



Status of Wine-grape Vines as on 31 December 2012

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Statistics i.r.o. South African wine grape vineyards over the past 10 years (2002 - 2012)

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White and Red Varieties planted and uprooted

Status of Red and White varieties

1 Overview

Total hectares for 2012 stand at 100 093 ha compared to 100 568 ha in 2011. This represents a decrease of 475 ha. Until 2006 the total surface showed an annual increase; since then a steady decrease totaling 2 053 ha.

Varieties remained relatively constant (Table 1). Chenin blanc and Cabernet Sauvignon remain the most planted varieties.

For the period 2002 – 2012 the vineyard area as a percentage of the total area decreased in Orange River district, while increasing in Olifants River, Stellenbosch and Robertson (Table 2). Over the past 10 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 2002 with 6 percentage points at the cost of white wine grapes (Table 3).

Regarding individual wine grape varieties, Chenin blanc represented 18.4% of the total wine surface in 2002, Colombar 10.2%, Cabernet Sauvignon 11.0%, Pinotage 6.4%, Chardonnay 5.7%, Shiraz 7.5%, Sauvignon blanc 6.0%, followed by the varieties detailed in Table 4. In 2012 Chenin blanc decreased to 18.2%. Sauvignon blanc, Shiraz, Pinot Noir and Nouvelle 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.

