



Statistics of Wine-grape Vines as on 30 November 2008

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Statistics i.r.o. South African wine grape vineyards over the past 11 years (1998 - 2008)

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1 Introduction

The aim and principal objective of this report is to provide an overview of grapevine plantings of South African wine grapes, as well as trends and changes that have occurred over the past 11 years (1998 - 2008). The information was compiled from Sawis' annual reports submitted by registered wine farmers in the wine industry. Seeing that only a portion of Sultana grapes is used for winemaking purposes, this variety was treated separately in the report. Muscat d'Alexandrie (Hanepoot) used as table grapes and for raisins, however, was taken into account as regards plantings. For the purposes of this report Worcester and Breedekloof districts are treated jointly as the Worcester district.

2 Total surface planted to wine grape vineyards (excluding Sultana)

From 1998 to 2008 the total hectares planted to wine grape vineyards have increased by almost 13% (11,390 hectares) from 89,935 hectares to 101,325 hectares. For the period until 2006 the total surface showed an annual increase, but over the past 2 years until 2008 the total surface has decreased by 189 hectares and 632 hectares per annum respectively.



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

Table 1: Plantings of selected wine grape varieties for 1998 and 2008

No	VARIETY	1998 (ha)	2008 (ha)	No	VARIETY	1998 (ha)	2008 (ha)
1	CHENIN BLANC	25,875.34	18,852.43	52	VERDELHO	0.84	22.02
2	CABERNET SAUV	5,614.90	12,697.46	53	PINOT BLANC	54.65	20.20
3	COLOMBAR	11,243.78	11,876.85	54	GAMAY NOIR	37.23	19.08
4	SHIRAZ (SYRAH)	1,999.08	9,906.77	55	NEBBIOLO	4.96	17.87
5	SAUVIGNON BLNC	4,965.54	9,155.22	56	WINE GRAPE VARIOUS	47.60	16.58
6	CHARDONNAY	5,721.65	8,255.37	57	WELDRA	66.92	15.45
7	MERLOT	2,624.81	6,613.82	58	MUSCAT OTTONEL	40.76	14.78
8	PINOTAGE	4,750.40	6,088.13	59	DURIF	0.02	13.69
9	RUBY CABERNET	1,207.78	2,380.97	60	ALICANTE BOUSCHET	1.53	13.05
10	MUSCAT d' ALEXANDRIE (HANEPOOT - WHITE)	4,918.01	2,345.79	61	TEMPRANILLO	12.80	11.42
11	CINSAUT	3,954.94	2,241.39	62	SÉMILLON (RED)	5.75	9.25
12	SÉMILLON	973.23	1,152.84	63	CINSAUT BLANC	89.42	7.49
13	CABERNET FRANC	326.74	978.94	64	MEUNIER	2.53	6.27
14	CROUCHEN (CAPE RIESLING)	3,138.58	894.62	65	SUGRATWELVE	-	5.36
15	VIOGNIER	5.03	859.10	66	STARLIGHT	-	4.71
16	PINOT NOIR	429.25	727.04	67	COLOMINO	17.35	4.58
17	MUSCADEL (WHITE)	790.10	668.13	68	PONTAC	11.46	4.18
18	PETIT VERDOT	24.54	634.31	69	PEDRO LUIS	136.31	3.70
19	MALBEC	29.30	450.14	70	TOURIGA FRANCA	0.33	3.46
20	PALOMINO (FRENCH GRAPE)	3,133.88	381.48	71	MUSCAT d' ALEXANDRIE (HANEPOOT - RED)	13.38	3.37
21	NOUVELLE	1.90	373.09	72	GRENACHE (GRIS)	-	3.23
22	MOURVÈDRE (MATARO)	1.70	358.81	73	OTHER PORT VARIETIES	5.93	3.13
23	MUSCADEL (RED)	451.50	335.86	74	GRACHEN	0.52	2.51
24	CLAIRETTE BLCH	1,535.32	327.69	75	BOURBOULENC	5.41	2.20
25	TINTA BAROCCA	399.59	261.04	76	KERNER	31.43	2.13
26	WEISSER RIESLG	690.26	214.91	77	TINTA FRANCISCA	1.26	1.89
27	FERNÃO PIRES	370.25	165.28	78	CORNIFESTO	1.27	1.54
28	PINOT GRIS	144.47	156.90	79	SCARLOTTA	-	1.52
29	GRENACHE (RED)	43.76	144.03	80	SYLVANER	9.01	1.09
30	ROOBERNET	26.56	140.62	81	SWEET SUNSHINE	-	0.93
31	EMERALD RIESLG	444.90	138.77	82	SUGRATWENTYTHREE	-	0.75
32	GEWÜRZTRAMINER	262.85	122.26	83	SCHÖNBURGER	3.44	0.32
33	THERONA	183.30	103.01	84	BAST CASTELLO	0.04	0.03
34	VILLARD BLANC	0.10	102.48	85	AUXERROIS	11.24	-
35	CHENEL	503.29	100.80	86	BAST MENUDO	0.67	-
36	RAISIN BLANC	881.33	94.73	87	BURGER	0.01	-
37	BUKETTRAUBE	350.29	87.85	88	CINSAUT GRIS	0.04	-
38	TOURIGA NACIONAL	20.88	86.97	89	CSERSZEGI FUSZ	0.04	-
39	CARIGNAN	75.91	79.39	90	FLORA	0.25	-
40	HARSLEVELÜ	495.22	74.56	91	FOLLET	0.25	-
41	UGNI BLANC (TREBBIANO)	227.87	67.78	92	KEUKA	0.02	-
42	SANGIOVESE	6.37	63.45	93	MULLER-THURGAU	2.73	-
43	BARBERA	8.10	48.96	94	OLASZ	0.29	-
44	TANNAT	-	48.79	95	OTHELLO	4.04	-
45	GRENACHE BLANC	27.64	46.21	96	PECS 24	0.01	-
46	SOUZAO	34.83	38.45	97	SAVVATIANO	3.39	-
47	KANAAN	290.36	33.16	98	VITAL	0.27	-
48	ZINFANDEL (PRIMITIVO)	45.84	33.05	99	FURMINT	30.64	-
49	ROUSSANNE	-	28.25	100	HEROLDREBE	0.25	-
50	MORIO MUSCAT	26.41	25.83	101	SCHEUREBE	0.01	-
51	TINTA AMARELLA	0.92	23.33		Total	89,935	101,325

