

# NZ GEOGRAPHICAL INDICATION (GI)

## **EXAMINATION CHECKSHEET**

# Application information (reg 7) and formalities

Box Reference Number			
1	GI Number:	GI Name:	
	1015	WAIHEKE ISLAND	
2	New Zealand GI	🗵 Yes	No
	correctly selected		
	(cf foreign)		
3	Goods GI for	⊠ Wine	Spirit

4	GI correct?	$\boxtimes$	Yes		No	Comment(s):
5	Applicant/ Agent details correct		Yes		No	Comment(s):
6	Wine or spirit correctly stated	$\boxtimes$	Yes		No	Comment(s):
7	Geographical co-ordinates relate to the place of geographical origin to which the GI relates	$\boxtimes$	Yes		No	Comment(s):
8	Description of Conditions provided		Yes 🗆	No	⊠ NA	Comment(s):



# Additional Information required before Acceptance (reg 8(1))

9	Explanation of	$\boxtimes$	Yes	No	Comment(s):
	characteristic essentially				
	attributable to the GI				
10	Evidence of characteristic	$\boxtimes$	Yes	No	Comment(s):
	essentially attributable				
	to the GI				

## Examination

11	GI identical to registered GI (s10)	Yes	$\square$	No	Comment(s):
12	GI identical to customary name of grape variety (s11)	Yes		No	Comment(s):
13	GI identical to common name for wine or spirit (s12)	Yes		No	Comment(s):
14	GI use or registration likely to be offensive (s13A)	Yes		No	<b>Comment(s):</b> Note WAIHEKE ISLAND GI discussed with Karen from Maori Advisory Committee Determined that GI would not be offensive for the purposes of indicating the area as a GI.
15	GI identical to trade mark for	Yes	$\boxtimes$	No	Comment(s):



identical goods or services (s14) GI identical to 16 Yes  $\boxtimes$ No Comment(s): trade mark for similar goods or services (s15) 17 GI similar to Yes No  $\square$  $\boxtimes$ Comment(s): trade mark for identical goods or services (s16) 18 GI similar to Yes  $\boxtimes$ No Comment(s): trade mark for similar goods or services (s17) 19 Conditions of use Comment(s): □Yes □No  $\boxtimes$  NA Entered (s41)

## **Reference Searches**

20	Acsepto searches	$\boxtimes$	Yes	No	Comment(s):
	saved				
	to MAKO				
21	Internet searches	$\boxtimes$	Yes	No	Comment(s):
	saved				
	to MAKO				



## Evidence

22	Statutory declaration/ affidavit	$\boxtimes$	Yes	No	Comment(s):
	complies with				Note
	s9 of Oaths and Declarations				reference
	Act 1957				to Emma
	(for statutory declarations)				Jenkins
	or the High Court Rules				comments
	(for affidavits)				is hearsay

## Quality, reputation or other characteristic

The Applicant should explain and provide evidence of the quality, reputation or other characteristic of the wine or spirit that is attributable to the GI (**reg 8(1**)).

The explanation and evidence should show how the specific characteristic(s) of the wine and/or spirit are linked to features (whether natural or human) within the geographic area.

The below template includes headings that reflect the type of information that IPONZ typically expects to receive as part of an application (**reg 8(2**)).

## History and background

The quality, reputation and other characteristics of wine or spirits from a particular area will often be linked to the founding and development of the area for wine or spirit production. Background may also include a description of the history relating to the word that indicates the area as a GI.

23	Comment(s):
	Declaration confirms wine history of Waiheke Island at page 3:
	Wine has been produced on Waiheke Island since 1950s.
	• First vines were planted in 1977 and continued through the 1980s.



<ul> <li>Number of vineyards grew in the 1990s.</li> <li>2007 the Applicant created the "Certified Waiheke Island Wine" to protect wine production in the area.</li> </ul>
The history provided above shows how the reputation for the GI WAIHEKE ISLAND has developed over time.

## Geographical features in the area

Geographical features may include general topography, elevation, natural features that provide shelter or that alter wind direction, ridges, valleys, plains, underground waterways and water tables, proximity to the coast or other bodies of water, slope, aspect and accessibility.

