WWTG VINI-VITICULTURAL DATA

DR JOHN BARKER

New Zealand Winegrowers

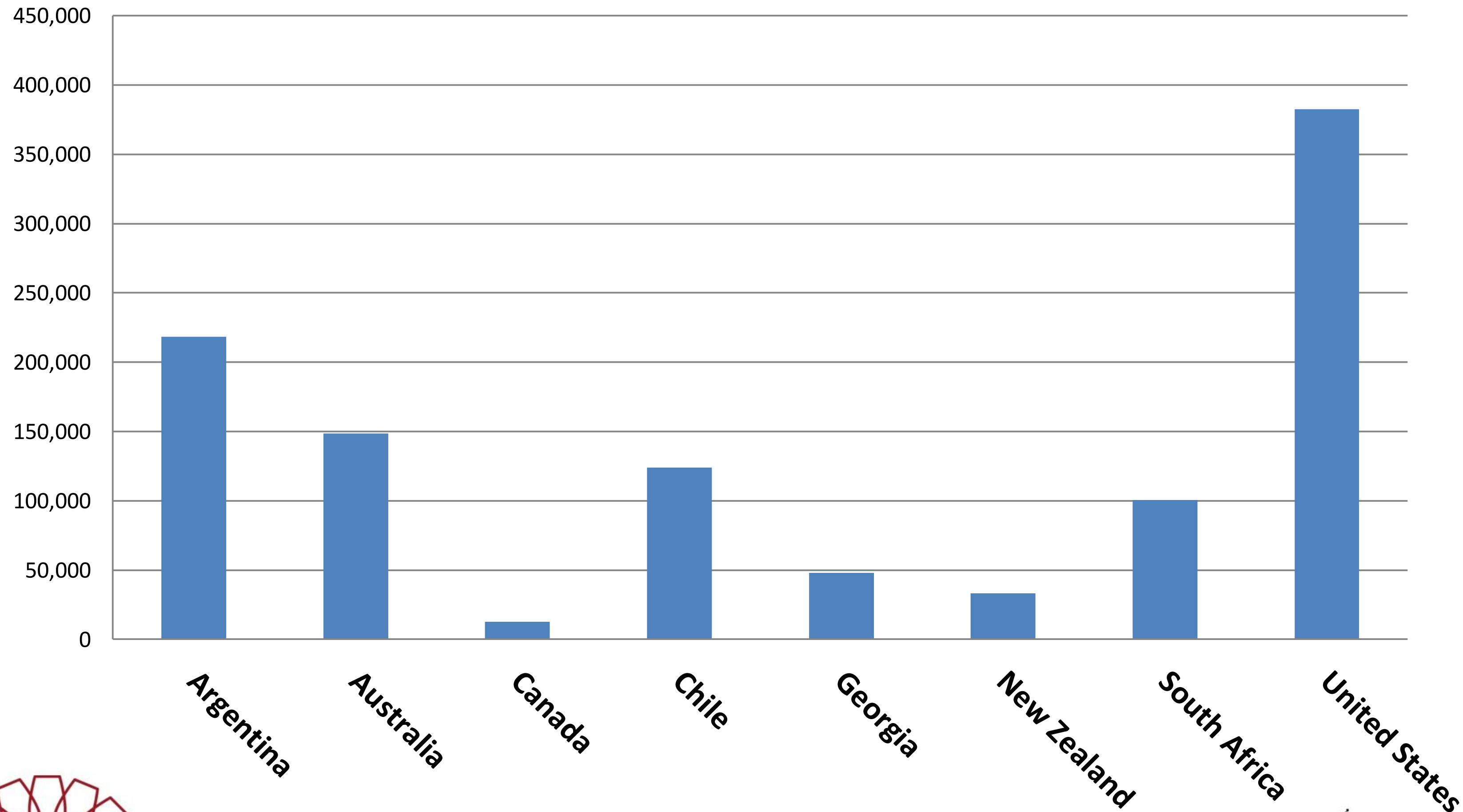
World Wine Trade Group

AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE

PURE DISCOVERY

WWTG vineyard area in hectares 2011



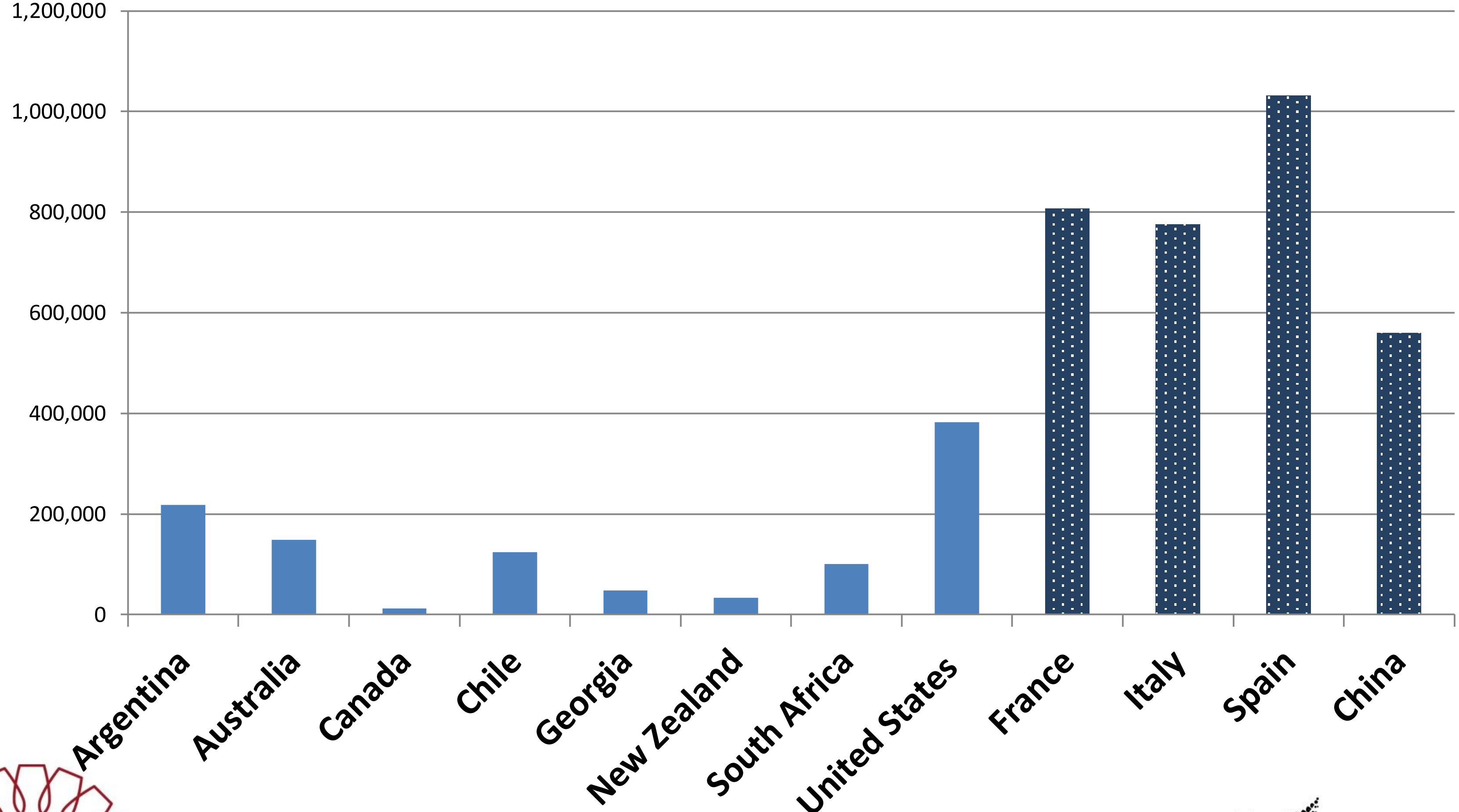