As a percentage of the total SA wine grape vineyard surface, the biggest increase over the past 11 years has occurred in Worcester district. Paarl district on the other hand showed the biggest decrease.

Table 2: Distribution of wine grape vineyards (red & white) per district as a percentage (%) and hectares of the total SA wine grape vineyards surface (1998 and 2008)

District	%	1998 (ha)	%	2008 (ha)
Klein Karoo	4%	3,284	3%	2,957
Orange River	4%	3,949	5%	5,029
Olifants River	9%	8,267	10%	9,995
Robertson	13%	11,754	14%	13,898
Malmesbury	15%	13,176	14%	14,567
Paarl	19%	17,352	17%	16,891
Stellenbosch	17%	15,673	17%	17,137
Worcester	18%	16,481	21%	20,851
Total	100%	89,935	100%	101,325

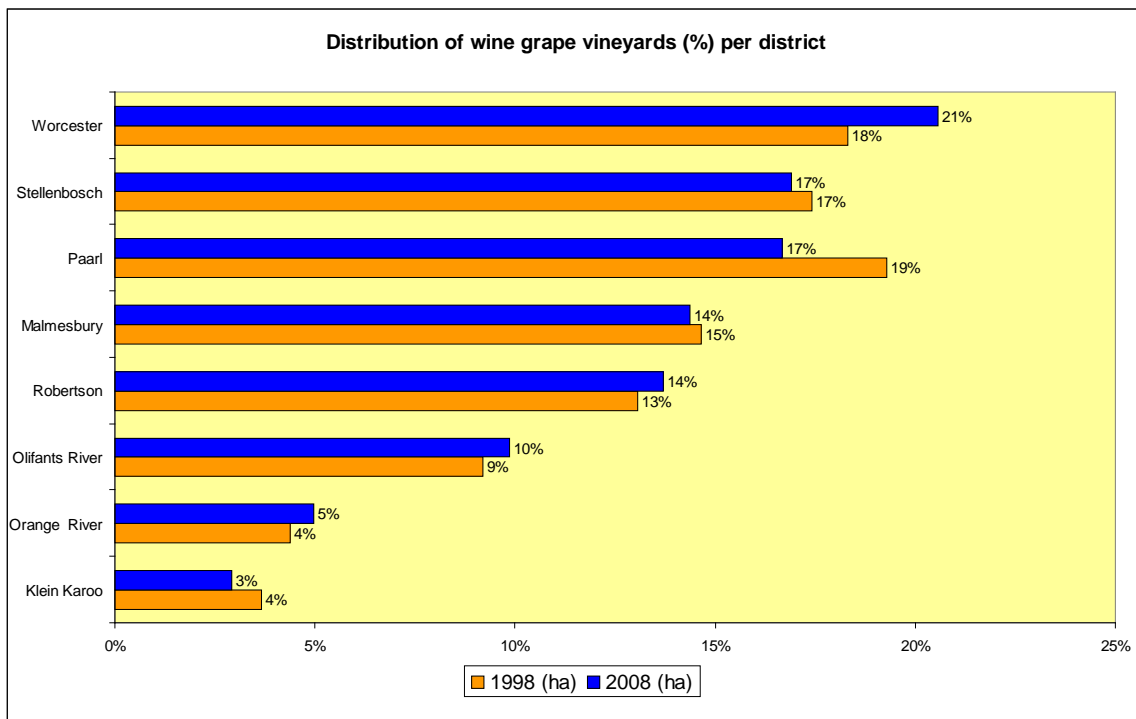


Figure 2: Distribution of wine grape vineyards as a percentage (%) per district

In 2008 wine grape vineyard plantings in Stellenbosch, Paarl and Malmesbury consisted of more than 50% red grape vineyards while the plantings in the other districts consisted of more than 50% white grape vineyards.