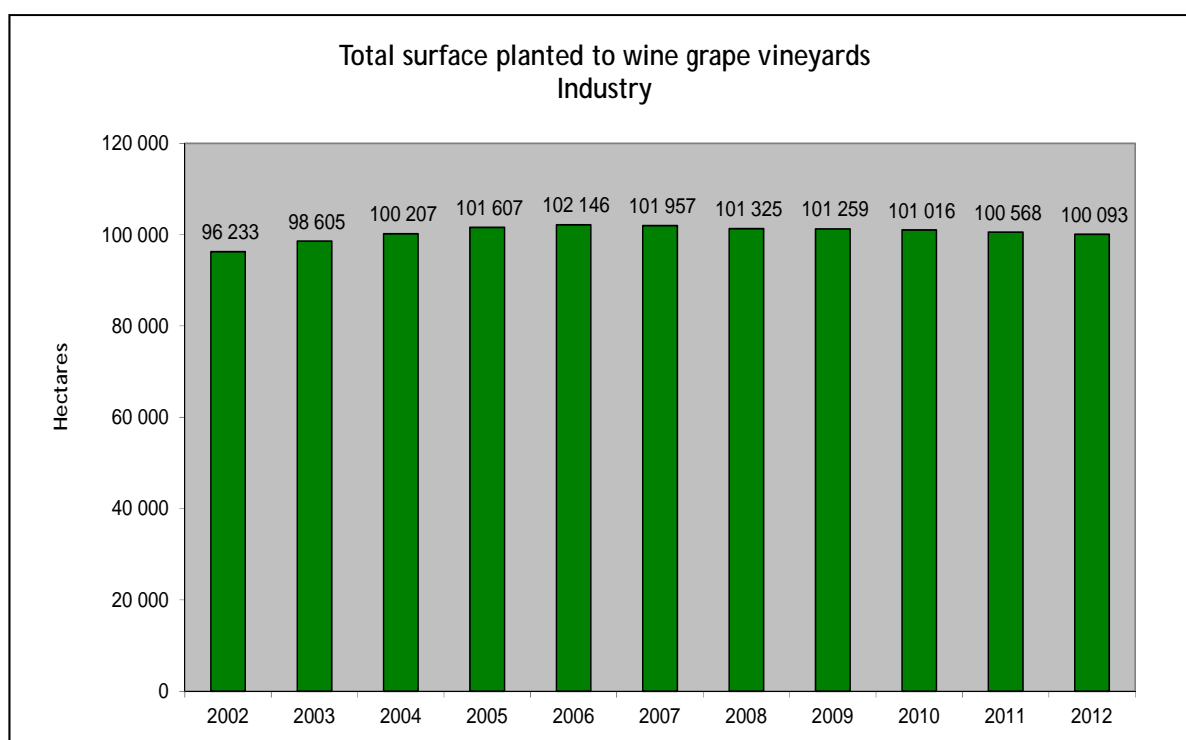


Figure 1: Total surface planted to wine grape vineyards in the industry

No	VARIETY	2002 (ha)	2012 (ha)	No	VARIETY	2002 (ha)	2012 (ha)
1	CHENIN BLANC (STEEN)	19 865.03	18 168.66	51	RAISIN BLANC (GROS VERT) (SERVAN BLANC)	216.21	32.22
2	CABERNET SAUVIGNON	11 902.20	11 823.25	52	MORIO MUSCAT	21.17	31.42
3	COLOMBAR	11 012.71	11 723.76	53	NEBBIOLO	17.85	24.42
4	SHIRAZ (SYRAH)	8 091.66	10 456.54	54	TINTA AMARELLA	0.91	18.77
5	SAUVIGNON BLANC (BLANC FUME)	6 449.68	9 471.87	55	MEUNIER (PINOT MEUNIER)	4.14	13.97
6	CHARDONNAY	6 129.15	7 875.82	56	GAMAY NOIR	37.16	13.93
7	PINOTAGE	6 912.17	6 921.22	57	WINE GRAPE VARIETY	22.77	13.25
8	MERLOT	6 331.98	6 319.14	58	SEMILLON (RED)	2.40	11.66
9	RUBY CABERNET	2 392.68	2 250.14	59	MUSCAT OTTONEL	23.51	10.36
10	MUSCAT D'ALEXANDRIE (HANEPOOT)	3 263.69	1 996.99	60	ALICANTE BOUSCHET	12.52	9.98
11	CINSAUT	3 201.86	1 936.41	61	WELDRA	35.83	9.37
12	SEMILLON (GROENDRUIF)	980.85	1 192.45	62	PINOT BLANC (WEISSBURGUNDER)	27.81	9.26
13	PINOT NOIR	535.59	1 088.73	63	HANEPOOT (RED)	4.59	8.54
14	VIOGNIER	236.99	884.32	64	GRACIANO	0.00	7.48
15	CABERNET FRANC	751.66	878.86	65	KANAAN (BELIES,CANAAN)	63.22	7.39
16	MUSCAT DE FRONTIGNAN (MUSKADEL)	688.95	729.33	66	IRSAI OLIVIER	0.00	6.83
17	PETIT VERDOT (VERDOT)	302.20	708.90	67	CINSAUT BLANC (ALBATROS)	18.54	6.48
18	CROUCHEN (CAPE RIESLING)	1 525.37	486.08	68	GRENACHE (GRIS)	0.00	6.16
19	MALBEC	323.52	458.66	69	MARSANNE	0.00	4.54
20	NOUVELLE	3.62	431.07	70	CARMENERE	0.00	3.60
21	MATARO (MOURVEDRE)	80.93	419.75	71	TOURIGA FRANCA	3.76	3.16
