
NZ wine sales overview

Nov 2009

2009 Review: Highlights

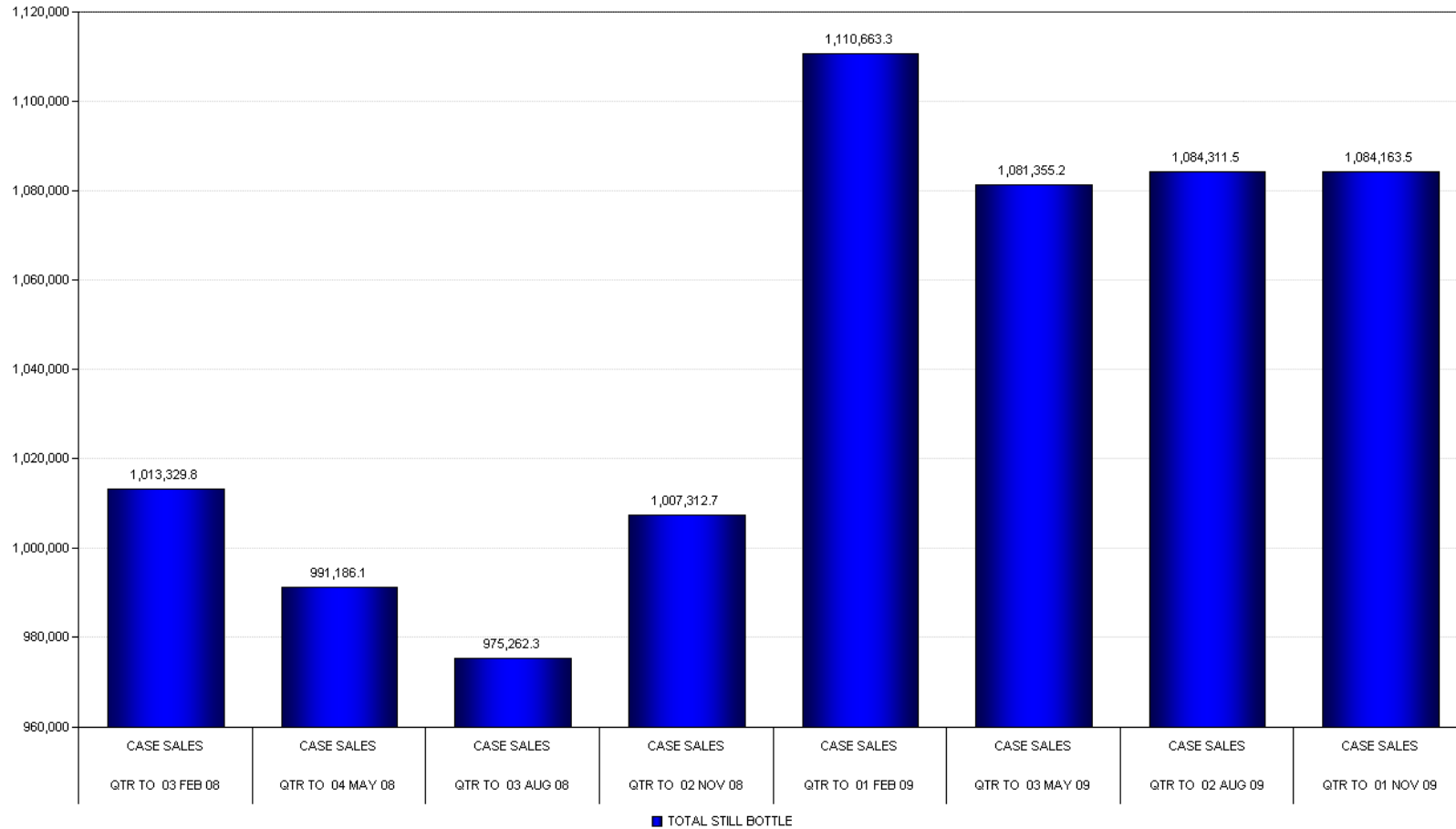
- Exports up 27% (volume), 24% (value).
 - Sauvignon Blanc up 37%
 - Pinot Noir up 8%
 - Pinot Gris up 62%
- By Market:
 - UK up 22%
 - Australia up 51%
 - USA up 18%
 - Domestic sales up 29%
- New consumers to NZ wine