World Wine Trade Group

AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE

PURE DISCOVERY

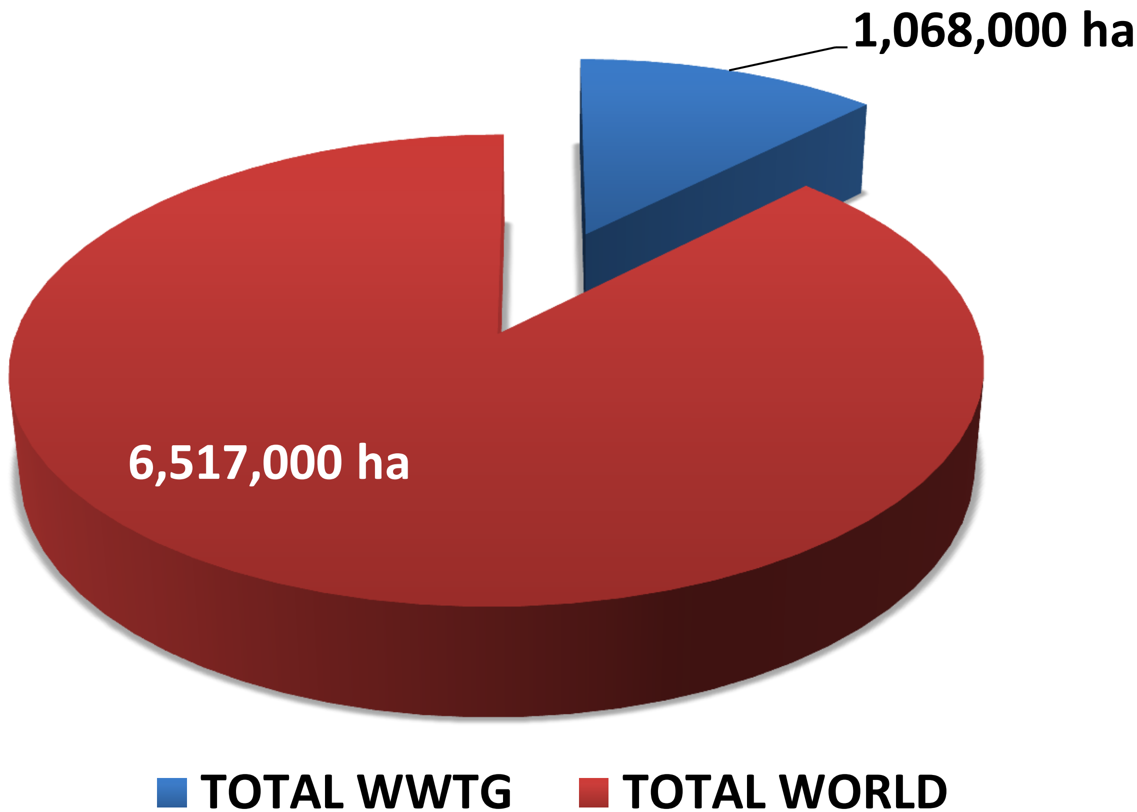
WWTG v FR, IT, SP, CN



World Wine Trade Group
AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE
PURE DISCOVERY

