000 Tonnles, 2014)^</th>
<th>Proportion of Total NZ Production (Tonnes, 2014)^</th>
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<tbody>
<tr>
<td>CENTRAL OTAGO</td>
<td>1,932</td>
<td>10.5</td>
<td>2.4%</td>
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</table>

CENTRAL OTAGO – KEY VARIETIES

REGIONAL OVERVIEW: PLANTINGS & STYLES

PRODUCING HECTARES (2014)*

CHARDONNAY
52ha
Citrus and mineral characters, tightly structured, fine-bodied and sophisticated; can be reserved when young but unfold with great complexity and elegance.

SAUVIGNON BLANC
45ha
Mineral and gunflint with herbaceousness overlain by pineapple and passionfruit. Crisp linear structure, refreshing acidity and dry, stony finishes are hallmarks.

AROMATICS
330ha
PINOT GRIS - 226ha
RIESLING - 86ha
GEWURZTRAMINER - 18ha
Riesling stands out; plus smart Pinot Gris and Gewürztraminer. Styles range from austerely dry to decadently sweet but always sparkling fruit and precise structure.

PINOT NOIR
1,484ha
Flagship variety whose reputation increases as the region and its vines mature. Fragrant, lush fruit underpinned by taut structure, silky texture and true intensity. There are marked differences in sub-regional styles.

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014. Figures include all Otago.
CANTERBURY & WAIPARA VALLEY

1,448
TOTAL PRODUCING HECTARES (2014)*

11
TOTAL PRODUCTION (000 TONNES, 2014)^

2.6%
PROPORTION OF TOTAL NZ PRODUCTION (TONNES, 2014)^

IMAGE: Lake Forsyth Vineyard
CANTERBURY & WAIPARA VALLEY – KEY VARIETIES

REGIONAL OVERVIEW: PLANTINGS & STYLES
PRODUCING HECTARES (2014)*

PINOT NOIR
416ha
Ranging from perfumed and pretty to dark and brooding, the long growing season gives wines of finesse and depth, with supple structure and good complexity.

CHARDONNAY
83ha
Widely planted across the region and made in a range of styles; wines have good structure and body, finely poised acidity and rich citrussy fruit.

SAUVIGNON BLANC
386ha
Aromatic with crisp, fresh acidity and a mineral core, wines show clear, juicy fruit and lovely texture with good weight.

AROMATICS
502ha
RIESLING - 300ha
PINOT GRIS - 202ha
Abundant, bright fruit. Encompassing dry to dessert styles, Riesling’s already long, illustrious history is continuously improved upon. Pinot Gris has made an impressive debut.

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014
<table>
<thead>
<tr>
<th>MARLBOROUGH</th>
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<tbody>
<tr>
<td>TOTAL PRODUCING HECTARES (2014)*</td>
<td>22,907</td>
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<tr>
<td>TOTAL PRODUCTION (000 TONNES, 2014)^</td>
<td>330</td>
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<td>PROPORTION OF TOTAL NZ PRODUCTION (TONNES, 2014)^</td>
<td>77%</td>
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MARLBOROUGH – KEY VARIETIES

REGIONAL OVERVIEW: PLANTINGS & STYLES
PRODUCING HECTARES (2014)*

CHARDONNAY
1,038ha
From all the bells and whistles to unoaked styles, Marlborough produces well structured Chardonnay with excellent intensity and complexity. Stonefruit and citrus abound.

AROMATICS
1,386ha
PINOT GRIS - 968ha
RIESLING - 309ha
GEWÜRZTRAMINER - 92ha
VIOGNIER - 17ha
Riesling, Pinot Gris and Gewürztraminer reflect the region’s purity and vivacity. Styles range from dry to sweet, taut to lush, including late harvest and botrytised wines.

SAUVIGNON BLANC
17,725ha
Pungently aromatic, vividly pure fruit, herbaceous and exotically tropical, plus mineral depths, Marlborough Sauvignon Blanc is an international brand in its own right.

PINOT NOIR
2,492ha
Going from strength to strength as committed growers refine both clones and sites. Displays dark cherry and plums with a red fruited spicy background, mid-weight, fine tannins.