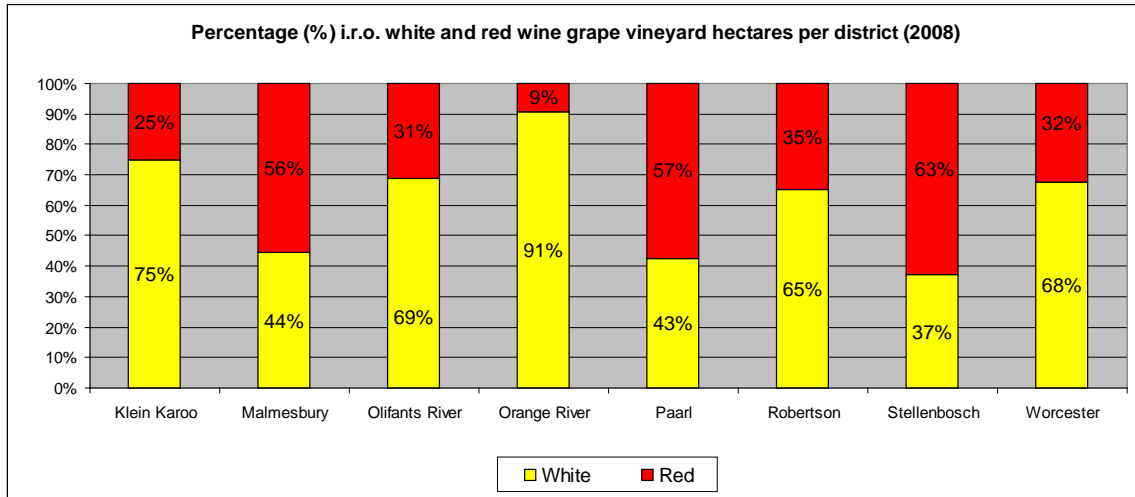


Figure 3: Percentage (%) white and red wine grape vineyard hectares per district (2008)

Although the distribution of wine grape vineyards per district as a percentage (%) of the total SA wine grape vineyard surface (1998 and 2008) did not change significantly over the past 11 years, the composition as far as red and white wine grape vineyards showed significant changes in all districts.

Table 3: Red and white wine grape vineyard distribution per district as a percentage (%) of the surface in each district (1998 and 2008)

DISTRICT	1998		2008	
	Red (ha)	White (ha)	Red (ha)	White (ha)
KLEIN KAROO	11%	89%	25%	75%
MALMESBURY	30%	70%	56%	44%
OLIFANTS RIVER	12%	88%	31%	69%
ORANGE RIVER	4%	96%	9%	91%
PAARL	34%	66%	57%	43%
ROBERTSON	14%	86%	35%	65%
STELLENBOSCH	41%	59%	63%	37%
WORCESTER	16%	84%	32%	68%
TOTAL	25%	75%	44%	56%

3 Changes i.r.o. the most planted white and red wine grape vineyard varieties (excluding Sultana)

The composition of white and red varieties has changed significantly over the past 11 years. In 1998 white and red grape vineyards constituted 75% and 25% respectively of the total surface. A considerable increase in red grape plantings from the late nineties until 2005 caused an increase in the hectares planted to red varieties to 46% of the total surface in 2005. Since 2006 this trend has reversed again and for 2008 the composition consisted of 56% white and 44% red grape vineyards.

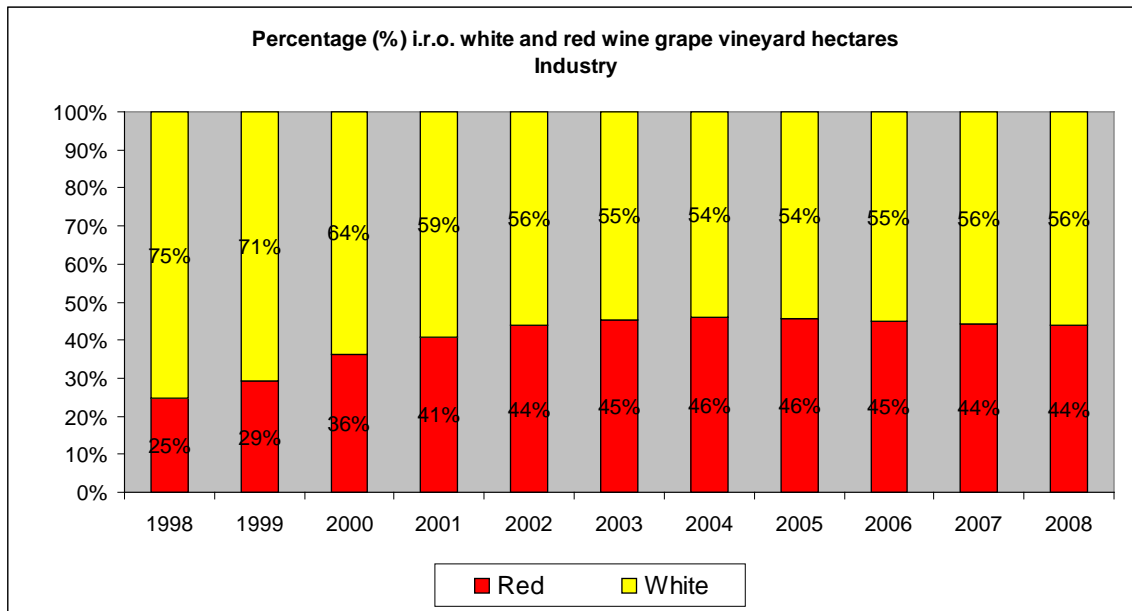


Figure 4: Percentage (%) white and red wine grape vineyard hectares

Except for Paarl and Klein Karoo districts, all the other wine districts showed a net growth in total surface over the past 11 years. The biggest increase has been in Worcester (4,370 hectares), followed by Robertson (2,144 hectares) and Olifants River (1,729 hectares).