WWTG v Global Vineyard Area 2011



WWTG = 16.5% of total global vineyard area

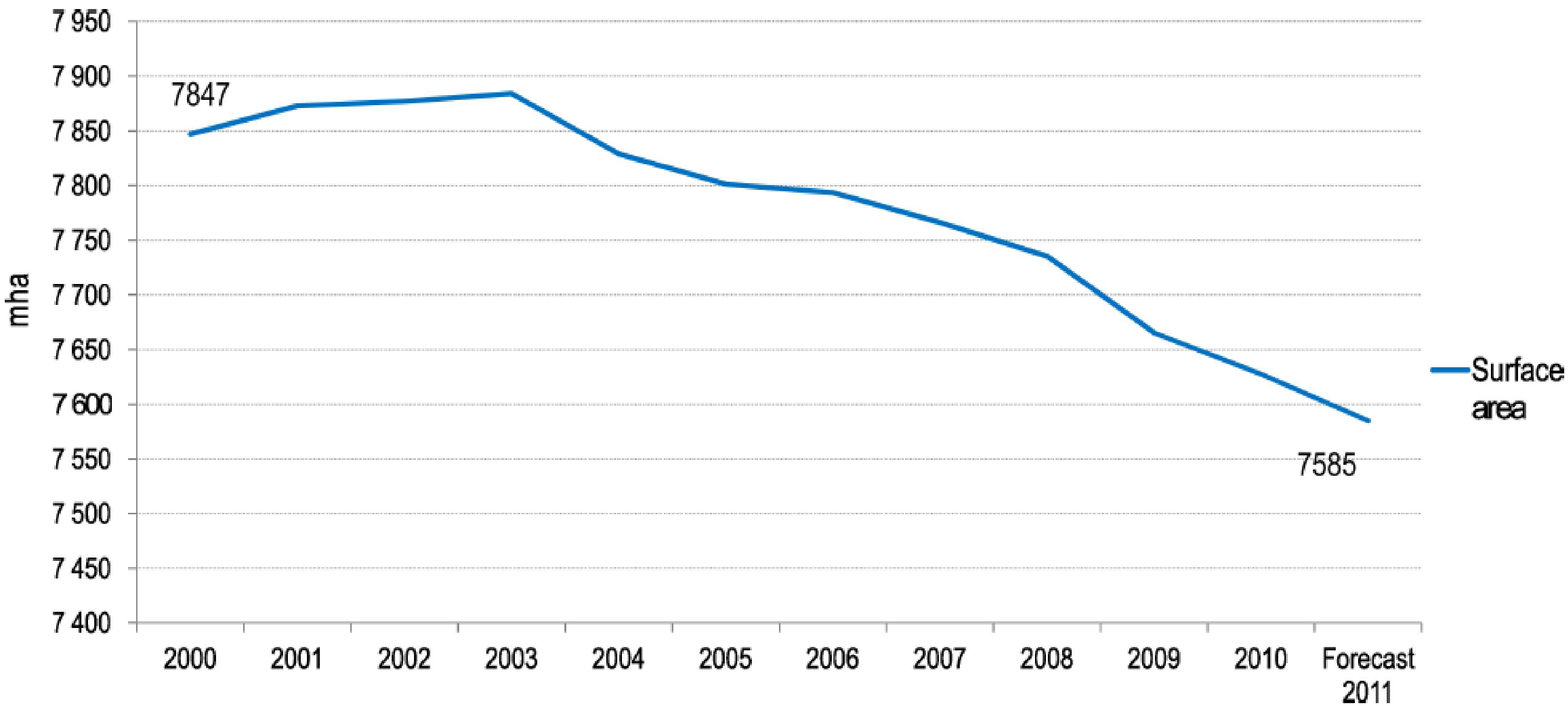
World Wine Trade Group

AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE

PURE DISCOVERY

Global vineyard area 2000-2011

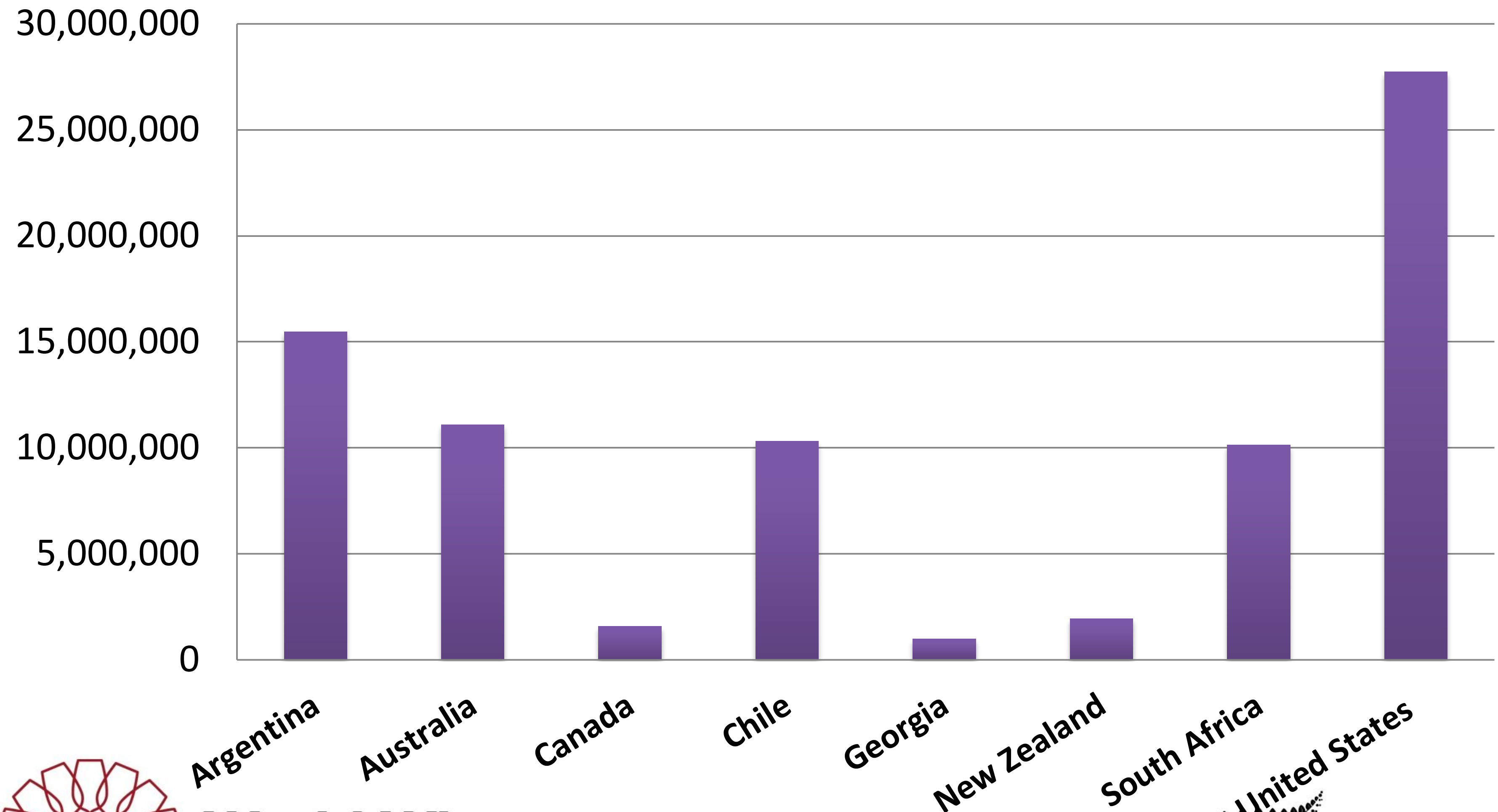


World Wine Trade Group
AUCKLAND 7-9 NOVEMBER 2012

Source: OIV

NEW ZEALAND WINE
