



Status of Wine-grape Vines as on 31 December 2011

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Statistics i.r.o. South African wine grape vineyards over the past 10 years (2006 - 2011)

Contents

1 Overview.....	3
Figure 1: Total surface planted to wine grape vineyards in the industry.....	3
Figure 2: Distribution of wine grape vineyards as a percentage (%) per district (2011).....	5
Figure 3: Percentage (%) white and red wine grape vineyard hectares per district (2011).....	5
Figure 4: Percentage (%) white and red wine grape vineyard hectares.....	6
Figure 5: Surface i.r.o. most planted red varieties in the industry (2000 - 2011).....	7
Figure 6: Surface i.r.o. most planted white varieties in the industry (2000 - 2011).....	7
Figure 7: Plantings and uprooting i.r.o. red and white wine grape vineyards in the industry (2006 - 2011).....	7
Figure 8: Age distribution of white and red wine grape vineyards (2011).....	8
Table 1: Plantings of selected wine grape varieties for 2001 and 2011.....	4
Table 2: Distribution of wine grape vineyard (red & white) per district as a percentage (%) and hectares of the total SA wine grape vineyard surface (2001 - 2011).....	5
Table 3: Red and white wine grape vineyard distribution per district as a percentage (%) of the surface in each district (2001 and 2011).....	6
Table 4: Surface i.r.o. most planted varieties in the industry (2001 and 2011).....	6
Table 5: Age distribution of vines per region per variety group for 2011 - % (Excluding Sultana).....	8
Table 6: Replacement per hectares per wine region at an annual rate of 5% - 2011 (Excluding Sultana).....	8

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White and Red Varieties planted and uprooted

Status of Red and White varieties

1 Overview

Total hectares for 2011 stand at 100 568 ha compared to 101 016 ha in 2010. This represents a decrease of 448 ha. Until 2006 the total surface showed an annual increase; since then a steady decrease totaling 1 578 ha.

Pinotage has shown an increase of 295 ha, moving from 8th to 7th place (Table 1). Chenin blanc and Cabernet Sauvignon remain the most planted varieties.

For the period 2001 – 2011 the vineyard area as a percentage of the total area increased in Robertson, while decreasing in Paarl, Malmesbury and Stellenbosch (Table 2). Over the past 9 years there was no significant change in the hectare percentage white and red wine grapes (Figure 4). The total hectares red wine grapes increased since 2001 with 8 percentage points at the cost of white wine grapes (Table 3).

Regarding individual wine grape varieties, Chenin blanc represented 19.8% of the total wine surface in 2001, Colombar 10.4%, Cabernet Sauvignon 9.8%, Pinotage 6.5%, Chardonnay 5.6%, Shiraz 6.7%, Sauvignon blanc 5.4%, followed by the varieties detailed in Table 4. In 2011 Chenin blanc (18.2%) decreased significantly. Red varieties such as Cabernet Sauvignon and Shiraz increased significantly over this period.

As mentioned before a great concern is that since 2005 the industry has not been able to replace an annual 5%, about 5 000 ha, of existing vineyards. A life span of 20 years serves as guideline, but according to role players this is especially with regard to red varieties not attainable and a life span of 15 years is considered to be more realistic. Figure 8 and Table 5 gives an overview of the situation.