24	Comment(s):
	The declaration confirms WAIHEKE ISLAND GI has a unique maritime geography and environment and this impacts on the quality, characteristics and reputation of the wine from this GI. (Page 2).
	The declarant explains the geographical feature of the GI at page 5 and these elements affect vine growth and fruit ripening and effect sensory characteristics of the wine.



Appended to this evidence as Appendix 1 is a geological map of the WAIHEKE ISLAND GI. With some exceptions, most of the island's vineyards are separated only by thin layers of soil and clay from massive sequences of Jurassic rock strata that range from approximately 145 to 158 million years in age. Waiheke wines derived from these sediments are distillations of millions of years of earth's history and vines now flourish where dinosaurs and ammonites once ruled. Elevation of the early landform above sea level and millions of years of erosion, has left only small isolated pockets of younger sediments surviving above the Jurassic sequences. Even in these areas the missing geological record can extend to 130 million years. Most of the island rock on which we now walk and work is of Jurassic age. However, the different rock types and a large time span allow for a significant range of terroir effects across the small island. For example, West of Oneroa in the Te Rere Cove and Fossil Bay areas, small areas of vines are planted on bands of 20 million year old Miocene sediments of sandstone, mudstones, conglomerates and limestone. Some plantings at the East end of the island around Stony Batter and Man O War Bay, are sited over Miocene andesite lava flows with some basalt and Miocene conglomerates. In the Onetangi area a small deposit of highly weathered Pleistocene alluvial clays and gravels underlies the vineyards. In Te Matuka Bay there are alluvial deposits of clay, peat, weathered gravel and thin pumice of Holocene age.

The rock strata has been enormously compressed and fractured by tectonic activity causing the landscape to be massively deformed by a series of compression folds, whose axes run more or less North - South. This has created steep ridge and valley type topography. The compression folds are often somewhat overturned and faulted to the East and the island is broken into three major blocks by the two main fault lines (Waiheke and Cowes) which run from SW to NE. The resulting landform of the island affects exposure of vineyard areas to the sun, wind and rain. The prevailing wind is from the SW and with the undulating topography there are many sheltered, warm sites planted. In contrast, varieties requiring less heat accumulation can be planted on higher, more exposed sites. All these elements affect vine growth and the ripening of fruit and are associated with particular viticultural aptitudes and sensory characteristics both across the GI as a whole and between different parts of the GI.

It has been suggested, the rock that underlies a vineyard is a major factor, or even the major factor, in determining varietal variations in different terroirs, so the location of our vineyards on these widely varying geological formations provides great scope for diversity of both viticulture and winemaking within the GI.

#### Soil composition in the area

Soil composition in the area may include the soil type or types (such as sandy, clay, silt or loamy soils), and the presence of particular rock (such as gravel, schist or slate). The characteristics of the soil such as its temperature, pH, drainage, salinity and nutrient/mineral profile may also be relevant.



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25 Comment(s): Waiheke Island has clay-based soil and subsoils. The declarant confirms at page 6 that it is these clay soils are thought to aid "mouth feel and structure" in GIs wines. Furthermore, the low-fertility mineralised soils assist in the flavour of the wines from the GI. These are detailed by the declarant on pages 5 and 6. The soil types of the WAIHEKE ISLAND GI are an important contributor to the distinctive sensory characteristics of our wines. The structure and composition of the soil, subsoil and underlying rock formations in which vines grow affects factors such as drainage, water availability, microbial population, root penetration and nutrient uptake of the vines. In general, the soil in Waiheke vineyards is highly mineralised and naturally low in pH, phosphate and organic matter, and with low permeability. Waiheke's clay-based soils and subsoil clays are substantially the product of weathered rock. During the weathering process from rock to clay, the upper layers of the greywackes, argillites, mudstones and sandstones are slowly broken down to 'rotten rock' criss-crossed with mineralised veins and heavily stained with iron and manganese oxides. The latter are derived from submarine basaltic pillow lavas injected here and there throughout the island into the Jurassic sediments during their formation deep in the ocean trench. The thin, cracking-clay stony soils which result are rich in minerals, particularly iron, manganese and magnesium and separated from the rock below by layers of acidic, aluminium-rich clay that can be many metres thick. Due to the high clay content, the top soils tend to shrink, crack and swell with the seasons. Although the clay-based soils derived from the Jurassic sedimentary strata dominate in most parts of the GI, some sites show variations. For example, some gully floors contain accumulations of richer, younger, alluvial soils and gravel. Soils on the Western end of the island display volcanic ash layers and pans which originated from Rangitoto ash eruptions combined with the burning of ancient forests. In some parts of the Eastern end of the island soils are influenced by the andesite, basaltic lava flows and conglomerates which overly the Jurassic sedimentary rocks. Clay soils are thought to aid 'mouth feel and structure' in Waiheke grown wines, and low-fertility mineralised soils are generally conducive to flavour in wine. However, the health of the vines on Waiheke requires management of drainage, soil organic matter and pH on an on-going basis.