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014
1. Cloudy Bay, Marlborough 2014
NELSON

<table>
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<th>1,123</th>
<th>10.5</th>
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<tr>
<td>TOTAL PRODUCING HECTARES (2014)*</td>
<td>TOTAL PRODUCTION (000 TONNES, 2014)^</td>
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</table>

NELSON – KEY VARIETIES

REGIONAL OVERVIEW: PLANTINGS & STYLES
PRODUCING HECTARES (2014)*

CHARDONNAY
93ha
Depth, elegance and complexity are hallmarks of the best Nelson Chardonnay and the fruit is remarkably pure and intense. Top wines have great longevity.

AROMATICS
209ha
PINOT GRIS - 139ha
RIESLING - 44ha
GEWÜRZTRAMINER - 26ha
Riesling, Pinot Gris and Gewürztraminer are expressive and fine with poised acidity and rich flavours. The climate allows for a variety of styles.

SAUVIGNON BLANC
540ha
A more elegant, restrained expression of this variety, displaying lovely texture and minerality alongside crisp, vivacious tropical fruit with fresh herbal nuances.

PINOT NOIR
241ha
Whether weighty in Moutere or pretty in Waimea, Nelson Pinot is always expressive and perfumed, with fine, ripe tannins and complex depths.

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014
<table>
<thead>
<tr>
<th></th>
<th>Wairarapa &amp; Martinborough</th>
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<tbody>
<tr>
<td><strong>Total Producing Hectares (2014)</strong></td>
<td>995</td>
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<td><strong>Total Production (000 Tonnes, 2014)</strong></td>
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<td><strong>Proportion of Total NZ Production (Tonnes, 2014)</strong></td>
<td>1.3%</td>
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WAIRARAPA & MARTINBOROUGH – KEY VARIETIES

REGIONAL OVERVIEW: PLANTINGS & STYLES
PRODUCING HECTARES (2014)*

SYRAH
9ha
Emerging and showing great promise. Elegant, perfumed with a backbone of spice, Syrah looks to replace the climatically trickier Cabernet and Merlot blends.

AROMATICS
97ha
PINOT GRIS - 62ha
GEWÜRZTRAMINER - 3ha
RIESLING - 32ha
Riesling, Pinot Gris and Gewürztraminer are all successful with the long growing season also allowing for late harvest and botrytised styles. Stylish Viognier also impresses.

PINOT NOIR
500ha
The region’s flagship red; richly flavoured and warm with a savoury undercurrent whilst retaining perfumed varietal character. Wairarapa Pinots offer texture and depth.

SAUVIGNON BLANC
318ha
The region’s best kept secret. Intense and vivid with excellent perfume and poised, mineral textural palates. Good mix of herbaceous and tropical characters.

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014
2. Craggy Range, Martinborough  2014
4. Greywacke Wild, Marlborough 2013
HAWKE’S BAY

4,774
TOTAL PRODUCING
HECTARES (2014)*

45
TOTAL PRODUCTION
(000 TONNES, 2014)^

10%
PROPORTION OF TOTAL
NZ PRODUCTION
(TONNES, 2014)^

HAWKE’S BAY – KEY VARIETIES

REGIONAL OVERVIEW: PLANTINGS & STYLES

PRODUCING HECTARES (2014)*

SAUVIGNON BLANC

937ha

Rich, tree fruit-laden wines, underpinned by bright acidity, they often seen a degree of oak fermentation or maturation, adding complexity and body.

PINOT GRIS

439ha

Aromatic, spicy, bold ripe wines with balanced acidity and good body, retaining excellent varietal character and freshness.

CHARDONNAY

1,006ha

Flagship white variety with excellent fruit intensity and complexity. Wines are full-bodied, lengthy, almost oolent but with finely-tuned acidity balancing the richness.

SYRAH

332ha

An exciting variety showing great distinction, gaining strength as sites and clones are refined. Wines are perfumed, elegant with ripe fruit, supple tannins and lingering spice.

OTHER STYLES

Excellent examples abound of other aromatic whites such as Viognier, Malbec, Tempranillo and experimental plantings of Italian and Spanish varieties suggesting Hawke’s Bay offers many future stand-outs.