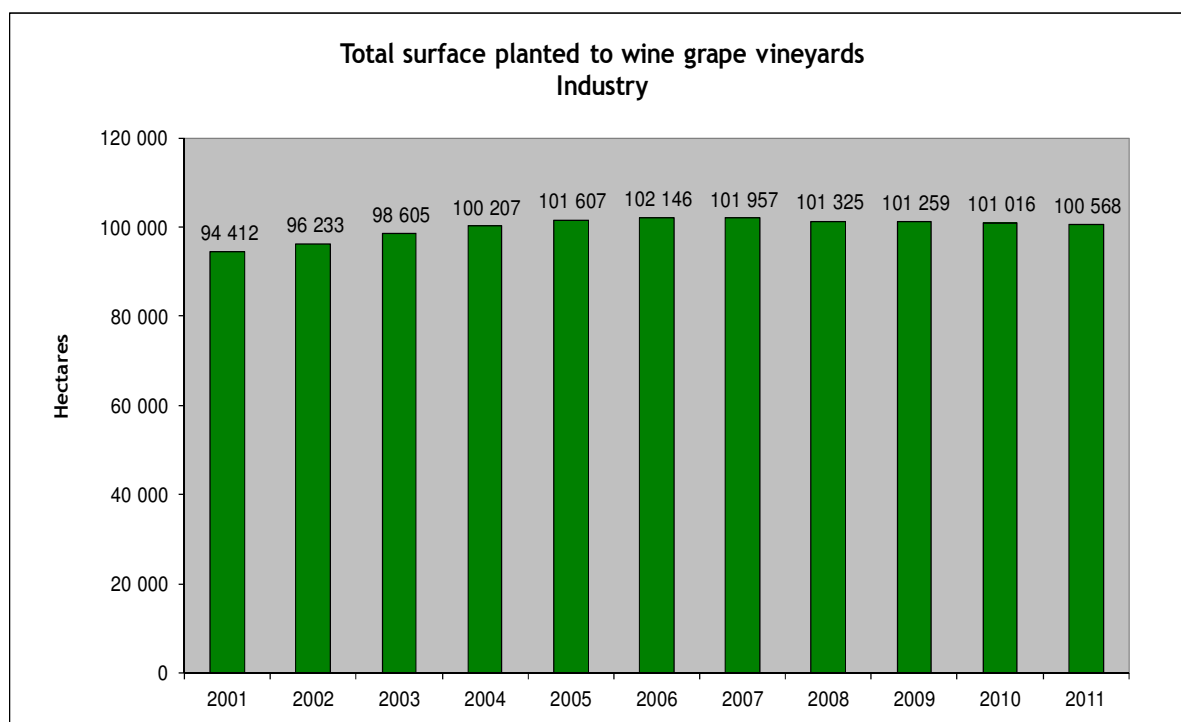


Figure 1: Total surface planted to wine grape vineyards in the industry

No	VARIETY	2001 (ha)	2011 (ha)	No	VARIETY	2001 (ha)	2011 (ha)
1	CHENIN BLANC (STEEN)	21 099.55	18 325.62	50	ZINFANDEL (PRIMITIVO)	28.41	32.24
2	CABERNET SAUVIGNON	10 389.83	12 104.12	51	MORIO MUSCAT	25.91	30.88
3	COLOMBAR	11 072.49	11 857.09	52	VERDELHO	3.26	25.55
4	SHIRAZ (SYRAH)	7 078.10	10 320.54	53	NEBBIOLO	14.65	25.09
5	SAUVIGNON BLANC (BLANC FUME)	5 758.36	9 644.43	54	TINTA AMARELLA	0.91	21.96
6	CHARDONNAY	5 989.57	8 092.35	55	PINOT BLANC (WEISSBURGUNDER)	28.39	14.46
7	PINOTAGE	6 879.90	6 535.26	56	GAMAY NOIR	33.17	14.18
8	MERLOT	5 705.58	6 415.93	57	WINE GRAPE VARIETY	39.41	13.36
9	RUBY CABERNET	2 280.69	2 192.72	58	MEUNIER (PINOT MEUNIER)	6.00	12.69
10	MUSCAT D'ALEXANDRIE (HANEPOOT)	3 600.37	2 084.32	59	HANEPOOT (RED)	4.38	12.59
11	CINSAUT	3 367.67	1 980.20	60	SEMILLON (RED)	3.29	11.66
12	SEMILLON (GROENDRUIF)	987.84	1 192.65	61	KANAAN (BELIES,CANAAN)	87.21	11.14
13	PINOT NOIR	508.97	1 019.43	62	WELDRA	37.58	11.05
14	CABERNET FRANC	541.00	910.36	63	MUSCAT OTTONEL	31.76	10.36
15	VIOGNIER	94.54	880.99	64	ALICANTE BOUSCHET	8.01	9.98
16	MUSCAT DE FRONTIGNAN (MUSKADEL)	716.24	676.07	65	CINSAUT BLANC (ALBATROS)	30.40	6.48
17	PETIT VERDOT (VERDOT)	204.77	674.55	66	CARMENERE	0.00	3.60
18	CROUCHEN (CAPE RIESLING)	1 784.12	584.90	67	COLOMINO	9.24	3.22
19	MALBEC	229.68	454.07	68	TOURIGA FRANCA	2.39	3.18
20	NOUVELLE	3.62	425.98	69	PORT VARIETY	7.87	3.13
21	MATARO (MOURVEDRE)	32.98	415.42	70	GRENACHE (GRIS)	0.00	2.57
22	MUSKADEL (RED)	360.91	383.56	71	GRACHEN	2.77	2.30
23	CLAIRETTE BLANCHE	686.33	276.88	72	BOURBOULENC	4.61	2.20
24	PINOT GRIS (RULANDER)	93.75	276.40	73	PEDRO LUIS (VALSE PEDRO)	62.50	2.08