#### Climate in the area

Applicants may like to include relevant climate data from the geographical area such as rainfall, temperature, prevailing winds and hours of sunshine. Ideally, such evidence should comprise or be supported by research data from a reputable institution.

26	Comment(s):								
	The declarant confirms the warm and moderate climate assists in producing high quality wines from a suite of grape varieties. (Page 2)								
	Climate one of the primary indicators of growth and ripening of grapes which contribute to sensory attributes. Declarant explains GIs climate at pages 6 and 7.								
	Climate in the area								
	Climate is one of the primary determinants of the growth and ripening of the grapes grown within a GI, which in turn contributes to distinctive sensory attributes in the wine produced. It affects the development of fruit, the duration of ripening and the timing of harvest, as well as impacting upon fruit quality and vine health.								
	The WAIHEKE ISLAND GI's key features are its island location in a temperate maritime environment, mild climate and stable, warm growing season with a general absence of weather extremes. A key feature, probably the most important climatic factor, is the relative 'rain shadow' effect of lying between the Waitakere ranges to the West and the Coromandel peninsula and Barrier islands to the east which leads to a significantly lower rainfall during critical times of the year. It is one of the few New Zealand GIs able to consistently and successfully ripen Bordeaux red varieties.								
	The GI's climate is strongly influenced by the surrounding sea which keeps the island cooler in summer and warmer in winter, despite some moderation by the mainland land masses to the South, East and West which afford some protection from the prevailing north east and south-westerly weather systems.								
	Its inner location within the Hauraki Gulf means the island is partially protected from the open Pacific Ocean to the east by the Coromandel Peninsula, reducing the influence of cooler airflows coming up from the Southern Ocean. The WAIHEKE ISLAND GI benefits from the Auckland region's mild climate, which is generally warmer and more benign than the country's other more southerly wine regions. This allows the GI to produce later-ripening varieties such as Cabernet Sauvignon in good years and Viognier, many of which are positioned at the ultra-premium end of the market. The lack of extreme heat also ensures acidity levels can be well managed, maintaining varietal expression and freshness.								
	Waiheke Island's varied, hilly topography means that the GI's vineyards are subject to macro- and meso-climate effects. With vineyards planted on varying slopes and aspects, winemakers may note significant differences between sites that are very close together.								



	The northerly latitude and benign maritime climate of the Hauraki Gulf confers relatively consisten sea and air temperatures throughout the year. The WAIHEKE ISLAND GI is not particularly prone to extremes in temperature, rainfall or drought patterns, and there is a very small diurnal shift both across individual days as well as the seasons.
	The WAIHEKE ISLAND GI has a mean annual air temperature of approximately 15 degrees Celsius. Sunshine hours for the GI are relatively high with NIWA's Waiheke Island Awaroa site reporting around 2100 hours per annum. The WAIHEKE ISLAND GI's Hauraki Gulf location is slightly away from the cloud-attracting main land mass, meaning the GI's sunshine hour averages are slightly higher than mainland Auckland GI figures (closer to around 2000 hours per annum). It is generally cloudie in winter than summer, further assisting with a long, consistent ripening season for grapes. The general impact on the GI's wine styles is of a rounded, fleshier and weightier character, with aromatic and palate fruit characteristics being at the riper end of the spectrum.
1	Humidity levels are relatively high in the GI, as they are throughout the wider Auckland region and rainfall is regular throughout the year, though specific episodes are typically short-lived rather than sustained. Mitigating factors are the relatively exposed, well-drained and often sloping sites, sea breezes and the fact that the rainfall tends to occur as brief light showers which rapidly dry out with sun and wind.
ig ne ir	As befitting an island location, wind can be a significant factor in the GI, however as noted previous Waiheke Island's relatively sheltered position within the Hauraki Gulf means this is not generally a negative factor for the GI's vineyards. Air movement from wind is generally west to east, with sprir the windiest season and the autumn harvest period relatively settled, whilst sea breezes move in t opposite direction: eastwards across the island and onto the mainland land mass. Sea breezes occu in the afternoon, particularly in the warmer, more settled November-March period. These also ass with reducing disease pressure via increased air movement in the warmest parts of the day.