Table 4: Net change i.r.o. total surface planted to wine grape vineyards per district (1998 and 2008)

DISTRICT	1998		2008		Change 1998 - 2008		Net change 1998 - 2008 White & Red (ha)
	Red (ha)	White (ha)	Red (ha)	White (ha)	Red (ha)	White (ha)	
KLEIN KAROO	346	2,938	744	2,212	399	-726	-327
MALMESBURY	4,004	9,172	8,105	6,463	4,101	-2,709	1,392
OLIFANTS RIVER	997	7,269	3,119	6,876	2,122	-393	1,729
ORANGE RIVER	175	3,774	469	4,560	294	785	1,080
PAARL	5,827	11,525	9,683	7,207	3,856	-4,318	-461
ROBERTSON	1,701	10,053	4,841	9,057	3,140	-996	2,144
STELLENBOSCH	6,424	9,248	10,786	6,351	4,362	-2,897	1,465
WORCESTER	2,707	13,774	6,752	14,099	4,045	325	4,370
TOTAL	22,181	67,754	44,500	56,825			11,390

In 1998 Chenin blanc vineyards constituted almost 29% of the total wine grape vineyard plantings, Colombar 12,5%, Chardonnay 6,4%, Cabernet Sauvignon 6,2%, followed by the varieties indicated in Table 5. In 1998 Cinsaut, Crouchen (Cape Riesling) and Palomino (French grape) counted among the 10 most planted varieties in the industry. In the course of 11 years the total surface of Chenin blanc decreased by more than 7,000 ha and in 2008 it constituted only 18,6% of the total surface. Cabernet Sauvignon was the second most planted variety in 2008, followed by Colombar and the other varieties indicated in Table 5. Cinsaut, Crouchen and Palomino no longer form part of the 10 most planted varieties and had to make way for Shiraz, Merlot and Ruby Cabernet. Shiraz, followed by Cabernet Sauvignon, Sauvignon blanc, Merlot and Chardonnay, were the five most planted varieties over the past 11 years.

Table 5: Surface i.r.o. most planted varieties in the industry (1998 and 2008)

Surface i.r.o. most planted varieties - 1998 and 2008 (Industry)						
1998			2008			Change since 1998 (Ha)
Variety	Hectares	% of total	Hectares	% of total		
Chenin blanc	25,875	28.8%	18,852	18.6%	-7,023	
Cabernet Sauvignon	5,615	6.2%	12,697	12.5%	7,083	
Colombar	11,244	12.5%	11,877	11.7%	633	
Shiraz	1,999	2.2%	9,907	9.8%	7,908	
Sauvignon blanc	4,966	5.5%	9,155	9.0%	4,190	
Chardonnay	5,722	6.4%	8,255	8.1%	2,534	
Merlot	2,625	2.9%	6,614	6.5%	3,989	
Pinotage	4,750	5.3%	6,088	6.0%	1,338	
Ruby Cabernet	1,208	1.3%	2,381	2.3%	1,173	
Muscat d'Alexandrie (White Hanepoot)	4,918	5.5%	2,346	2.3%	-2,572	
Cinsaut	3,955	4.4%	2,241	2.2%	-1,714	
Crouchen (Cape Riesling)	3,139	3.5%	895	0.9%	-2,244	
Palomino (French grape)	3,134	3.5%	381	0.4%	-2,752	
Other	10,786	12.0%	9,635	9.5%	-1,152	
Total	89,935	100%	101,325	100%	11,390	

Except for Cinsaut the other most planted red varieties in the industry have increased in hectares over the past 11 years. This growing trend has reversed over the past 3 to 5 years with decreases or decelerations being the order of the day.