25	VILLARD BLANC	7.14	234.82	74	PONTAK (TEINTURIER MALE)	8.51	1.94
26	TINTA BAROCCA	378.63	221.32	75	TINTA FRANCISCA	1.24	1.89
27	PALOMINO (FRANSDRUIF)	1 119.01	219.55	76	GRACIANO	0.00	1.51
28	GRENACHE (RED)	33.39	207.72	77	SYLVANER	7.49	1.09
29	WEISSER RIESLING	417.09	189.39	78	CORNIFESTO	1.30	0.96
30	ROOBERNET	105.59	137.43	79	RIESLING TROLL	0.00	0.81
31	GEWURZTRAMINER	205.67	117.39	80	KERNER	13.99	0.68
32	FERNAO PIRES	304.15	110.52	81	FLORA	0.25	0.60
33	TOURIGA NACIONAL	43.30	103.55	82	SCHONBURGER	1.93	0.32
34	THERONA	162.66	94.23	83	GRAND NOIR DE LA CALMETTE	0.00	0.15
35	EMERALD RIESLING	277.64	88.23	84	BASTARDO DO CASTELLO	0.03	0.03
36	CARIGNAN	68.40	86.57	85	KEUKA	0.01	0.00
37	UGNI BLANC (TREBBIANO)	120.35	80.34	86	OTHELLO	3.67	0.00
38	TANNAT	1.67	74.77	87	CINSAUT GRIS	0.04	0.00
39	CHENEL	270.04	74.10	88	PERRICONE	0.01	0.00
40	BUKETTRAUBE	247.13	69.37	89	FURMINT	17.78	0.00
41	SANGIOVESE	42.21	61.03	90	VITAL	0.26	0.00
42	GRENACHE BLANC	23.67	54.76	91	FOLLET	0.26	0.00
43	TEMPRANILLO (TINTA RORIZ)	17.68	53.04	92	MULLER-THURGAU	2.45	0.00
44	HARSLEVELU	218.97	50.98	93	CSERSZEGI FUSZ	0.01	0.00
45	BARBERA	20.21	50.81	94	BRAKBOSEILAND	0.75	0.00
46	SOUZAO	41.54	46.50	95	OLASZ	0.29	0.00
47	ROUSSANNE	0.00	46.40	96	AUXERROIS	6.37	0.00
48	RAISIN BLANC (GROS VERT) (SERVAN BLANC)	280.50	42.52				
49	DURIF (PETIT SIRAH)	0.05	32.76		Total	94412.31	100567.87

Table 1: Plantings of selected wine grape varieties for 2001 and 2011

District	%	2001 (ha)	%	2011 (ha)
Little Karoo	3%	2,974	3%	2,724
Orange River	5%	4,900	5%	4,962
Olifants River	10%	9,109	10%	10,037
Robertson	13%	12,095	14%	14,330
Malmesbury	15%	14,160	14%	14,042
Paarl	18%	17,228	16%	16,371
Stellenbosch	18%	16,582	17%	16,827
Worcester	18%	17,364	9%	8,647
Breedekloof	0%	-	13%	12,627
Total	100%	94,412	100%	100,568