22	MUSKADEL (RED)	337.36	378.54	72	PORT VARIETY	7.18	3.13
23	PINOT GRIS (RULANDER)	87.02	308.63	73	GRACHEN	2.77	2.30
24	VILLARD BLANC	7.15	265.26	74	BOURBOULENC	4.61	2.20
25	CLAIRETTE BLANCHE	573.49	258.64	75	COLOMINO	8.65	2.10
26	GRENACHE (RED)	40.83	245.67	76	PEDRO LUIS (VALSE PEDRO)	20.31	2.08
27	TINTA BAROCCA	370.13	215.05	77	PONTAK (TEINTURIER MALE)	7.04	1.80
28	PALOMINO (FRANSRUIF)	865.30	200.42	78	CINSAUT GRIS	0.04	1.50
29	WEISSER RIESLING	346.51	182.98	79	TINTA FRANCISCA	0.85	1.45
30	ROOBERNET	120.82	158.60	80	GRAND NOIR DE LA CALMETTE	0.00	1.19
31	GEWURZTRAMINER	186.60	111.74	81	SYLVANER	2.63	1.09
32	TOURIGA NACIONAL	52.31	104.67	82	CORNIFESTO	1.88	0.85
33	FERNAO PIRES	257.15	101.06	83	RIESLING TROLL	0.00	0.81
34	UGNI BLANC (TREBBIANO)	99.32	93.84	84	KERNER	9.51	0.68
35	THERONA	143.97	87.44	85	FLORA	0.25	0.60
36	TANNAT	5.59	84.61	86	SCHONBURGER	0.61	0.32
37	CARIGNAN	77.58	84.52	87	BASTARDO DO CASTELLO	0.03	0.03
38	EMERALD RIESLING	243.97	82.32	88	KEUKA	0.01	0.00
39	TEMPRANILLO (TINTA RORIZ)	20.05	70.60	89	OTHELLO	3.18	0.00
40	BUKETTRAUBE	225.35	68.41	90	PERRICONE	0.01	0.00
41	CHENEL	227.38	67.69	91	FURMINT	15.98	0.00
42	GRENACHE BLANC	18.97	64.89	92	VITAL	0.26	0.00
43	SANGIOVESE	54.88	61.66	93	FOLLET	0.25	0.00
44	ROUSSANNE	0.00	51.96	94	MULLER-THURGAU	0.00	0.00
45	BARBERA	29.13	50.78	95	CSERSZEGI FUSZ	0.01	0.00
46	HARSLEVELU	173.08	46.81	96	BRAKBOSEILAND	0.75	0.00
47	SOUZAO	38.91	44.94	97	OLASZ	0.29	0.00
48	DURIF (PETIT SIRAH)	1.38	38.26	98	AUXERROIS	3.71	0.00
49	ZINFANDEL (PRIMITIVO)	39.10	33.18				
50	VERDELHO	4.14	33.15		TOTAL	96 233.16	100 093.19