PURE DISCOVERY

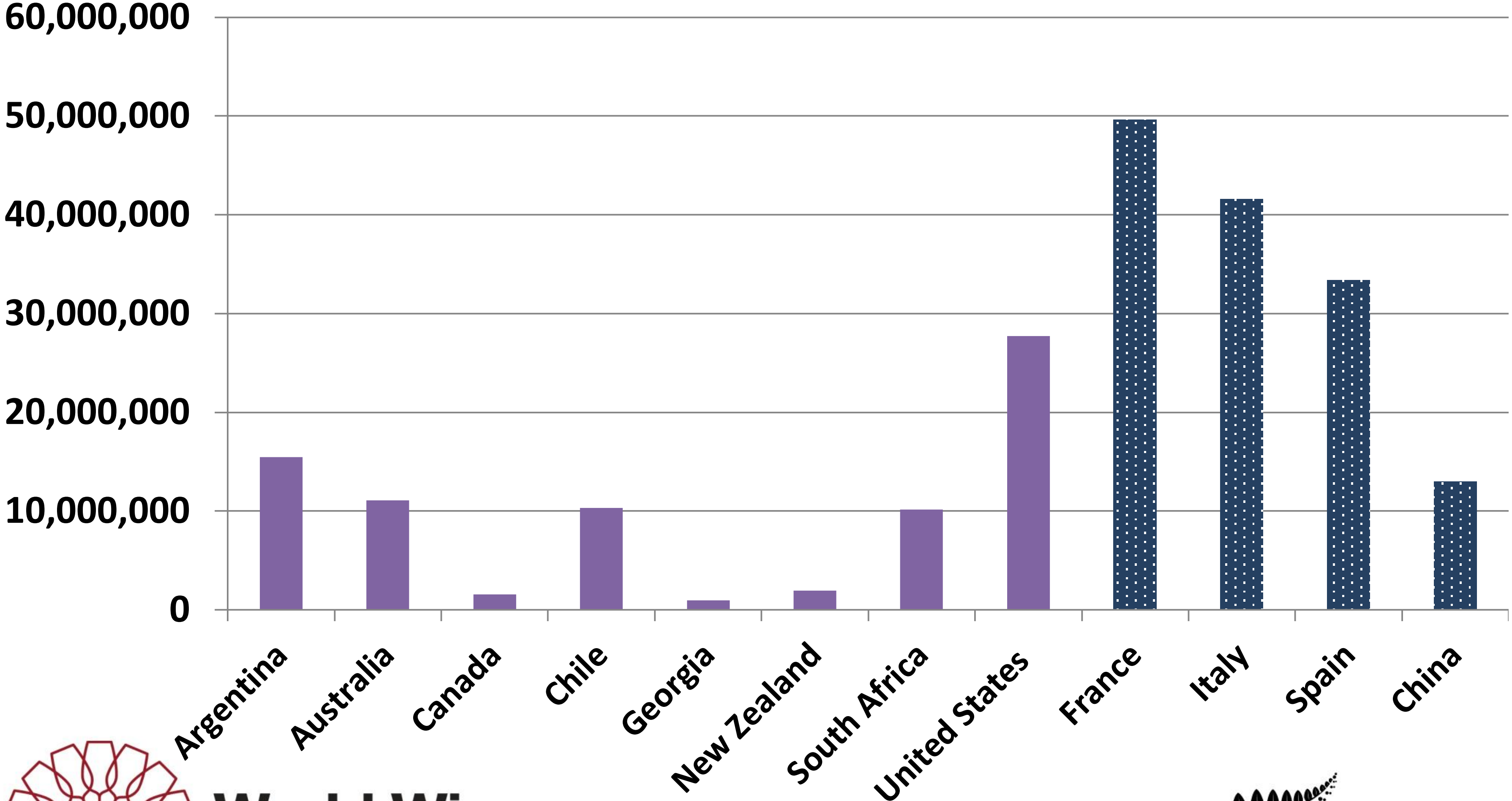
WWTG production in hectolitres 2011



World Wine Trade Group
AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE
PURE DISCOVERY

WWTG production v FR, IT, SP, CN 2011

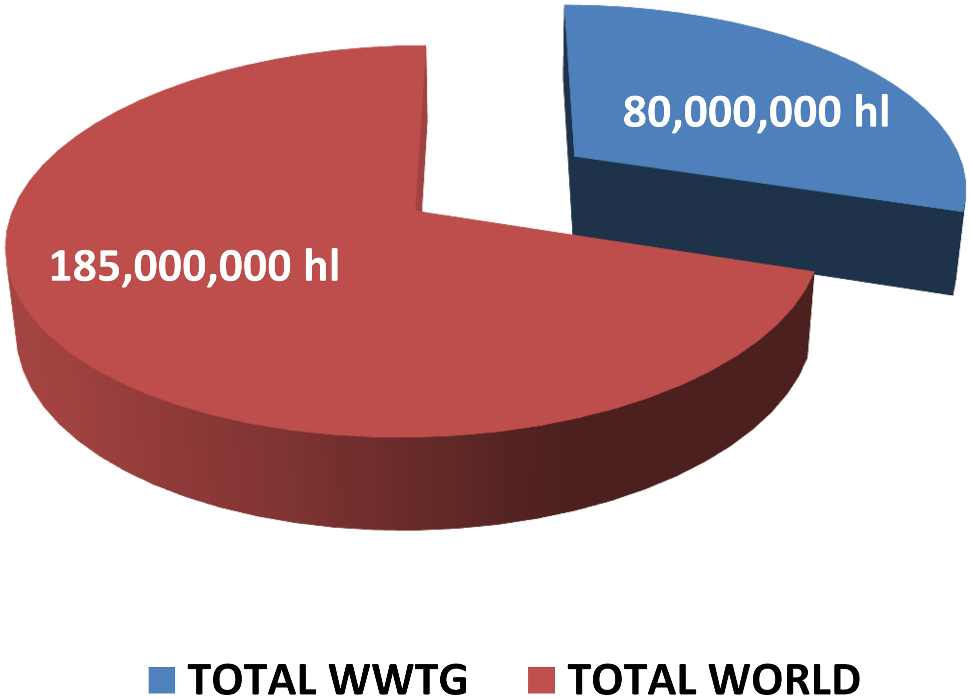


World Wine Trade Group
AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE
PURE DISCOVERY