* Breedekloof was part of Worcester district in 2001

Table 2: Distribution of wine grape vineyards (red & white) per district as a percentage (%) and hectares of the total SA wine grape vineyards surface (2001 - 2011)

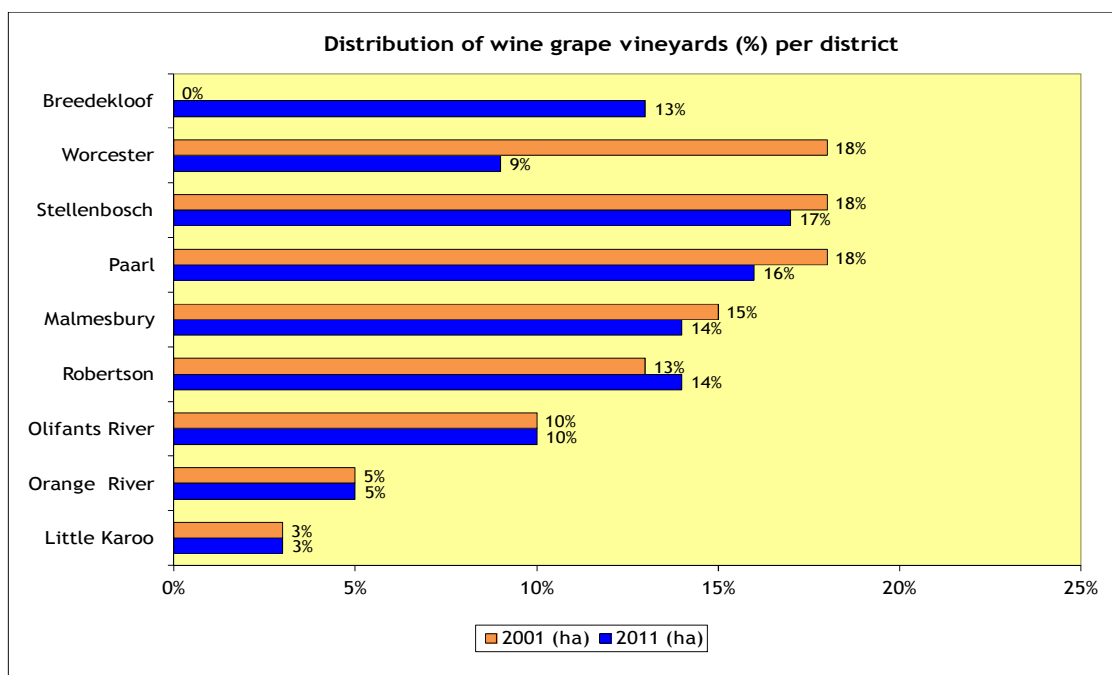


Figure 2: Distribution of wine grape vineyards as a percentage (%) per district (2011)