Table 1: Plantings of selected wine grape varieties for 2002 and 2012

District	%	2002 (ha)	%	2012 (ha)
Little Karoo	3%	2 933	3%	2 643
Orange River	5%	4 747	5%	4 829
Olifants River	10%	9 261	10%	10 110
Robertson	13%	12 347	15%	14 550
Malmesbury	15%	14 482	14%	13 730
Paarl	18%	17 398	16%	16 202
Stellenbosch	18%	17 186	17%	16 526
Worcester	19%	17 878	9%	8 737
Breedekloof	-	-	13%	12 766
Total	100%	96 233	100%	100 093

* Breedekloof was part of Worcester district in 2002

Table 2: Distribution of wine grape vineyards (red & white) per district as a percentage (%) and hectares of the total SA wine grape vineyards surface (2002 - 2012)

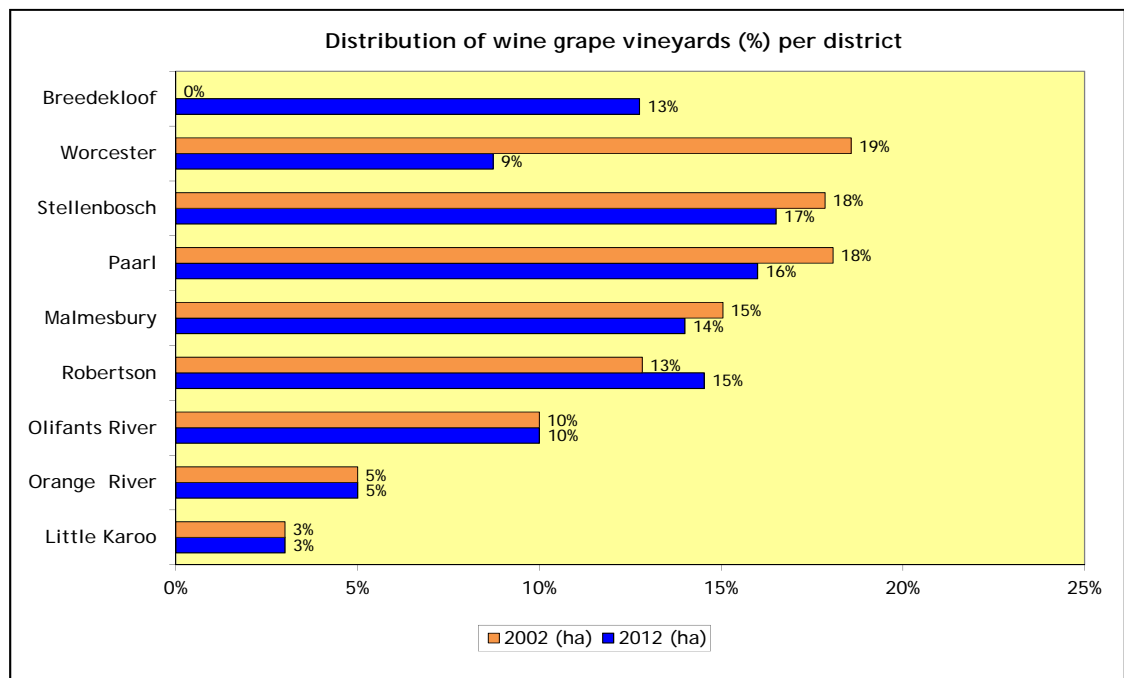


Figure 2: Distribution of wine grape vineyards as a percentage (%) per district (2012)

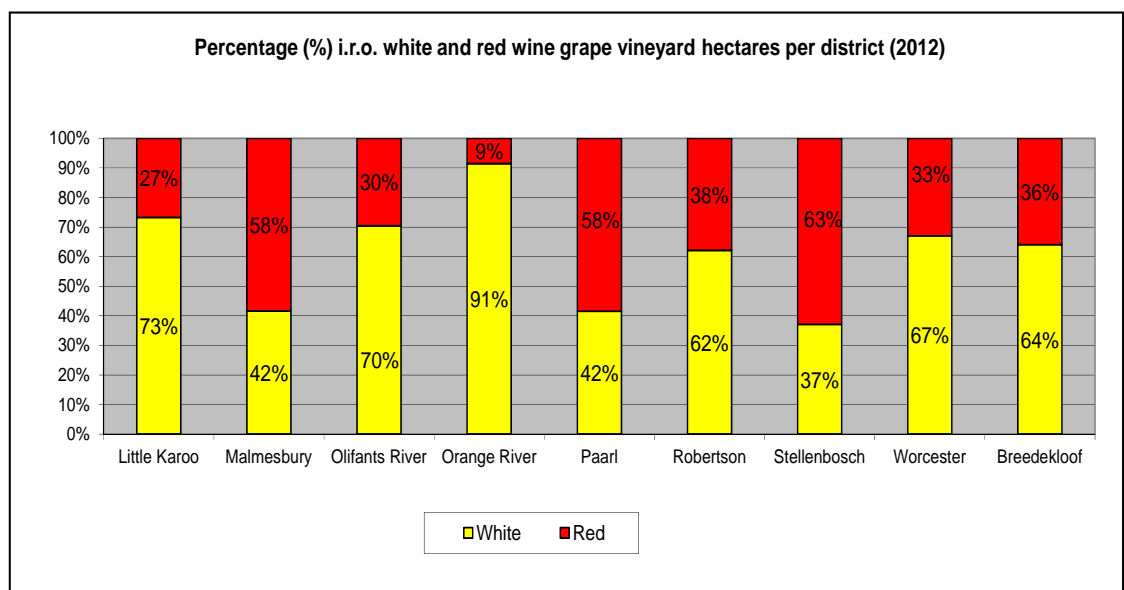


Figure 3: Percentage (%) white and red wine grape vineyard hectares per district (2012)