WWTG v Global Production 2011

WWTG = 28% of total global wine production



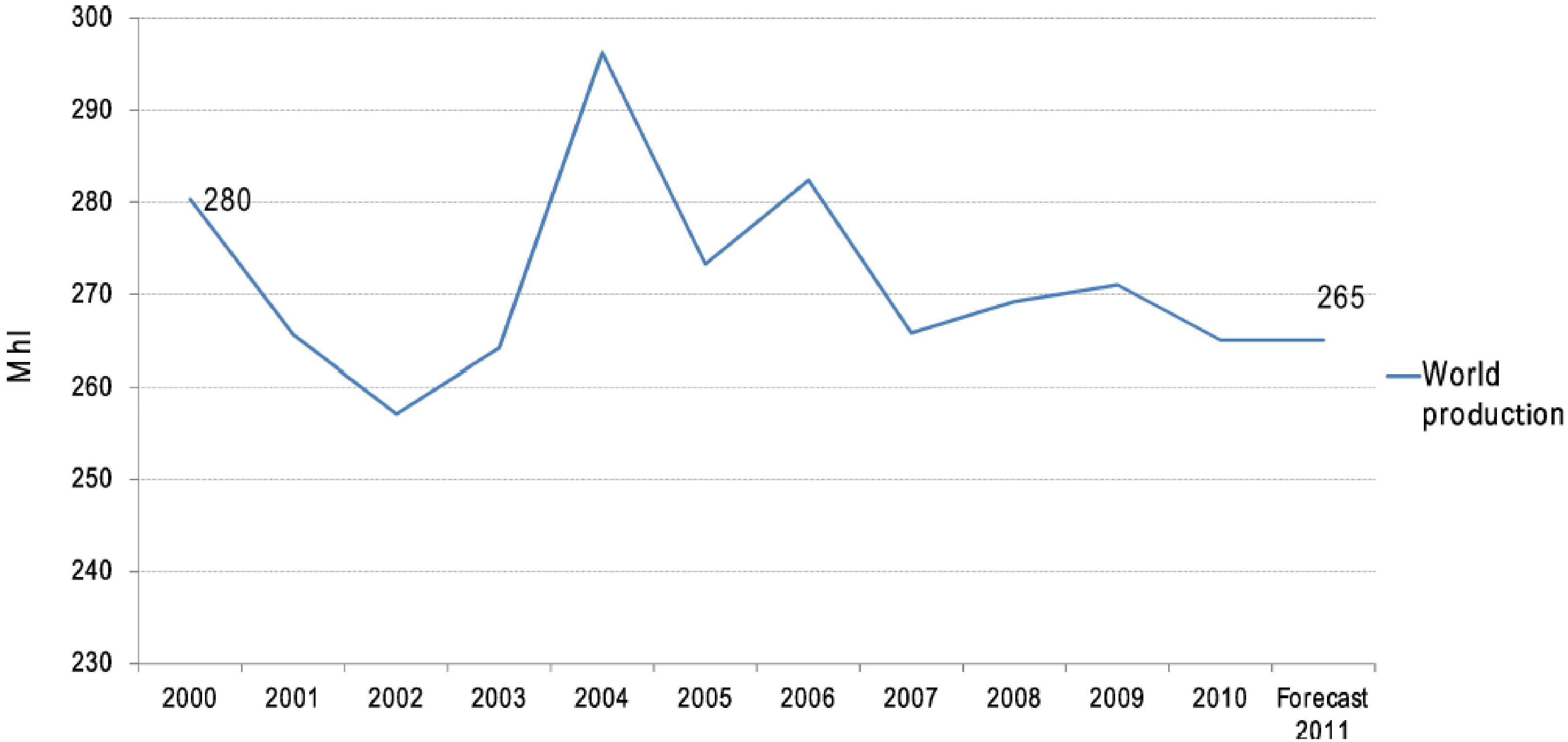
World Wine Trade Group

AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE

PURE DISCOVERY

Global production 2000-2011

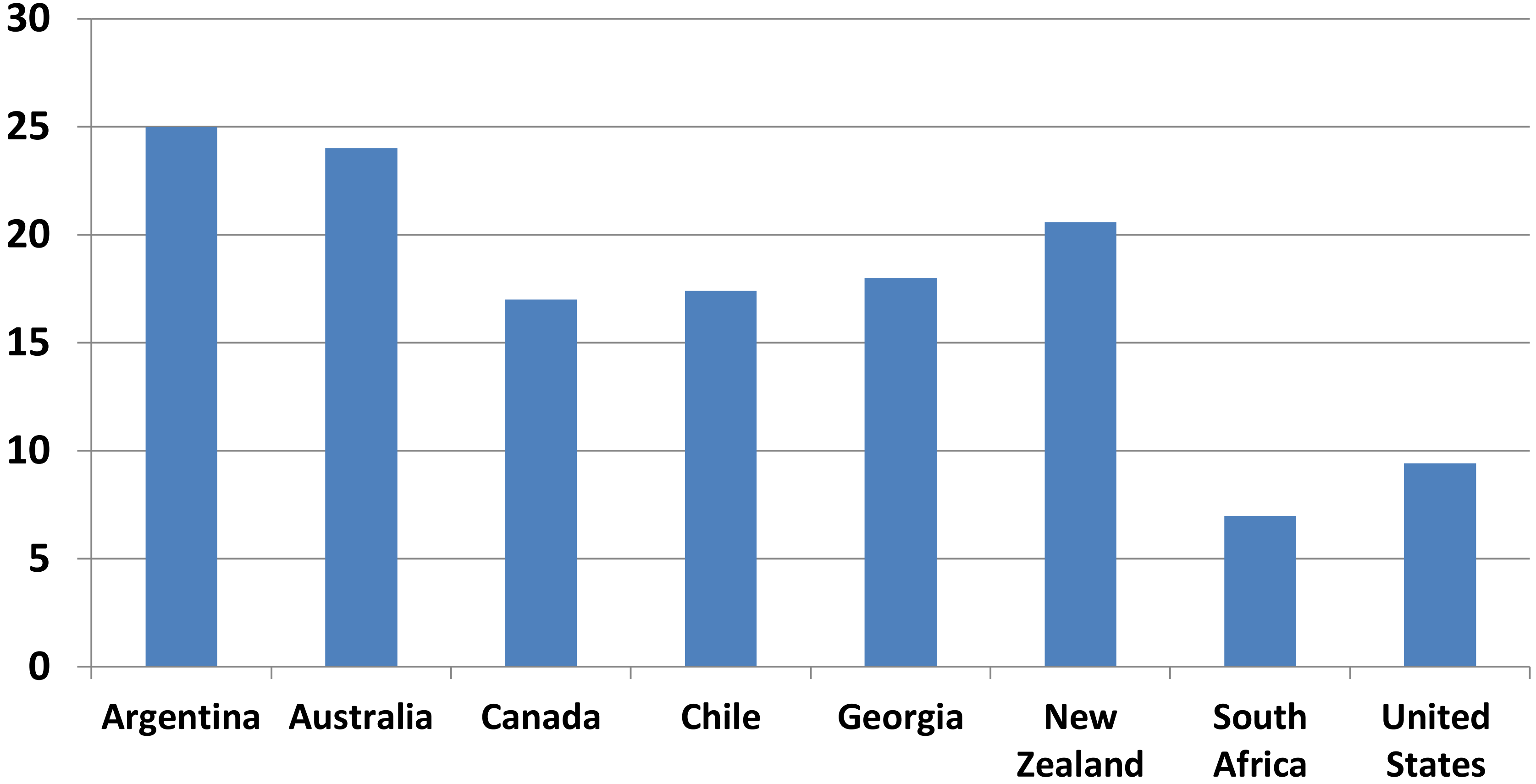