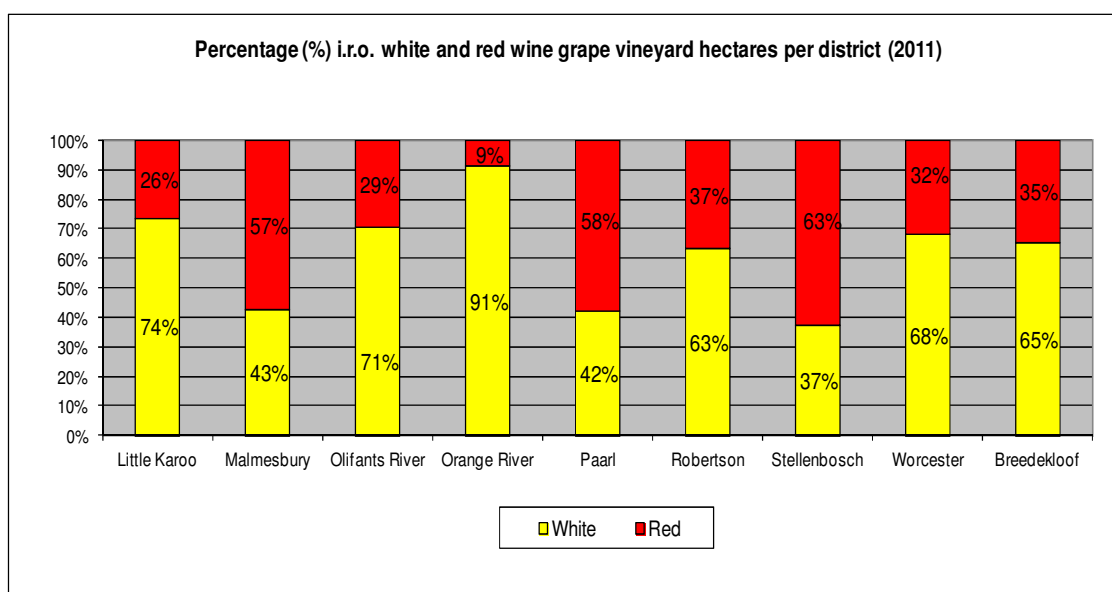


Figure 3: Percentage (%) white and red wine grape vineyard hectares per district (2011)

District	2001		2011	
	Red (ha)	White (ha)	Red (ha)	White (ha)
Little Karoo	20%	80%	26%	74%
Malmesbury	47%	53%	57%	43%
Olifants River	32%	68%	29%	71%
Orange River	11%	89%	9%	91%
Paarl	50%	50%	58%	42%
Robertson	32%	68%	37%	63%
Stellenbosch	59%	41%	63%	37%
Worcester	31%	69%	32%	68%
Breedekloof	-	-	35%	65%
Total	41%	59%	44%	56%

Table 3: Red and white wine grape vineyard distribution per district as a percentage (%) of the surface in each district (2001 and 2011)