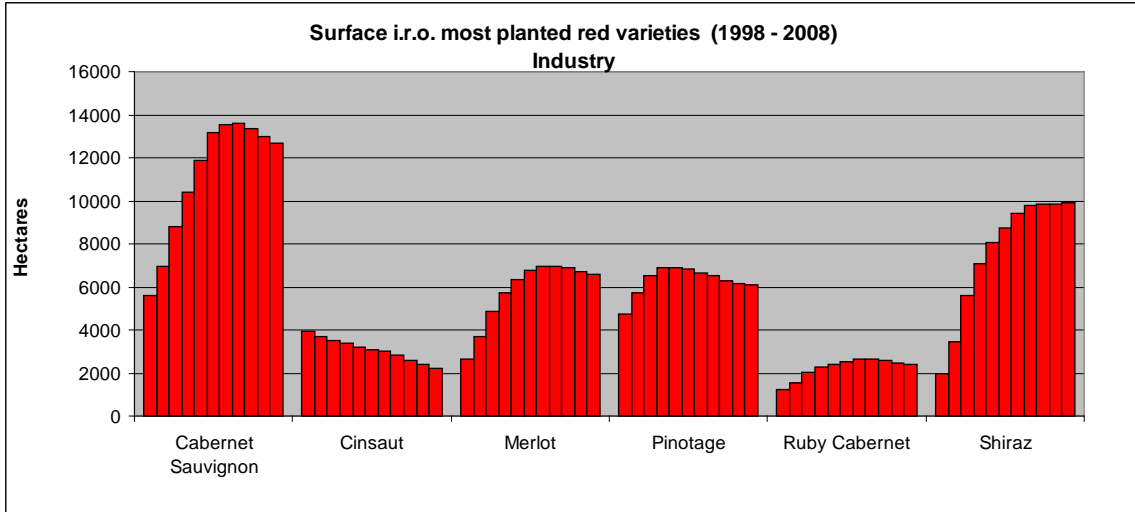


Figure 5: Surface i.r.o. the most planted red varieties in the industry (1998 - 2008)

Chardonnay, Colombar and Sauvignon blanc are the only most planted white varieties that have shown positive growth in surface over the past 11 years. Crouchen (Cape Riesling), Chenin blanc, Palomino (French grape) and Muscat d’Alexandrie (White Hanepoot) have decreased in surface. Over the past three years both these trends seem to have decelerated.

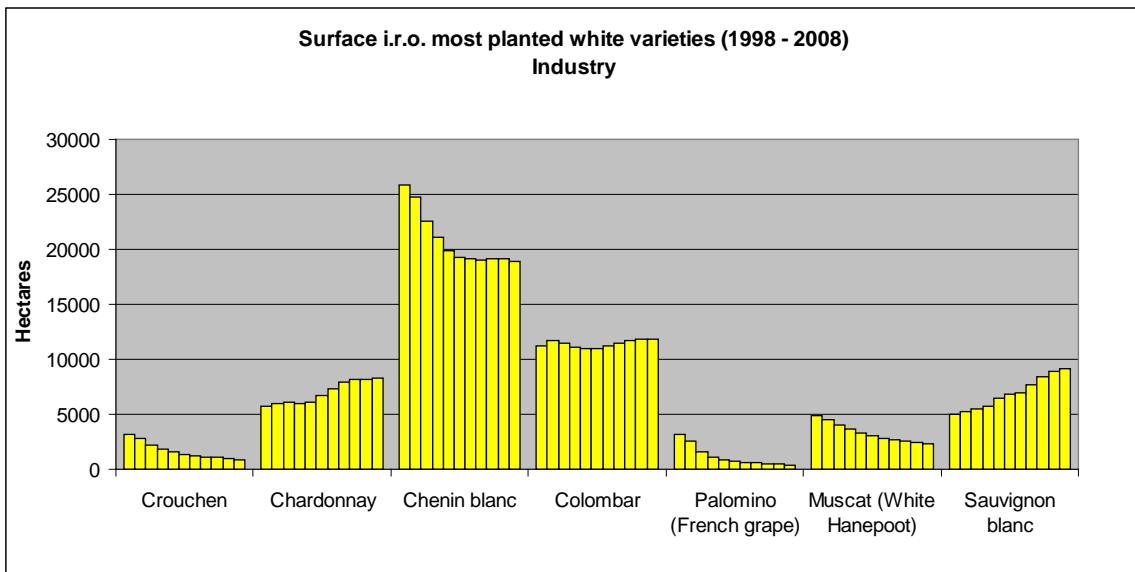


Figure 6: Surface i.r.o. most planted white varieties in the industry (1998 - 2008)

4 Plantings and uprootings of wine grape vineyards (excluding Sultana)

Over the past 5 years uprootings have maintained a fairly stable level. Plantings on the other hand have decreased by more than 60% over the past 5 years. It is obvious that more grapevines were uprooted than planted in 2006, 2007 and 2008. Total vineyard plantings are decreasing and a further cause of concern is that since 2005 the industry has not been able to replace 5% of existing vineyards (20 years serve as a guideline for economic lifespan).

No district has been able to replace 5% of their total wine grape vineyards over the past two years.