District	2002		2012	
	Red (ha)	White (ha)	Red (ha)	White (ha)
Little Karoo	24%	76%	27%	73%
Malmesbury	51%	49%	58%	42%
Olifants River	34%	66%	30%	70%
Orange River	11%	89%	9%	91%
Paarl	53%	47%	58%	42%
Robertson	35%	65%	38%	62%
Stellenbosch	63%	37%	63%	37%
Worcester	33%	67%	33%	67%
Breedekloof	-	-	36%	64%
Total	44%	56%	45%	55%

Table 3: Red and white wine grape vineyard distribution per district as a percentage (%) of the surface in each district (2002 and 2012)

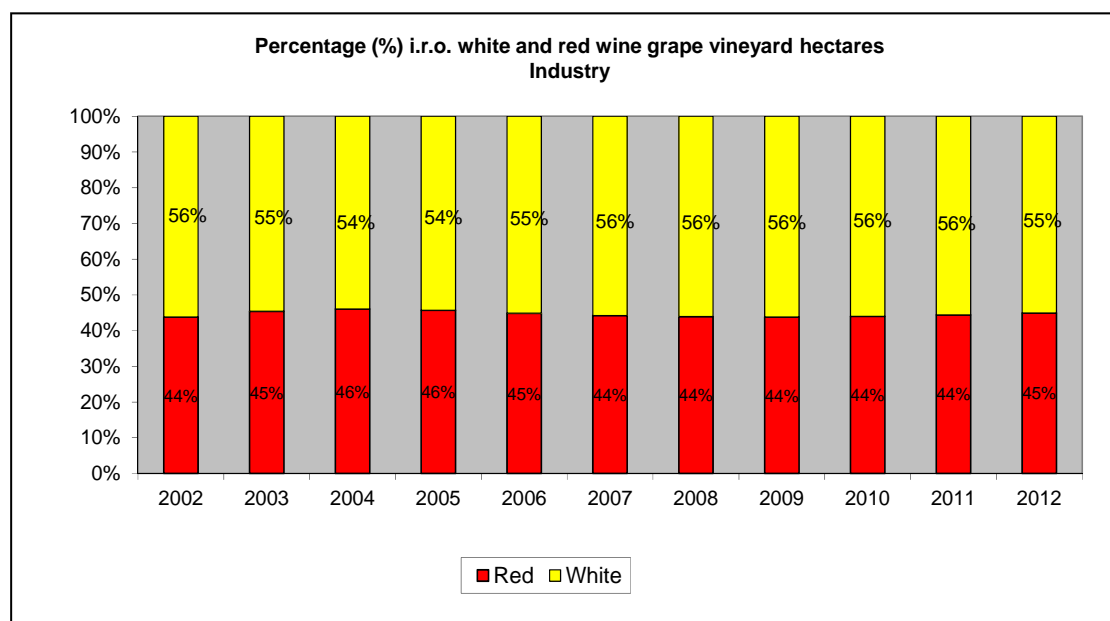


Figure 4: Percentage (%) white and red wine grape vineyard hectares

Oppervlak t o v mees aangeplante variëteite - 2001 en 2011 (Bedryf)					
Variety	2002		2012		Change since 2002 (Ha)
	Hectares	% of total	Hectares	% of total	
Chenin blanc	19 865	20.6%	18 169	18.2%	-1 696