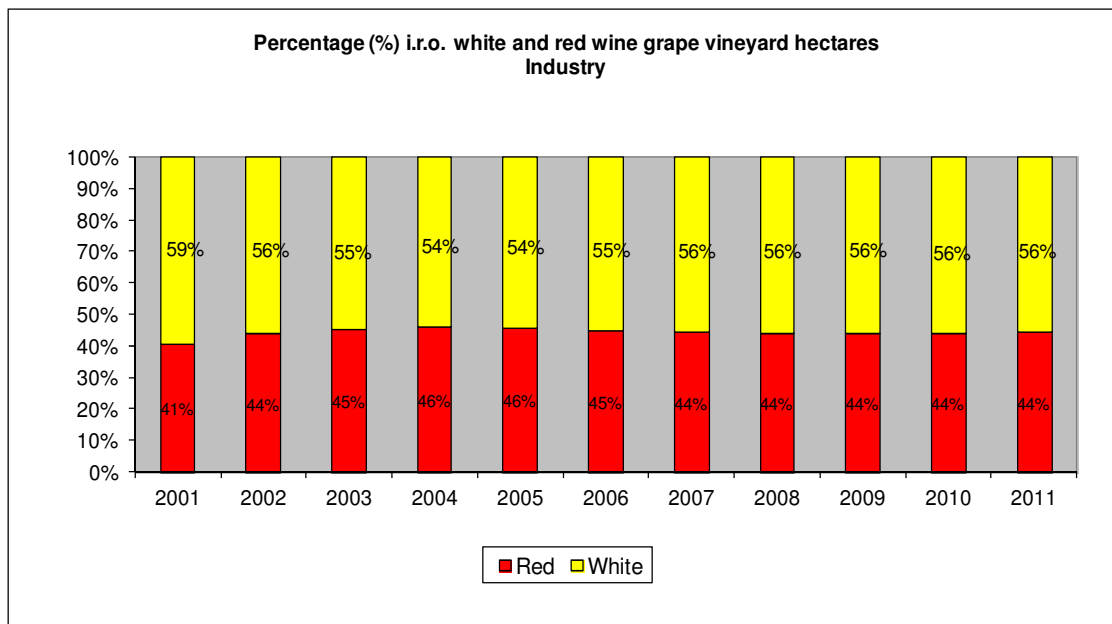


Figure 4: Percentage (%) white and red wine grape vineyard hectares

Variety	2001		2011		Change since 2001 (Ha)
	Hectares	% of total	Hectares	% of total	
Chenin blanc	21,100	22.3%	18,326	18.2%	-2,774
Cabernet Sauvignon	10,390	11.0%	12,104	12.0%	1,714
Colombar	11,072	11.7%	11,857	11.8%	785
Shiraz (Syrah)	7,078	7.5%	10,321	10.3%	3,242
Sauvignon blanc	5,758	6.1%	9,644	9.6%	3,886
Chardonnay	5,990	6.3%	8,092	8.0%	2,103
Merlot	5,706	6.0%	6,416	6.4%	710
Pinotage	6,880	7.3%	6,535	6.5%	-345
Ruby Cabernet	2,281	2.4%	2,193	2.2%	-88
Muscat d'Alexandrie (White Hanepoot)	3,600	3.8%	2,084	2.1%	-1,516
Cinsaut	3,368	3.6%	1,980	2.0%	-1,387
Crouchen (Cape Riesling)	1,784	1.9%	585	0.6%	-1,199
Palomino (White French)	1,119	1.2%	220	0.2%	-899
Other	8,287	8.8%	10,211	10.2%	1,924
Total	94,412	100%	100,568	100%	6,156

Table 4: Surface i.r.o. most planted varieties in the industry (2001 and 2011)

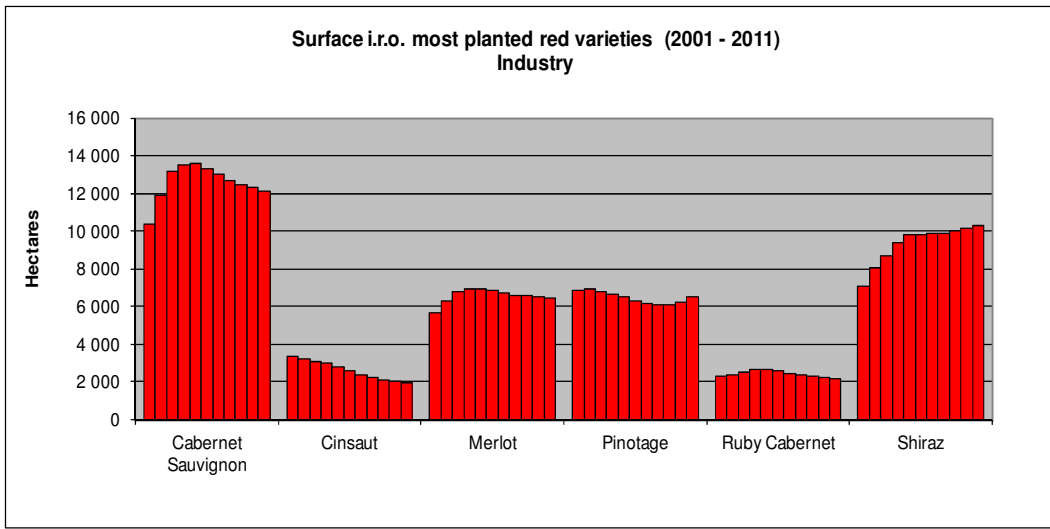


Figure 5: Surface i.r.o. most planted red varieties in the industry (2001 - 2011)