## Methods of producing wines and spirits

Human factors such as viticulture, winemaking or spirit-making practices may also be relevant. These factors are likely to be linked closely to natural factors such as steep, inaccessible terrain which can mean that less mechanisation is feasible. This in turn may



mean that the wines or spirits from that area must be premium goods that are sold at a high price point in order to be profitable.

27	Comment(s):	
21	comment(s).	
	Due to difficult terrain there is no mechanical harvesting in the GI. Given the of water there is little irrigation of vineyards and majority are dry farmed. The ensure quality yields are restricted to between 1-2 tonnes pre-acre for red varieties and 1.5-2.5 tonnes per-acre for white wines. Declarant discusses winemaking in details (page 10):	То
	Viticulture and winemaking Viticultural practices within the WAIHEKE ISLAND GI are adapted to the production of ultra-premium wines from specific grape varieties in the range of physical environments that exist within the GI.	
	Vines are planted at densities of anywhere between 2500-4500 vines per hectare on Waiheke Island. Most vineyards are situated on hillside slopes, so narrow row widths are not too much of an issue. Generally cane pruning is employed, with some spur pruning seen. For reasons of quality and due to the difficult terrain, there is no mechanical harvesting within the WAIHEKE ISLAND GI, all harvesting is carried out by hand.	
	Due to the lack of water source on the island, there is very little irrigation of vineyards; the vast majority are dry farmed.	
	In order to ensure that grapes are of the highest quality, yields are typically restricted to between 1 and 2 tonnes per acre for red grape varieties and 1.5 to 2.5 tonnes/ per acre for white wines.	
	Winemaking practices are also adapted to making ultra-premium wines within the specific environments of the GI. Wines are made in small batches, often predominantly from single vineyards or vineyards owned by the winery.	
	Winemaking practices vary significantly from winery to winery. White wines such as Chardonnay are typically barrel fermented and aged, while varieties like Pinot Gris and Viognier can also be partially or fully barrel fermented and/or aged, or tank fermented and aged.	
	Red wines are typically aged in oak for periods of up to two years. Reds can be macerated on their skins for extended periods resulting in wines with significant aging ability. In many cases, wines are made and bottled on the property, but due to logistical challenges of making wine on an island, many wines are bottled in Auckland	
	Most, if not all, vineyards and wineries on Waiheke are accredited with Sustainable Winegrowing New Zealand, which shows the commitment to our unique environment.	



## Quality

The qualities of a wine or spirit from a particular area may include its aroma, flavour profile, sweetness, acidity, tannin, fruit, colour, structure, body, texture and viscosity, alcohol by volume, cellaring potential, typicity, signature characteristics, and varietals.

28	Comment(s):
	Wines from GI have recognisable and consistent sensory characteristics across a range of varieties and styles. (Page 2)
	Sensory attributes: -The Declarant's evidence includes descriptions of the sensory attributes typically associated with wines from the WAIHEKE ISLAND GI. However, as this information has been provided by a person other than the declarant (namely Master of Wine Emma Jenkins) and is essentially hearsay, we are placing a low weighting on this information (Pages 10-11)

## Reputation

Where relevant, applicants should provide evidence that demonstrates the extent of the reputation of the wines or spirits from the relevant geographical area. This may include, for example:

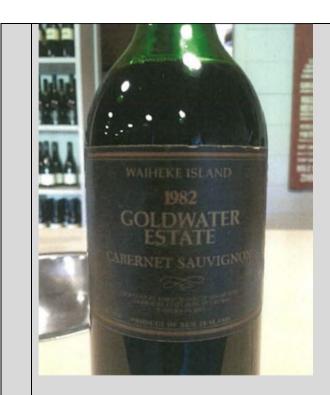
- Evidence that wines or spirits are sold and/or promoted by reference to the GI.
- Statements from chambers of commerce and industry or other trade and professional associations that the wine or spirit has a reputation that is essentially attributable to its origin.
- Evidence that the GI influences consumer purchasing decisions.
- Evidence of tourism linked specifically to the wines or spirits from the relevant area, such as vineyard or distillery tours.
- Sales figures, export figures and/or market share (may be provided on a confidential basis).
- Marketing spend (may be provided on a confidential basis) and marketing activities such as advertising, tastings and other promotional events.
- References to the GI in books, articles, blogs, social media, websites and menus from restaurants and bars.



• Evidence of national and international awards won by wines and/or spirits from the relevant geographical area.

29	Comment(s):
	Boundary
	The geographical indications boundary claimed appears to fall within what is generally considered to be Waiheke Island.
	Reputation
	In terms of the submitted evidence, we are of the view that the evidence of reputation of the wines from the area to which the GI relates constitutes the strongest case for accepting the GI.
	High cost/ Low production/ "boutique" Ultra-Premium product
	Declarant confirms high-cost of production (Page 4)
	Making wine in the WAIHEKE ISLAND GI is expensive – even within the context of New Zealand, which is itself a high-cost producer in global terms. <sup>1</sup>
	High cost caused by (Page 4): -High valve of land (competition with accommodation) -Sloping sites -Sourcing and transporting labour and other inputs -Transporting finished goods to market -Low yields/ High cost per tonne.
	Given high cost of production for GIs wines the area must operate as an ultra-premium wine region.
	Use of the GI on wine goods
	Note first use confirmed by declarant in 1982 (page 12):





Further examples of wine labels provided (Appendix 2), some shown below. Consider there are sufficient examples showing clear use of the GI WAIHEKE ISLAND in relation to the goods. Further examples from Office research (Box 3)









# PROPERTY OFFICE

## Marketing

There are a number of marketing activities which promote the WAIHEKE ISLAND GI.

Annual "Waiheke Island of Wine Expo" held in downtown Auckland since 2009. Waiheke Island producers display their products, provide tastings. Discussed by Declarant in page 12:

An annual "Waiheke Island of Wine Expo" has been held in downtown Auckland since 2009. 15 - 18 Waiheke Island wine producers hold a joint wine tasting targeting the media, trade and general public. There are generally 200 attendees. The Auckland trade and media session starts in the early afternoon, with the public session later in the afternoon. The public pay an entrance fee which helps finance the event. The winemakers use it as an opportunity to release their latest vintages and to show off any recent award-winning wines.

Annual Waiheke Wine and Food Festival held since 2014 during grape harvest. Public event with 15-18 vineyards taking part. 2016/2017 there was 2000 attendees. Discussed on pages 12 and 13:

A Waiheke Wine and Food Festival has been held on Waiheke Island since 2014 during the annual grape harvest. This offers the public the opportunity to take part in events like "Grape Harvest and Foot stomping", wine and food matching events, vertical wine tastings and Opera dinners. In April

2016 and 2017 we held a centralised wine festival event with 15 to 18 different Waiheke Island vineyards and 12 artisan food producers taking part. There were 2000 attendees who enjoyed tasting wine and food while listening to four different live bands amongst the vines of the Onetangi valley.

Waiheke Island wine trail map is re-printed yearly and the website www.waihekewine.co.nz centralised source of information of vineyard on the GI. (Page 13).

In 2007 the Applicant applied and registered certification trade mark (767795). More information see (Box 3) below.



## Use of GI in national and international texts

Declarant at Appendix 3 confirms the GI has been recognised in national and international texts. See examples below. The GI has also referenced in national and international periodical, online media and by wine experts (See Pages 14).

## Waiheke Island

Situated in the Hauraki Gulf, Waiheke Island, the trip takes 40 minutes on regular commuter ferries that depart hourly from downtown Auckland. This voyage, along with a tour to three or four vineyards, has become one of the must-do experiences for visitors to Auckland.