2009 Review: Challenges

- Prices falling
- Bulk wine exports now 20% of volume (was 5%)
- Recession stalled growth in developing markets
- We are not the only nation with a surplus
- Retailers exploiting surplus – Private Label and Margin

NZ Market Growth

Column Chart | TOTAL SUPERMARKETS | TOTAL STILL BOTTLE
 Units of Measure: Units = PACKAGE SALES | Volume = LITRES SALES | Value = DOLLAR SALES



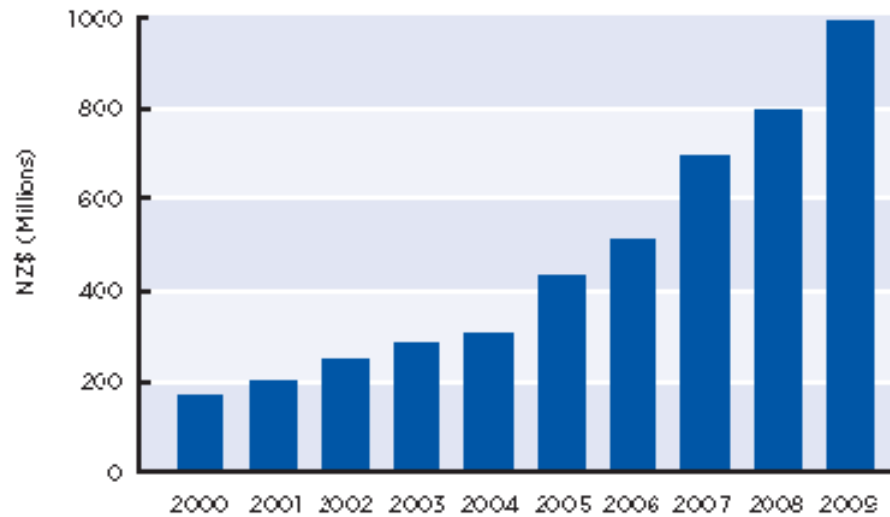
SOURCE: ACNielsen New Zealand ScanTrack (WNSTBLVM)



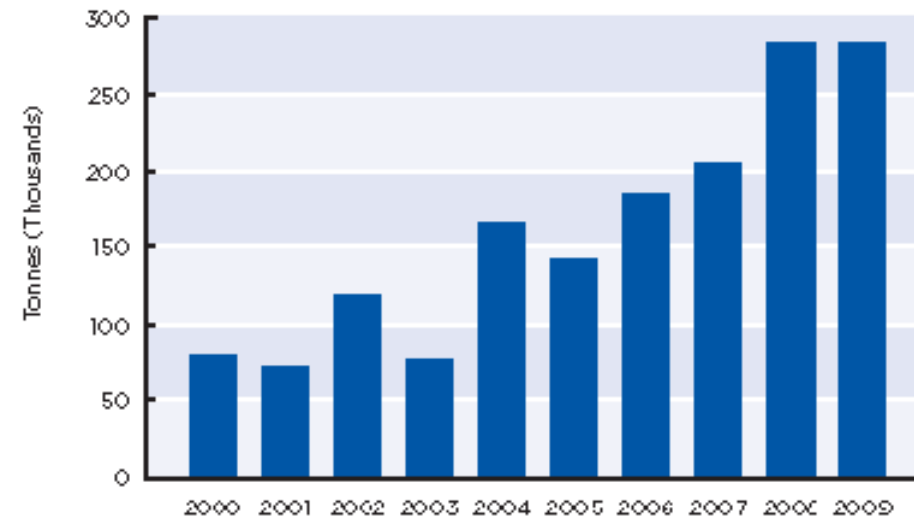
VILLA MARIA
ESTATE

Export Sales vs Production

WINE EXPORTS BY VALUE



VINTAGE 2009 (BY TONNES)





VILLA MARIA
ESTATE

Villa Maria – plans for continued growth

- Avoid commodity segment where possible
- Long term profitable growth by:
 - Addressing route to market issues
 - Maintain and grow brand strength
- Supply and demand in balance
 - Improved demand forecasting
 - Outlets for surplus if they occur
 - Reduce reliance on core markets