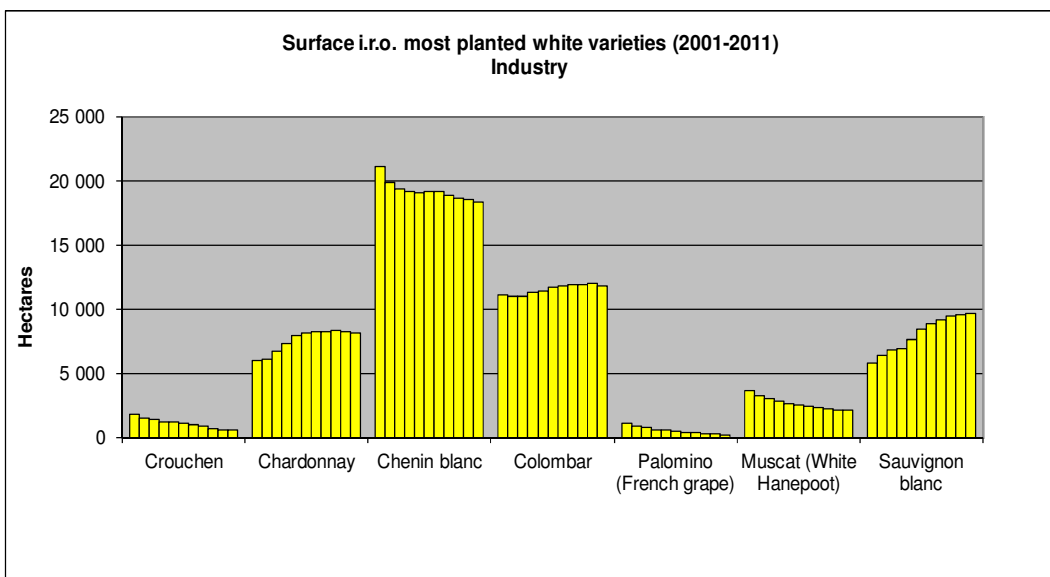


Figure 6: Surface i.r.o. most planted white varieties in the industry (2001 - 2011)

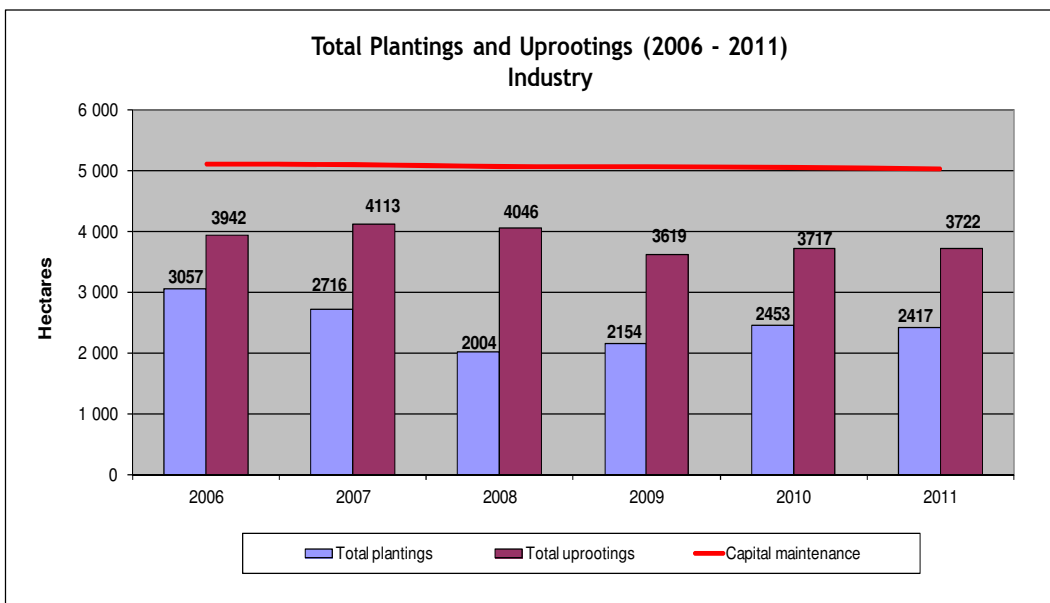


Figure 7: Plantings and uprooting i.r.o. red and white grape vineyards in the industry (2006 - 2011)