Cabernet Sauvignon	11 902	12.4%	11 823	11.8%	-79
Colombar	11 013	11.4%	11 724	11.7%	711
Shiraz (Syrah)	8 092	8.4%	10 457	10.4%	2 365
Sauvignon blanc	6 450	6.7%	9 472	9.5%	3 022
Chardonnay	6 129	6.4%	7 876	7.9%	1 747
Merlot	6 332	6.6%	6 319	6.3%	-13
Pinotage	6 912	7.2%	6 921	6.9%	9
Ruby Cabernet	2 393	2.5%	2 250	2.2%	-143
Muscat d'Alexandrie (White Hanepoot)	3 264	3.4%	1 997	2.0%	-1 267
Cinsaut	3 202	3.3%	1 936	1.9%	-1 265
Crouchen (Cape Riesling)	1 525	1.6%	486	0.5%	-1 039
Palmino (White French)	865	0.9%	200	0.2%	-665
Other	8 290	8.6%	10 463	10.5%	2 173
Total	96 233	100%	100 093	100%	3 860

Table 4: Surface i.r.o. most planted varieties in the industry (2002 and 2012)

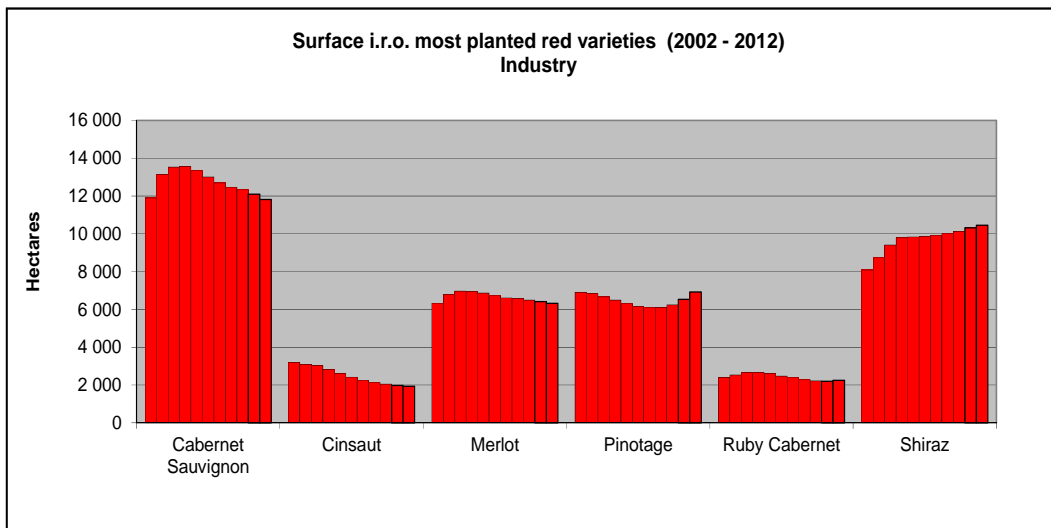


Figure 5: Surface i.r.o. most planted red varieties in the industry (2002 - 2012)