World Wine Trade Group
AUCKLAND 7-9 NOVEMBER 2012

Source: OIV

NEW ZEALAND WINE
PURE DISCOVERY

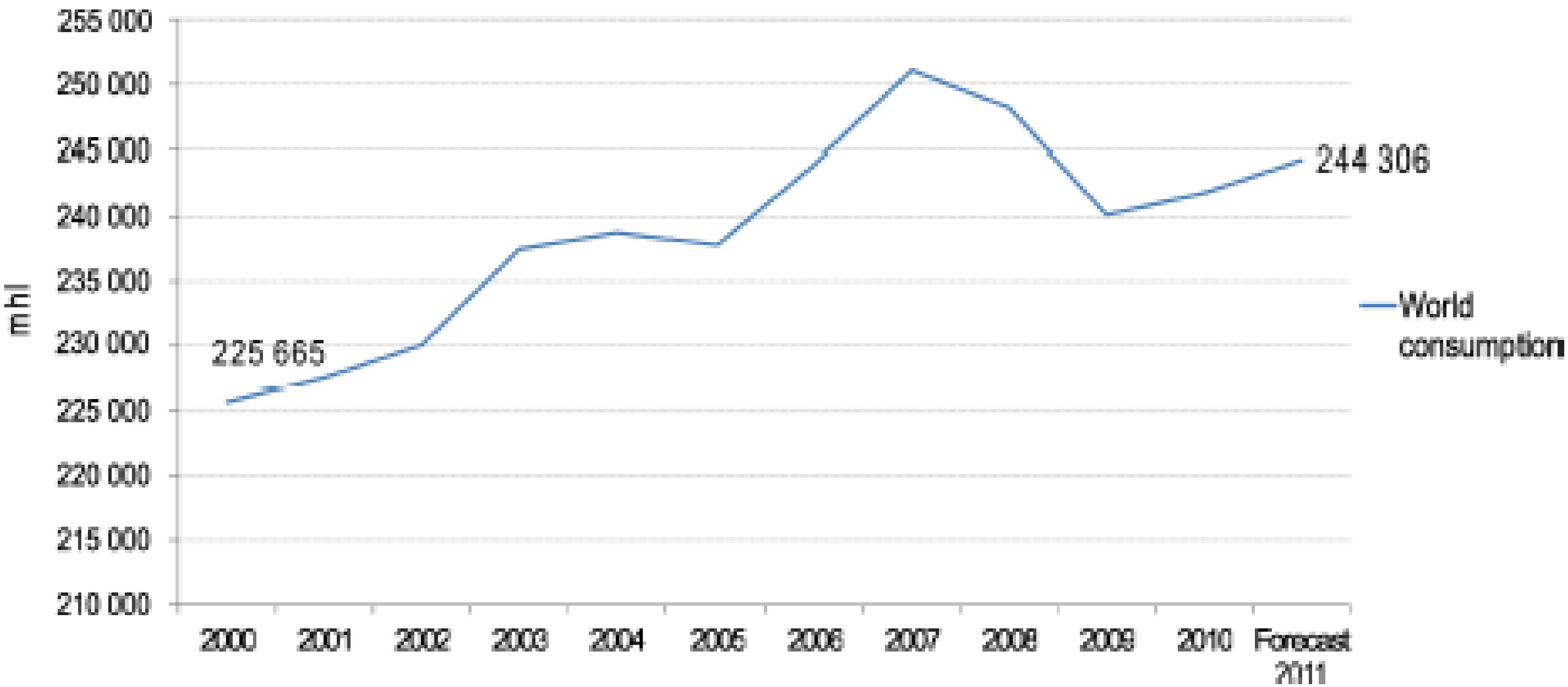
Wine consumption per capita in litres



World Wine Trade Group
AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE
PURE DISCOVERY