NE

World-class Bordeaux-style blends, sea-to-table fare and pristine beaches are just a 20-minute ferry ride from Auckland. Here's your gourmet guide to exploring this still-untamed wine oasis.

ZEALAND'S WAIHEKEISIAND

## Sensory characteristics

Wines from GI have recognisable and consistent sensory characteristics across a range of varieties and styles.

Clay-based soils

Clay soils are though to aid "mouth feel and structure" in GIs wines.

<u>Tourism</u>

The GIs ultra-premium wines, as well as the areas attractiveness and accessibility are a



draw-card for tourists. Note Waiheke Island has 900,000 tourists per year. Tourism in the GI is linked specifically to wine and aids to the reputation of the GI (Page 12).

### Other relevant information:

	Comment(s):						
	Applicant (The Waiheke Winegrowers Association Inc.) owns certification TM 767795. (See screen shot below). Criteria for user to become certified:						
	<ol> <li>That they are made from 100% Waiheke Island grapes</li> <li>That the grapes are grown in vineyards that are members of an internationally recognised and audited sustainability programme</li> </ol>						
	3. That the wine has met the sensory evaluation, fault analysis and winery audit standards which apply for Export Eligibility						
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	767795 - TRADE MARK -         Bibliographical Data       Activities         7 Case Data       Activities         7 Case Data       Activities         7 Case Data       Activities         7 Total Case       Bibliographical Data       Activities         9 Determine       Status       Activities         9 Application Type       Mark Information       Series         Maori Trade Mark       Mark Name       Mark Type         Picture       Statement of Use       Goods & Services Specification         Pre-Approved Specification       Pre-Approved Specification	VATHEKE ISLAND CE         Discussions       History       Docurity         02-330-3313       767795         Expired but restorable       Certification         Rational       Antional         *Yes       No         Mumber of Marks in this Series       Yes         *Yes       No         WAHEKE ISLAND CERTIFIED WI       Combined         Combined       Combined         The mark is being used or proper       1         33       No         9       9	ERTIFIED WINE ; WAIHEKE IS ments Examination 2 2 1 2 1 NE ; WAHERE ISLAND CERTIFIED WINE Source of the be used, by the applicant or with hig/her Coods and Services Desce Coods and Services Desce	SLAND CERTIFIED WINE Submission Date Filed/Designation Date Acceptance Date Publication Date Registered/Protected on Deemed Date Of Registration Renewal Due Date consent, in relation to the goods/services	03 May 2007 03 May 2007 14 Jul 2010 30 Jul 2010 06 Nov 2010 03 May 2007		
	767795 - TRADE MARK -         Bibliographical Data       Activities         7 Case Data       Activities         7 Reference       IP Number         Status       Status         Nature       Application Type         7 Mark Information       Series         Maori Trade Mark       Mark Name         Mark Name       Mark Type         Picture       Statement of Use         Goods & Services Specification       Pre-Approved Specification         Pre-Approved Specification Schedule       Schedule	WATHEKE ISLAND CE       Discussions     History     Docur       02-320-3313     76775       Expired but restorable     Expired but restorable       Certification     Rational       *Yes<	ERTIFIED WINE ; WAIHEKE IS ments Examination 2 2 1 2 1 NE ; WAHERE ISLAND CERTIFIED WINE Source of the be used, by the applicant or with hig/her Coods and Services Desce Coods and Services Desce	SLAND CERTIFIED WINE Submission Date Filed/Designation Date Acceptance Date Publication Date Registered/Protected on Deemed Date Of Registration Renewal Due Date consent, in relation to the goods/services	03 May 2007 03 May 2007 14 Jul 2010 30 Jul 2010 06 Nov 2010 03 May 2007		









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31	Examiner is satisfied that the Applicant has provided	$\boxtimes$	Yes	No
	sufficient explanation and			
	evidence of: the quality, reputation or other			
	characteristic of the wine or spirit that is essentially			
	attributable to the GI			

32	Recommend for Acceptance?	$\boxtimes$	Yes		No
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This Summary may not explicitly refer to every matter that has been considered by the Examiner