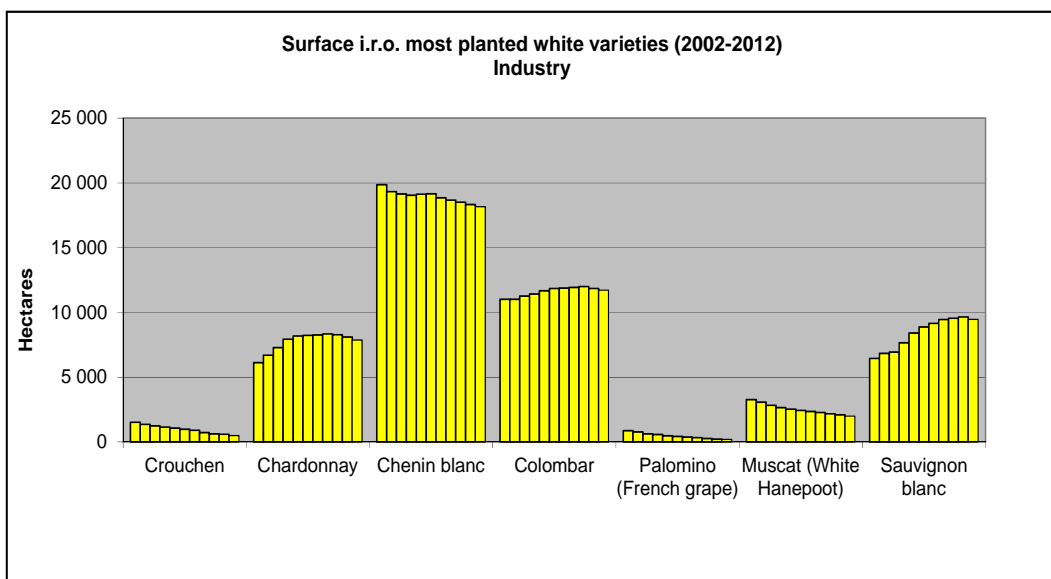


Figure 6: Surface i.r.o. most planted white varieties in the industry (2002 - 2012)

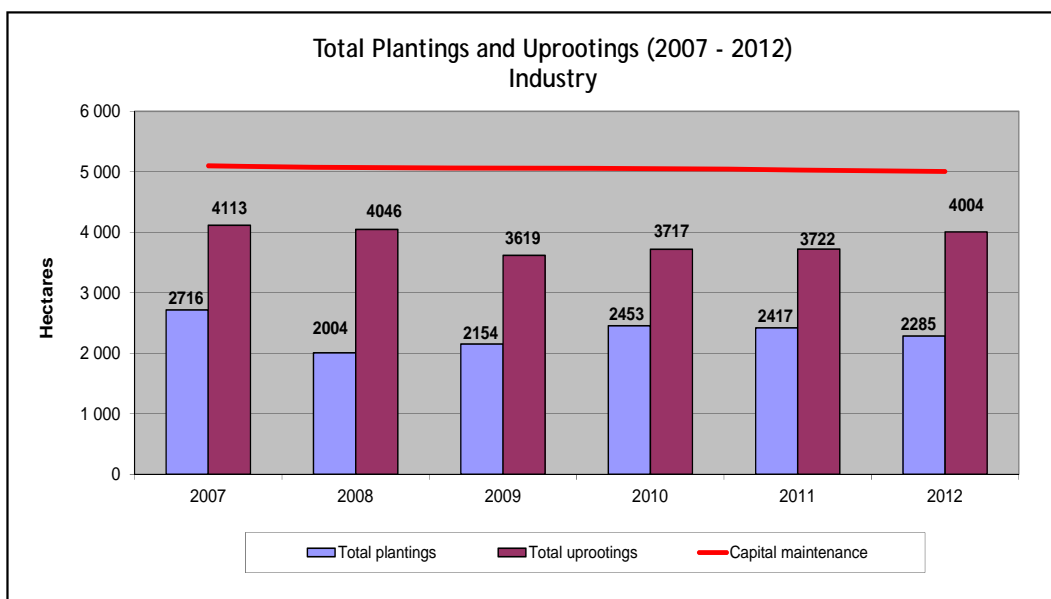


Figure 7: Plantings and uprooting i.r.o. red and white grape vineyards in the industry (2007 - 2012)