Global consumption 2000-2011



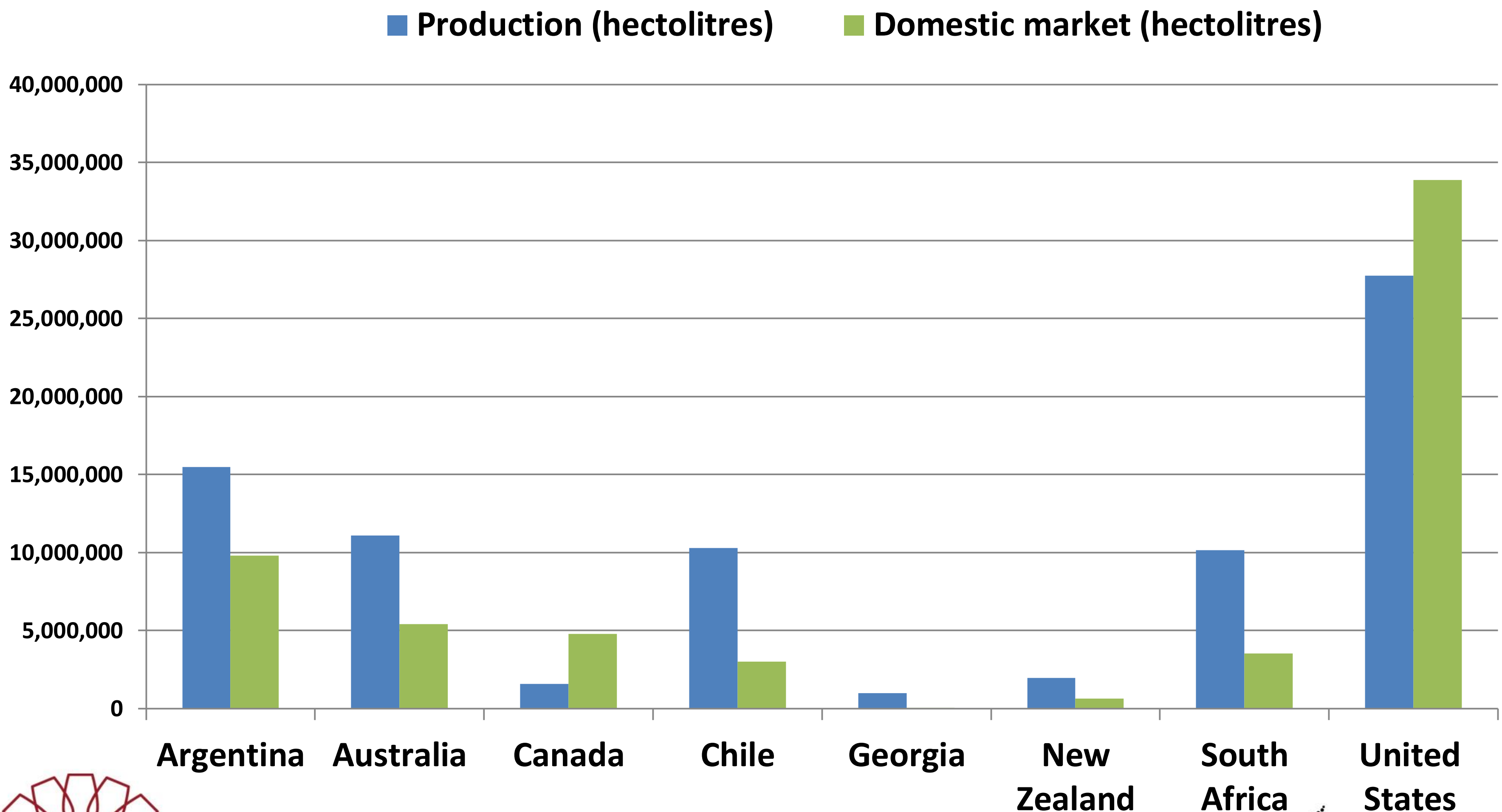
World Wine Trade Group

AUCKLAND 7-9 NOVEMBER 2012

Source: OIV

NEW ZEALAND WINE

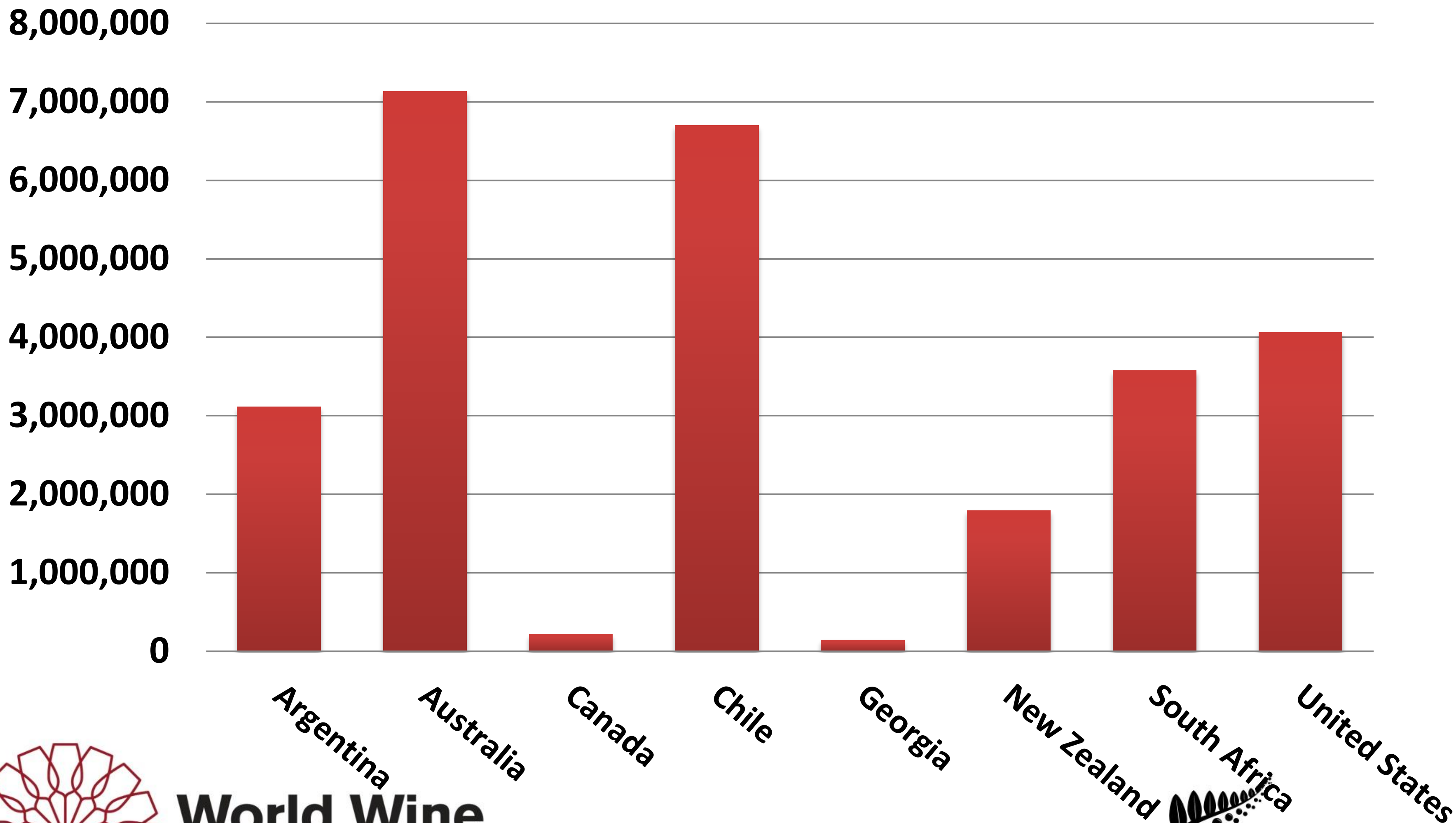
PURE DISCOVERY



World Wine Trade Group
AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE
PURE DISCOVERY