REDs

1,424ha

MERLOT - 1,080ha

CABERNET SAUVIGNON - 249ha

MALBEC - 95ha

Red Blends are highly successful, producing wines of great power, elegance and longevity. Merlot is increasingly the higher percentage in blends, offering rich, plummy depths.

PINOT NOIR

Note: there is much Pinot Noir planted in Hawke’s Bay (311ha), but the vast majority of this is used for Sparkling wine.

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014
5. &Co “The Green Glow”, Hawke’s Bay 2013
6. Trinity Hill, Hawke’s Bay 2013
7. Pegasus Bay Semillon/Sauvignon, Waipara Valley 2012
8. Brancott Estates Chosen Rows, Marlborough 2010
9. Seresin Reserve, Marlborough 2009
<table>
<thead>
<tr>
<th>GISBORNE</th>
<th>1,915</th>
<th>16</th>
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<tr>
<td>TOTAL PRODUCING HECTARES (2014)*</td>
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GISBORNE – KEY VARIETIES

REGIONAL OVERVIEW: PLANTINGS & STYLES

PRODUCING HECTARES (2014)*

SAUVIGNON BLANC
56ha
Very tropical, ripe and bold styles with broad palates though early picked styles can be lighter, herbaceous and zesty.

CHARDONNAY
936ha
Highly aromatic, with rich, lush palates bursting with fruit. Delicious simple early-drinking styles a specialty, though the top, most intense wines have real longevity.

MERLOT
103ha
Can be challenging in the climate but drier years give fleshy, flavoursome reds. Other heavier red varieties such as Malbec enjoy success in carefully chosen sites.

AROMATICS
622ha
PINOT GRIS - 381ha
GEWÜRZTRAMINER - 157ha
VIognier - 84ha
Gewürztraminer a highlight with well-textured, strongly aromatic, spicy wines; some excellent perfumed Riesling and Chenin Blanc; promising Pinot Gris and Viognier.

OTHER STYLES
Sparkling wines successful (home to Lindauer Cellars); Semillon does well. Pinot Noir, Pinotage, fortified and dessert styles also standout amongst an eclectic selection.

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014
<table>
<thead>
<tr>
<th></th>
<th><strong>AUCKLAND</strong></th>
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<tbody>
<tr>
<td><strong>TOTAL PRODUCING HECTARES</strong></td>
<td><strong>348</strong></td>
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<td><strong>TOTAL PRODUCTION (000 TONNES, 2014)</strong></td>
<td><strong>1.3</strong></td>
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<td><strong>PROPORTION OF TOTAL NZ PRODUCTION (TONNES, 2014)</strong></td>
<td><strong>0.3%</strong></td>
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AUCKLAND – KEY VARIETIES

REGIONAL OVERVIEW: PLANTINGS & STYLES
PRODUCING HECTARES (2014)*

**SYRAH**
48ha
Sophisticated, intense wines flow from Waiheke Island where the excitement is building about its aromatic, elegant, pure-fruited expression of the variety.

**CHARDONNAY**
64ha
Varying styles of weighty, ripe wines with tropical flavours and fresh, balanced acidity are common throughout the region; Kumeu sees the variety reach a refined zenith.

**PINOT GRIS**
30ha
Grown throughout the regions but particularly strong in Matakana, which produces fleshy, weighty wines with spicy, ripe stonefruit and pear aromas and flavours.

**REDS**
121ha
- MERLOT - 46ha
- CABERNET SAUVIGNON - 30ha
- CABERNET FRANC - 23ha
- MALBEC - 17ha
- PETIT VERDOT - 5ha

Stylish Red Blends are common throughout the regions; Merlot generally performs best on the heavier soils. Dense yet elegant, commanding acclaim and frequently very high prices.

*SOURCE: New Zealand Winegrowers Vineyard Register Report 2014*
THE FUTURE

70% of vines in New Zealand are less than 12 years old.

With maturing vines, optimum site selection for new plantings, and continued fine turning of vineyard and winemaking techniques, you can be sure….
The best is yet to be