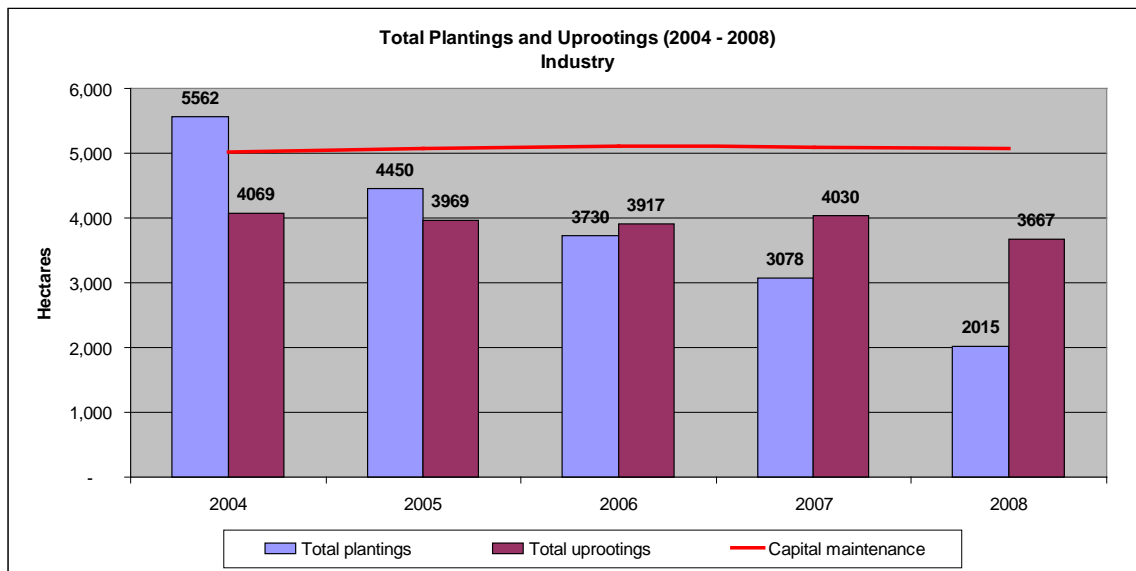


Figure 7: Plantings and uprootings i.r.o. red and white wine grape vineyards in the industry (2004 - 2008)

From 1998 to 2003 the industry's total annual plantings have comprised more than 50% red wine grape vineyards. Since then the trend has switched to more than 50% white plantings. In 2008 there seemed to be a slow revival i.r.o. the low percentage (%) red plantings.

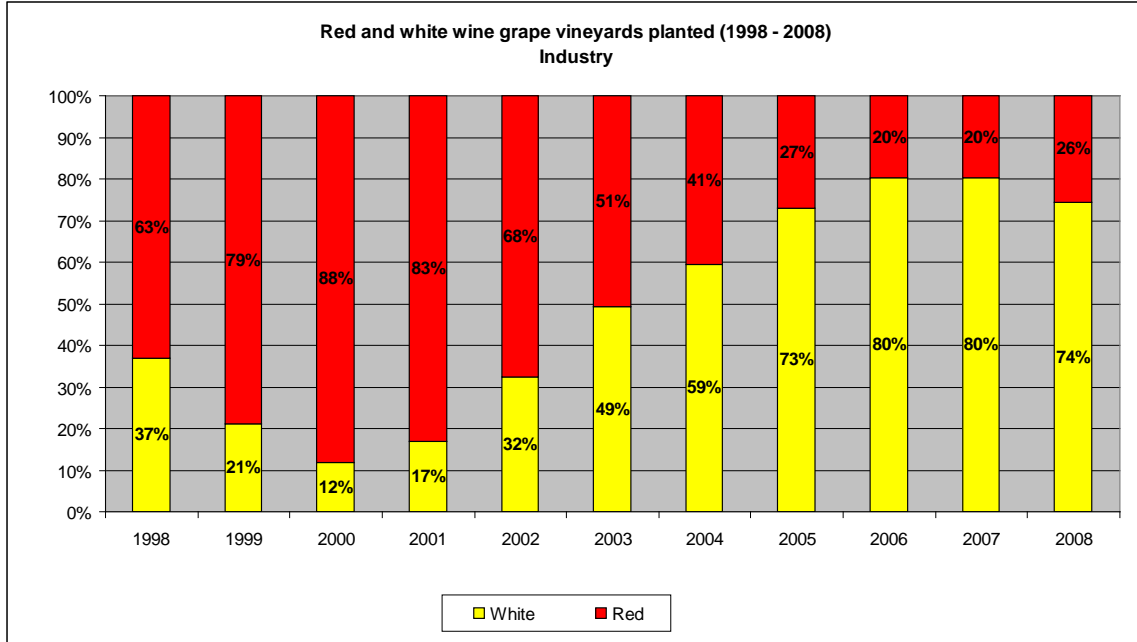


Figure 8: Red and white wine grape vineyards planted (1998 - 2008)

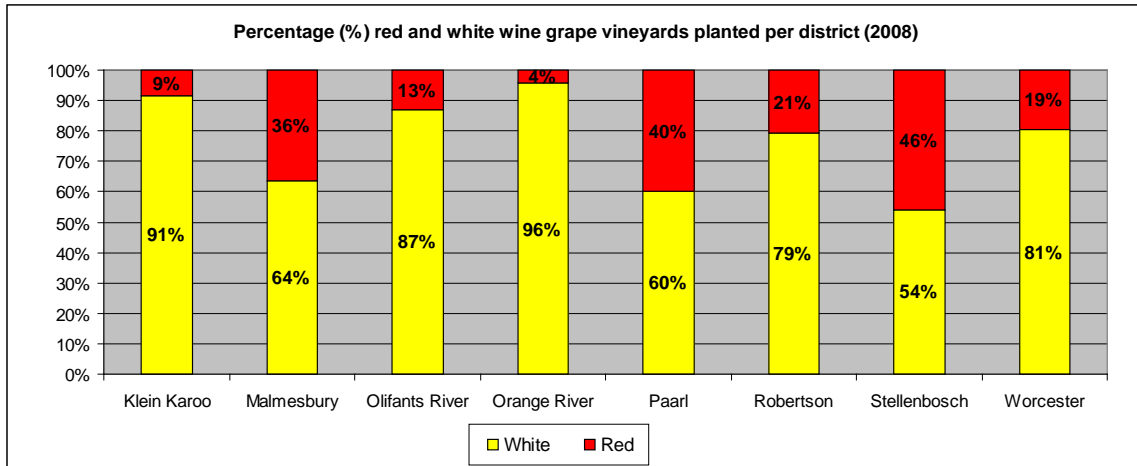


Figure 9: Percentage (%) red and white wine grape vineyards planted per district (2008)

Over the past five years only Robertson and Worcester districts have experienced an annual net growth in total wine grape vineyard hectares. All other districts showed a negative growth for at least three out of the last five years.