WWTG Exports 2011 in hectolitres



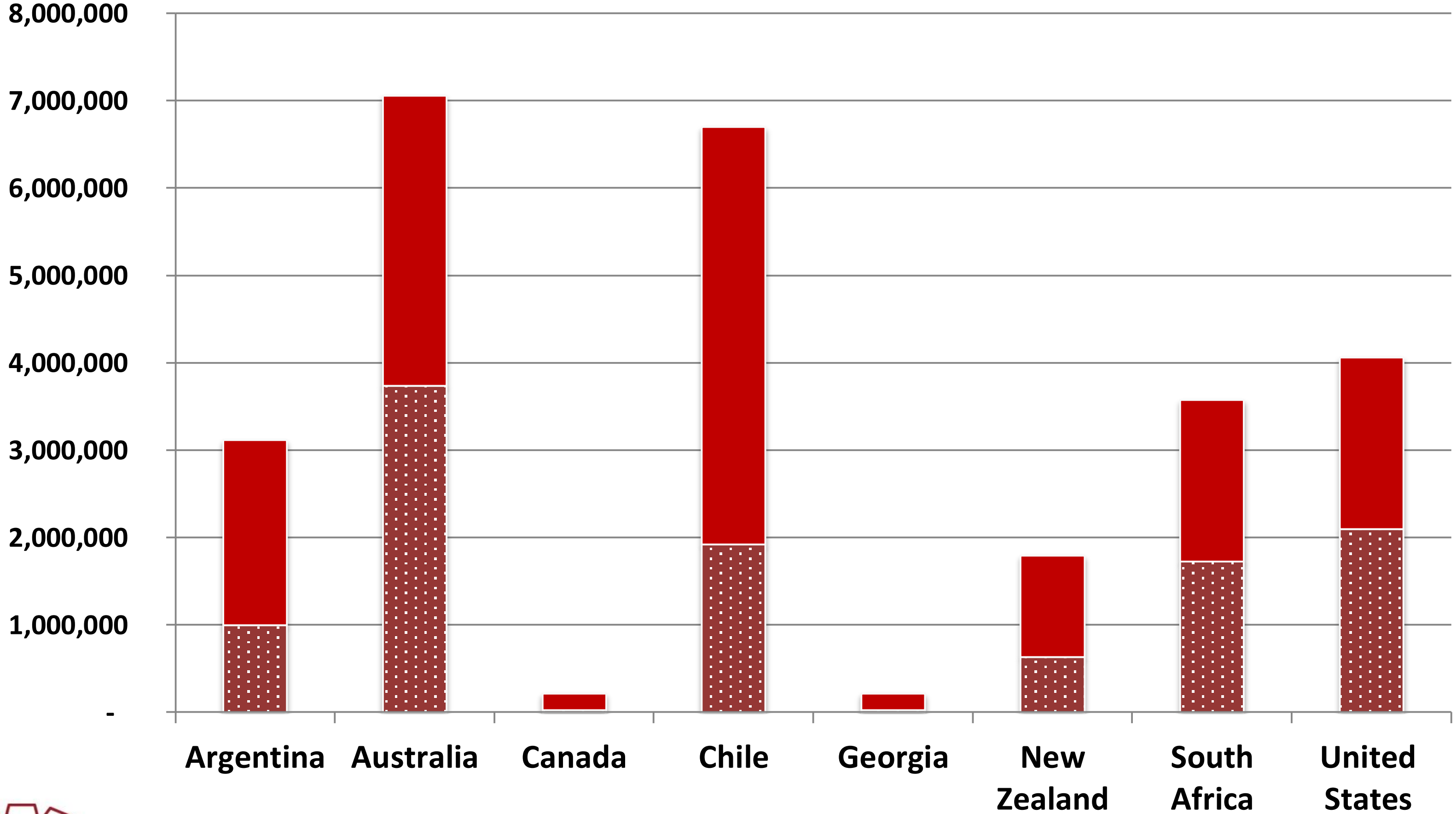
World Wine Trade Group

AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE

PURE DISCOVERY

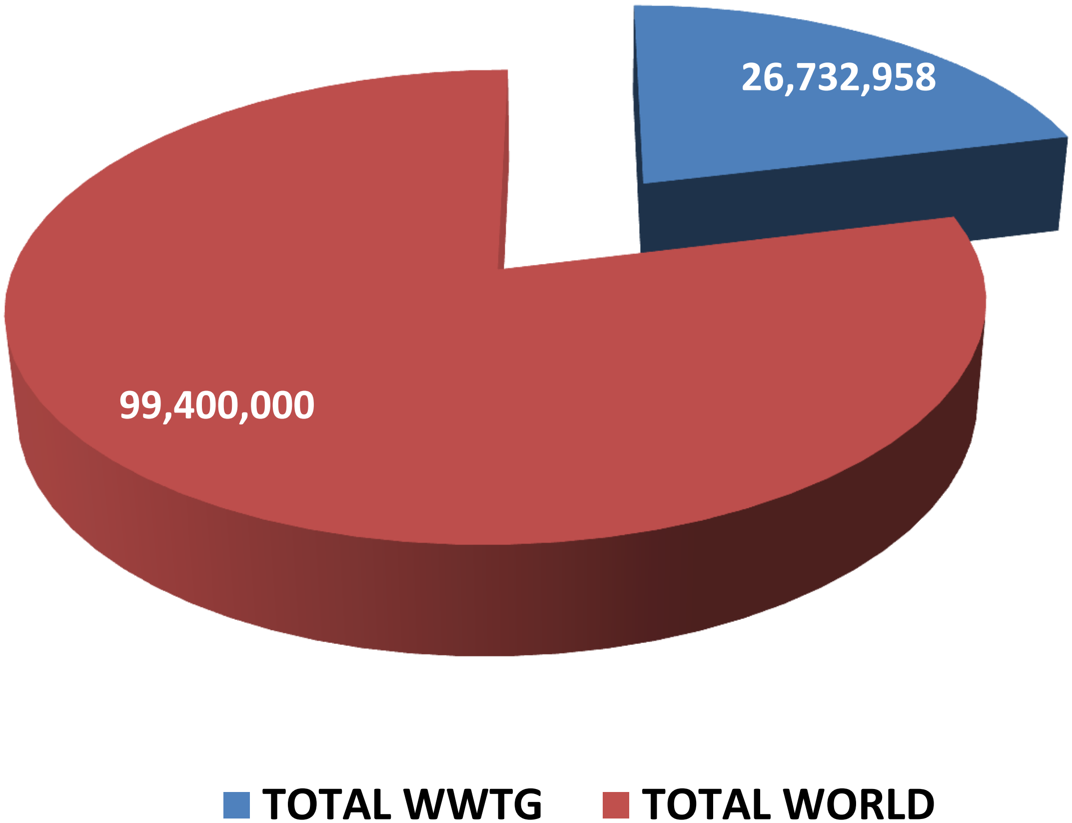
Bottled v bulk exports



World Wine Trade Group
AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE
PURE DISCOVERY

WWTG v global exports 2011



WWTG = 27% of total global wine exports

World Wine Trade Group
AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE
PURE DISCOVERY

Trends

- EU vineyard area reducing due to reform measures
- WWTG vineyard area stabilising after a period of growth
- Long term trend is major net reduction in productive capacity
- Consumption has rallied after post-GFC dip
- Oversupply appears to be over for now
- WWTG trade remains very strong
- Bulk wines are a key trend in export growth
- EU & USA largest export markets for most WWTG exporters but Canada & China very important also.

World Wine Trade Group
AUCKLAND 7-9 NOVEMBER 2012

NEW ZEALAND WINE
PURE DISCOVERY