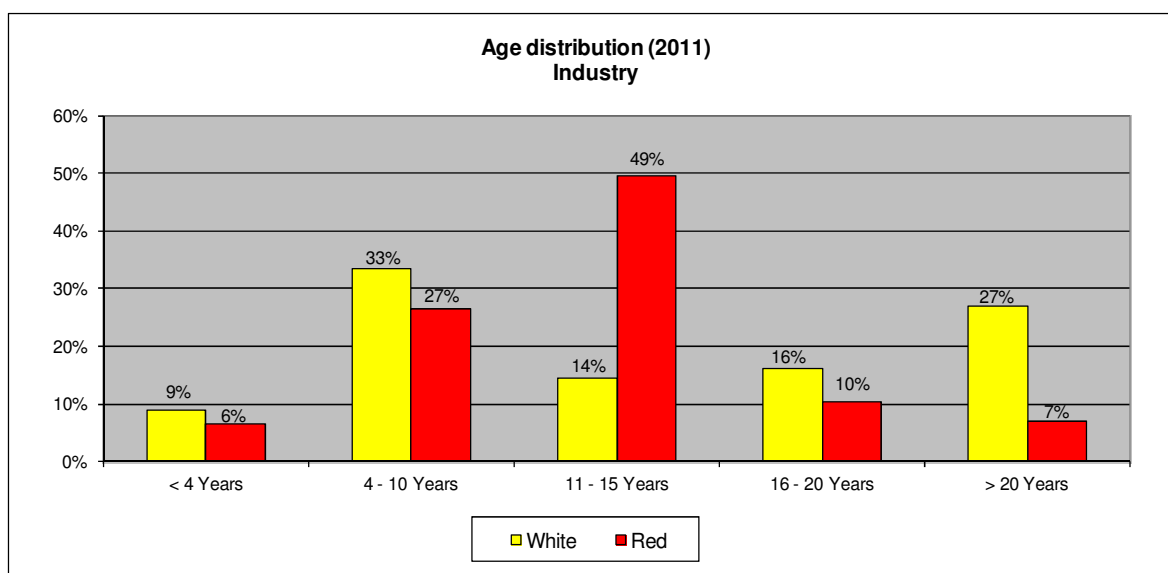


Figure 8: Age distribution of white and red wine grape vineyards (2011)

AGE OF VINES	HECTARES IN WINE REGION AS % OF TOTAL									
	TOTAL HECTARES	ORANGE RIVER	OLIFANTS RIVER	MALMES-BURY	LITTLE KAROO	PAARL	ROBERT-SON	STELLEN-BOSCH	WORCES-TER	BREED-KLOOF
< 4 Years	9.0	7.9	9.0	5.8	8.3	7.3	11.5	6.3	10.9	11.7
4 - 10 Years	33.4	24.6	30.7	30.9	33.9	29.9	37.7	33.6	43.5	33.4
11 - 15 Years	14.4	36.8	13.0	12.6	16.1	11.3	10.6	13.4	12.9	12.8
16 - 20 Years	16.3	13.6	22.7	14.1	17.4	11.9	19.7	11.1	14.1	18.7
> 20 Years	26.9	17.2	24.6	36.5	24.3	39.5	20.5	35.6	18.6	23.5
Total white varieties	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
< 4 Years	6.5	12.3	5.2	4.0	7.6	4.8	12.7	4.0	11.0	10.4
4 - 10 Years	26.6	24.4	17.6	24.2	31.1	29.3	24.3	28.2	33.0	25.6
11 - 15 Years	49.5	49.6	65.3	52.4	46.0	46.3	51.7	44.5	46.5	52.1
16 - 20 Years	10.4	8.6	8.4	12.6	7.3	11.8	7.3	11.7	7.0	8.5
> 20 Years	7.0	5.0	3.5	6.8	7.9	7.8	4.0	11.7	2.5	3.5
Total red varieties	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table 5: Age distribution of vines per region per variety group for 2011 - % (Excluding Sultana)

	HECTARES									
	TOTAL HECTARES	ORANGE RIVER	OLIFANTS RIVER	MALMES-BURY	LITTLE KAROO	PAARL	ROBERT-SON	STELLEN-BOSCH	WORCES-TER	BREED-KLOOF
Total white and red varieties	5028.4	248.1	501.9	702.1	136.2	818.5	716.5	841.4	432.3	631.4
Actual planted	2417.2	86.4	242.1	218.3	65.2	247.0	626.4	180.5	275.0	476.3

Table 6: Replacement per hectares per wine region at an annual rate of 5% - 2011 (Excluding Sultana)