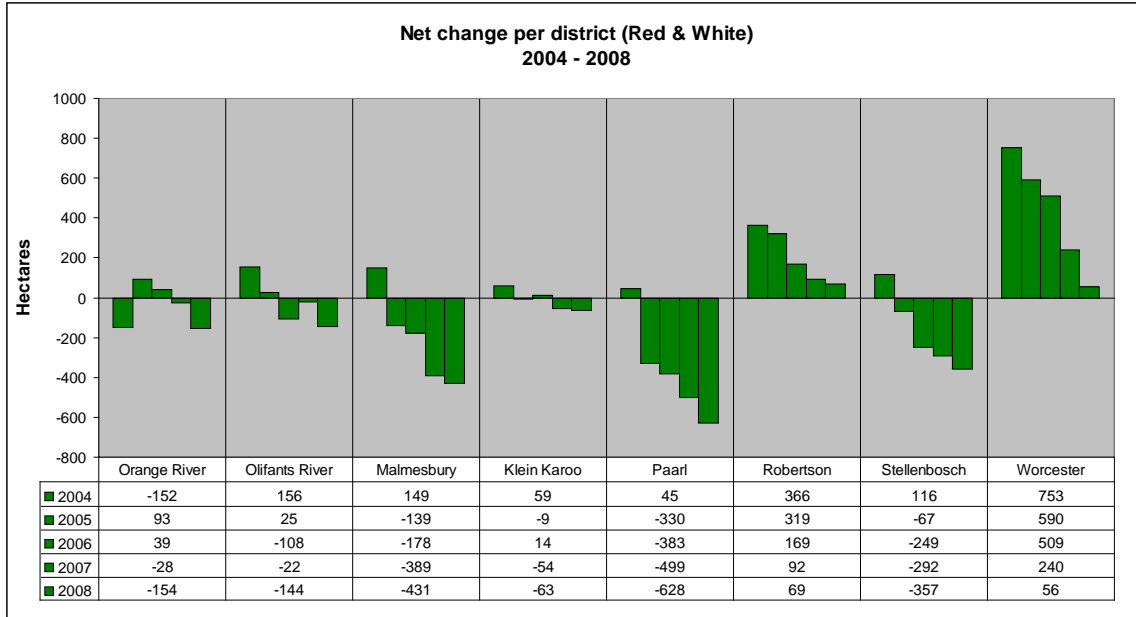


Figure 10: Net change i.r.o. red and white wine grape vineyard hectares per district (2004 - 2008)

Over the past five years only Robertson and Worcester districts have experienced an annual net growth in white wine grape vineyard hectares.

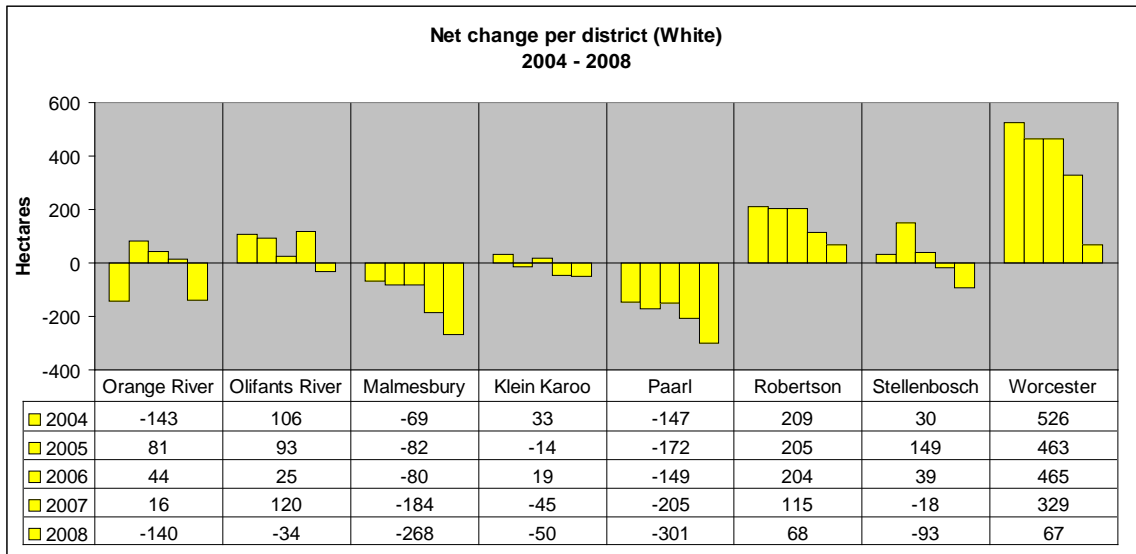


Figure 11: Net change i.r.o. white wine grape vineyard hectares per district (2004 - 2008)

Over the past 2 years no district has experienced any net growth i.r.o. red wine grape vineyard hectares.

