



*New Zealand Wine*  
the riches of a clean green land

**New Zealand has long been famed** for its stunning, unspoiled landscape. Equal to the international acclaim for its beauty is that for its fine wines. Climate, geography and human skill have combined to produce highly distinctive, premium quality wines, which are 'the riches of a clean, green land.'

### **International acclaim**

New Zealand Sauvignon Blanc is rated throughout the world as the definitive benchmark style for this varietal. The growing recognition for New Zealand Chardonnay, Pinot Noir, Méthode Traditionelle sparkling wines, Riesling, Cabernet Sauvignon and Merlot blends is helping to further cement New Zealand's position as a producer of world class wines.

### **Diverse styles**

New Zealand is a country of contrasts with dense, native forest, snow-capped mountains and spectacular coastline. With wine growing regions spanning the latitudes of 36 to 45 degrees and covering the length of 1000 miles (1,600km), grapes are grown in a vast range of climates and soil types, producing a diverse array of styles. The northern hemisphere equivalent would run from Bordeaux (between the latitudes of 44 and 46 degrees) down to southern Spain.

### **Temperate maritime climate**

New Zealand's temperate, maritime climate has a strong influence on the country's predominantly coastal vineyards. The vines are warmed by strong, clear sunlight during the day and cooled at night by sea breezes. The long, slow ripening period helps to retain the vibrant varietal flavours that make New Zealand wine so distinctive. Central Otago is the exception, in that it has a true continental climate, this is what makes it so unique as a New Zealand wine producing region.

### **Food friendly wines**

New Zealand cuisine draws inspiration from the traditional kitchens of France and Italy, as well as the exotic dishes of Asia and the Pacific Rim. Wine styles have evolved to compliment this extensive menu. There are bright and zesty wines such as Sauvignon Blanc and Riesling for fresh and subtly spiced dishes, while complex, mellow Chardonnay, Cabernet Sauvignon/Merlot blends and Pinot Noir offer a timeless marriage with the classical dishes of Europe.

### **Ensuring the future**

New Zealand's small population, distant location and agricultural economy have earned the country a 'clean, green' image. Visitors often describe it as 'an unspoiled paradise'. New Zealand's winemakers are determined to keep it this way. Innovative practices in the vineyard and winery, which deliver quality in a sustainable and environmental manner, ensure that New Zealand meets a growing world demand for wines that have been produced in a 'clean and green' fashion.

## HIGHLIGHTS 2002/03

### New Zealand Named 'Wine Region Of The Year'

Prominent US wine publication, Wine Enthusiast Magazine, selected New Zealand as the Wine Region of the Year for 2002, attributing the industry's innovation, consistency, diversity and value as the basis for this exemplary award. In total, fifty contenders were nominated for the magazine's seven coveted wine and spirits industry honours.

### Vintage 2003: Focus on Quality

New Zealand Winegrowers estimates grape growers and winemakers harvested 76,400 tonnes of grapes in 2003, 42,300 tonnes or 35% down on the previous year.

While all varieties experienced a decline in production in 2003, some varieties were much less affected by the production downturn than others. In particular, the crops of Pinot Noir and Sauvignon Blanc, while below last year's record levels, are still the second largest ever harvested by the industry.

### Export Sales Continue Upward Trend

New Zealand wine exports continue their strong upward trend. For June Year End 2003 exports totalled \$282 million from shipments of 27 million litres. This is an increase of 18% in volume and 14% in value over the past twelve months.

## KEY STATISTICS

### Summary - New Zealand Wine (1998 - 2003)

	1998	1999	2000	2001	2002	2003
Number of Wineries	293	334	358	382	398	421
Total Vine Area (hectares)	9,780	11,275	12,822	15,829	18,247	19,432
Producing Area (hectares)	7,580	9,000	10,197	11,648	13,787	15,479
Average Yield (tonnes per hectare)	10.3	8.9	7.9	6.1	8.6	4.9
Tonnes Crushed	78,300	79,700	80,100	71,000	118,700	76,400
Total Production (millions of litres)	60.6	60.2	60.2	53.3	89.0	55.0
Domestic Sales of NZ Wine (millions of litres)	38.2	38.4	41.3	36.2	32.2	34.4
Consumption per Capita (litres NZ wine)	10.1	10.1	10.6	9.3	8.2	8.6
Export Volume (millions of litres)	15.2	16.6	19.2	19.2	23.0	27.1
Export Value (millions of NZ\$FOB)	97.6	125.3	168.6	198.1	246.4	281.9

Source: New Zealand Winegrowers

## **NEW ZEALAND GRAPE VARIETALS**

New Zealand offers a vast portfolio of wines. Over 25 different grape varieties are planted in commercial quantity in New Zealand, although the classic varieties of Chardonnay, Sauvignon Blanc, Pinot Noir, Cabernet Sauvignon, Merlot and Riesling account for the lion's share.