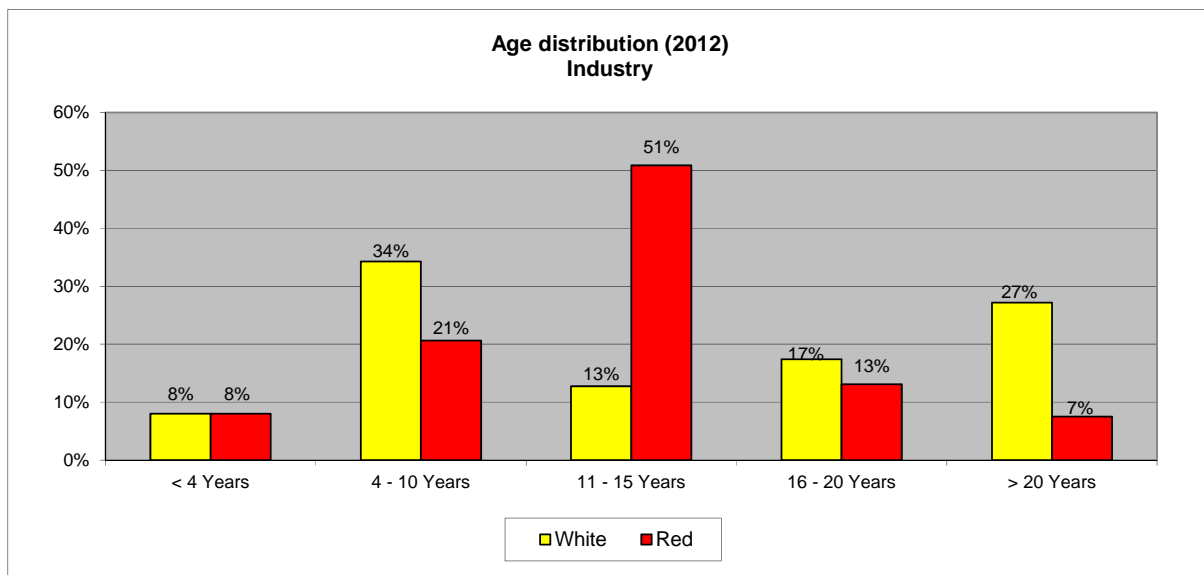


Figure 8: Age distribution of white and red wine grape vineyards (2012)

AGE OF VINES	HECTARES IN WINE REGION AS % OF TOTAL									
	TOTAL HECTARES	ORANGE RIVER	OLIFANTS RIVER	MALMESBURY	LITTLE KAROO	PAARL	ROBERTSON	STELLENBOSCH	WORCES-TER	BREED-KLOOF
< 4 Years	8.4	6.3	8.6	5.3	9.0	7.3	11.7	5.4	10.7	9.5
4 - 10 Years	34.3	26.6	30.5	32.8	34.7	29.6	37.8	33.6	44.5	35.7
11 - 15 Years	12.7	28.8	11.8	11.7	12.3	11.6	9.8	12.7	11.9	10.5
16 - 20 Years	17.4	21.3	22.2	15.3	19.5	13.5	19.3	12.8	13.8	19.2
> 20 Years	27.2	17.0	26.9	34.8	24.5	38.0	21.5	35.5	19.1	25.1
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	8.0	10.4	7.7	4.8	5.7	5.8	15.7	4.0	12.0	15.1
4 - 10 Years	20.6	23.5	13.2	17.7	26.6	23.1	19.0	20.9	31.7	18.5
11 - 15 Years	50.8	48.5	63.2	53.6	50.4	48.1	50.3	49.6	46.1	50.5
16 - 20 Years	13.1	11.7	11.6	16.5	9.9	14.9	10.2	13.2	6.9	12.2
> 20 Years	7.5	5.8	4.3	7.4	7.5	8.2	4.8	12.2	3.2	3.7
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 2012 - % (Excluding Sultana)

	Total Hectares	Little Karoo	Malmesbury	Olifants River	Orange River	Paarl	Robertson	Stellenbosch	Worcester	Breedekloof
Total white and red varieties	5004.7	132.1	686.5	505.5	241.4	810.1	727.5	826.3	436.8	638.3
Actual planted	2284.9	58.9	240.7	263.8	35.7	271.7	592.2	114.5	265.3	442.2

Table 6: Replacement per hectares per wine region at an annual rate of 5% - 2012 (Excluding Sultana)