Varieties that respond to warmer growing conditions, such as Cabernet Sauvignon and Merlot, are more popular in the North Island. Varieties which favour cooler conditions such as Sauvignon Blanc, Riesling and Pinot Noir are more widely planted in the cooler South Island regions and in some North Island sites such as Martinborough.

### **SAUVIGNON BLANC**

New Zealand Sauvignon Blanc is acclaimed throughout the world as the definitive benchmark style for the varietal. Its exuberant, pungent flavours have dazzled wine critics everywhere. Sauvignon Blanc can produce lush, fleshy wine with nectarine and peach flavours in Hawkes Bay or more pungent and zestier wine with gooseberry, passionfruit and capsicum flavours when it is made from Marlborough grown grapes.

### **CHARDONNAY**

New Zealand Chardonnay is all about quality and diversity. The varied regional conditions combined with a winemaker's skill and innovation mean that Chardonnay in New Zealand comprises a myriad of ever evolving styles, capable of appealing to a wider range of palates.

Gisborne Chardonnay is often soft and beguiling with pineapple and peach flavours, while Chardonnay grown in Canterbury is more likely to be crisper with strong citrus/grapefruit and white peach characters.

### **AROMATICS**

With a climate ideal for the production of Aromatic wines, praise is now resounding for the increasing number of vibrant, world-class and regionally distinctive examples of New Zealand Riesling, Gewurztraminer and Pinot Gris.

### **NZ SPARKLING WINE**

A temperate climate, combined with the planting of the classical champagne varieties Chardonnay, Pinot Noir and Pinot Meunier, plus the use of the latest winemaking technology have enabled New Zealand to produce outstanding sparkling wine, now acclaimed throughout the world. Local winemakers have adapted traditional winemaking methods, but they produce wine styles unique to New Zealand with subtle fruit flavours that express the character of an array of vineyard sites

### **PINOT NOIR**

New Zealand is now acknowledged as one of the few countries to have successfully come to grips with this fickle, but supremely aristocratic grape variety. The temperate climate and long sunshine hours have combined with winemaker passion and skill to produce world class highly sought after Pinot Noir.

Martinborough Pinot Noir is typically intense and rich with ripe plum flavours while Central Otago Pinot Noir tends to be finer and more aromatic, with the distinctive flavour of black cherries.

## CABERNET SAUVIGNON AND MERLOT

The aristocratic stable mates, Cabernet Sauvignon and Merlot are star performers, particularly in New Zealand's warmer northern region. New Zealand Cabernet Sauvignon boasts structure and elegance, whilst a richness and warmth exude from New Zealand Merlot. In partnership, Cabernet Sauvignon and Merlot can be vibrant or richly mellow, powerful or subtly elegant.

### Varietal Overview

	<b>Producing Vineyard Area (Hectares) 2003*</b>	<b>% Total</b>	<b>Vintage (Tonnes) 2003</b>	<b>% Total</b>
<b>Sauvignon Blanc</b>	4,344	28%	28,266	37%
<b>Chardonnay</b>	3,513	23%	15,534	20%
<b>Pinot Noir</b>	2,549	16%	9,402	12%
<b>Merlot</b>	1,191	8%	4,957	6%
<b>Cabernet Sauvignon</b>	766	5%	3,201	4%
<b>Riesling</b>	589	4%	3,376	4%
<b>Others</b>	2,527	16%	11,664	15%
<b>Total</b>	<b>15,479</b>	<b>100%</b>	<b>76,400</b>	<b>100%</b>

Source: New Zealand Winegrowers

*\*Estimated Producing Vineyard Area*

## NEW ZEALAND WINE REGIONS

The wealth and diversity in the New Zealand styles is also attributable to the unique characteristics of the ten major wine producing regions in New Zealand. If the country's elongated shape were transposed to European latitudes, the New Zealand region would stretch from the Rhine Valley, through Alsace, Champagne, Burgundy, Loire, Bordeaux and into Southern Spain.

With such wide climatic and geographical variation, differences may be illustrated by the variation in the harvesting date of Chardonnay. In the warmer and more humid northern regions of Northland, Auckland and Gisborne, Chardonnay might begin to be harvested in late February or early March while in Central Otago, the world's most southerly Chardonnay grapes may first be picked in mid to late April - a difference of 6-7 weeks.

## Regional Overview

Main Winegrowing areas	Number of wineries 2003	General Soil Type	Producing Vineyard Area		Main varieties (% total Region Producing Area)	Vintage	
			(Hectares) 2003*	% Total		(Tonnes) 2003	% Total
<b>Auckland/Northland</b>	96	Red-brown clays from basaltic volcanic rock	470	3%	Chardonnay (21%), Merlot (19%), Cabernet Sauvignon (15%)	897	1%
<b>Waikato/Bay of Plenty</b>	13	Free-draining friable brown-orange soils	140	1%	Chardonnay (16%), Cabernet Sauvignon (13%), Sauvignon Blanc (11%)	497	1%
<b>Gisborne</b>	16	Grey-brown from recent river silts	1,811	12%	Chardonnay (55%), Muller Thurgau (7%), Muscat Varieties (6%)	14,350	19%
<b>Hawkes Bay</b>	56	Brown hill soils and river silts	3,752	24%	Chardonnay (26%), Merlot (22%), Cabernet Sauvignon (14%)	10,832	14%
<b>Wairarapa/Wellington</b>	44	Light grey-brown loess from wind-blown sediments	556	4%	Pinot Noir (45%), Sauvignon Blanc (17%), Chardonnay (13%)	1,311	2%
<b>Nelson</b>	26	River basin types, yellow-grey river silts	450	3%	Chardonnay (29%), Sauvignon Blanc (26%), Pinot Noir (23%)	3,149	4%
<b>Marlborough</b>	74	Stony, yellow-grey river silts	6,677	43%	Sauvignon Blanc, (55%), Chardonnay (15%), Pinot Noir (14%)	40,537	53%
<b>Canterbury/Waipara</b>	42	Greyish alluviums, stony yellow-grey sediments	554	4%	Pinot Noir (34%), Chardonnay (20%), Riesling (19%)	1,422	2%
<b>Otago</b>	52	Shallow, yellow-brown from alpine terrain	682	4%	Pinot Noir (69%), Chardonnay (9%), Pinot Gris (9%)	1,825	2%
<b>Other Areas &amp; Unknown</b>	2		387	2%		1,580	2%
<b>Total</b>	<b>421</b>		<b>15,479</b>	<b>100%</b>		<b>76,400</b>	<b>100%</b>

*Source: New Zealand Winegrowers*

*\* Estimated Producing vineyard Area*

## NEW ZEALAND WINE EXPORTS

During the last decade New Zealand wine exports have undergone a rapid phase of development. From just over \$4 million in 1987, exports today total \$281.9 million. Exports are now a core focus of the New Zealand wine industry, representing approximately 44% of all sales, expected to rise to a level of 60% in 2006. Industry forecasts project exports to nearly treble in volume to 73 million litres by 2007.

The growth in vines planted, the ever increasing acclaim and demand in export markets and the strong marketing investment by wineries all indicate that these projections are very achievable. The UK is still the primary export destination for New Zealand wine; taking 45% of all exports (by volume) in 2003, followed by the USA with 21% and Australia with 17%.





## INNOVATIVE PRACTICES

New Zealand's status as a producer of world-class wines has been accelerated through combining the skilful implementation of established methods from the world's great wine regions, with innovations in areas such as canopy management and stainless steel fermentation.

To sustain this position in the future and ensure that New Zealand wines remain 'the riches of a clean green land', New Zealand grape growers and winemakers are committed to protecting the environmental integrity of the vineyard. To this end a pioneering code of practices has been developed known as 'Sustainable Winegrowing New Zealand', which provides a framework for environmentally and economically sustainable viticultural practices. Through the development and introduction of the winery scorecard in 2002 the scope of the programme has broadened beyond the vineyard gate and now provides the framework for companies to continually work towards improving all aspects of their performance in terms of environmental, social and economic sustainability in both the vineyard and the winery.

At Year End June 2003 the programme had been adopted by growers from all grape-growing regions with 323 participating vineyards covering 8,815 hectares, approximately sixty percent of New Zealand's total wine grape vineyard area, and 30 winery pilot members.