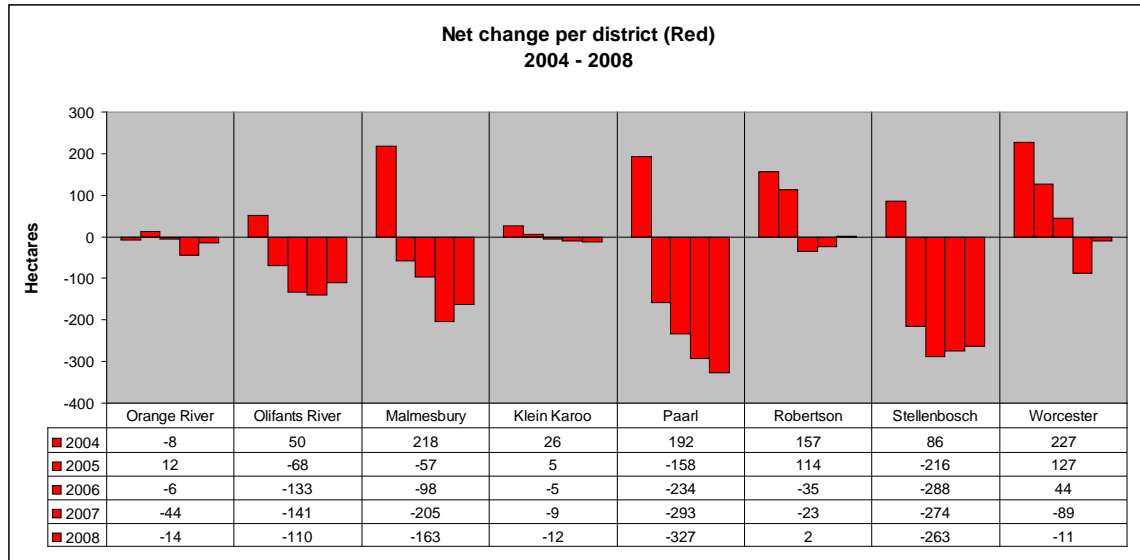


Figure 12: Net change i.r.o. red wine grape vineyard hectares per district (2004 - 2008)

5 Age distribution of wine grape vineyards (excluding Sultana)

If 20 years is considered a realistic and acceptable guideline i.r.o. the economic lifespan of wine grape vineyards, it follows that 5% of all existing vineyards must be replaced annually. Furthermore the age distribution should consist of at least 20% vineyards aged 4 years and younger and not more than 15% older than 20 years. Consequently it may be said that the joint age distribution of white and red wine grape vineyards in the industry is not at ideal levels.

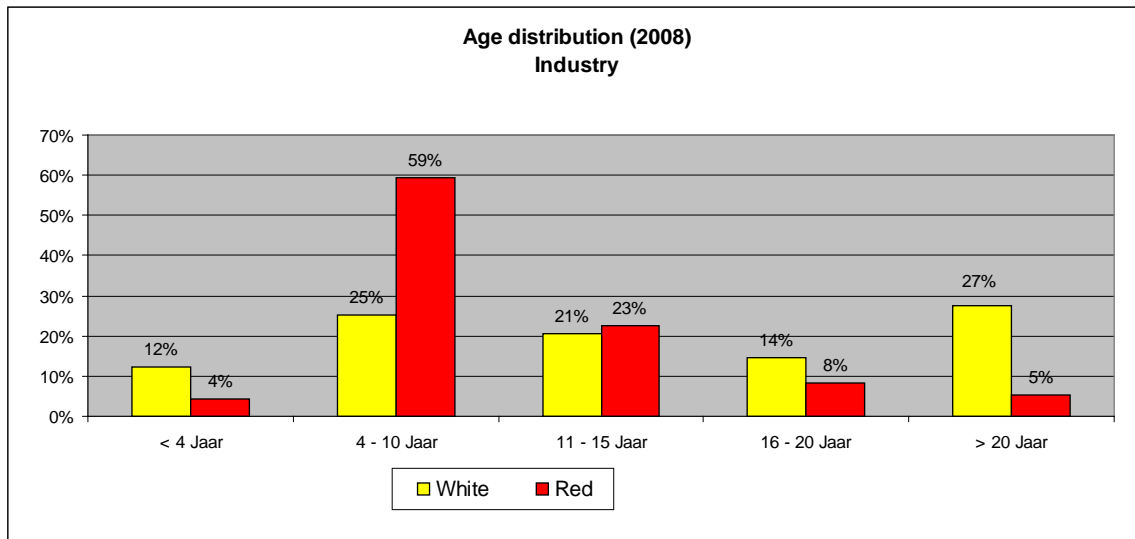


Figure 13: Age distribution of white and red wine grape vineyards (2008)

Approximately 27% of the industry's total white wine grape vineyard hectares were older than 20 years in 2008. On the other hand only 12% fell in the age group 4 years and younger.

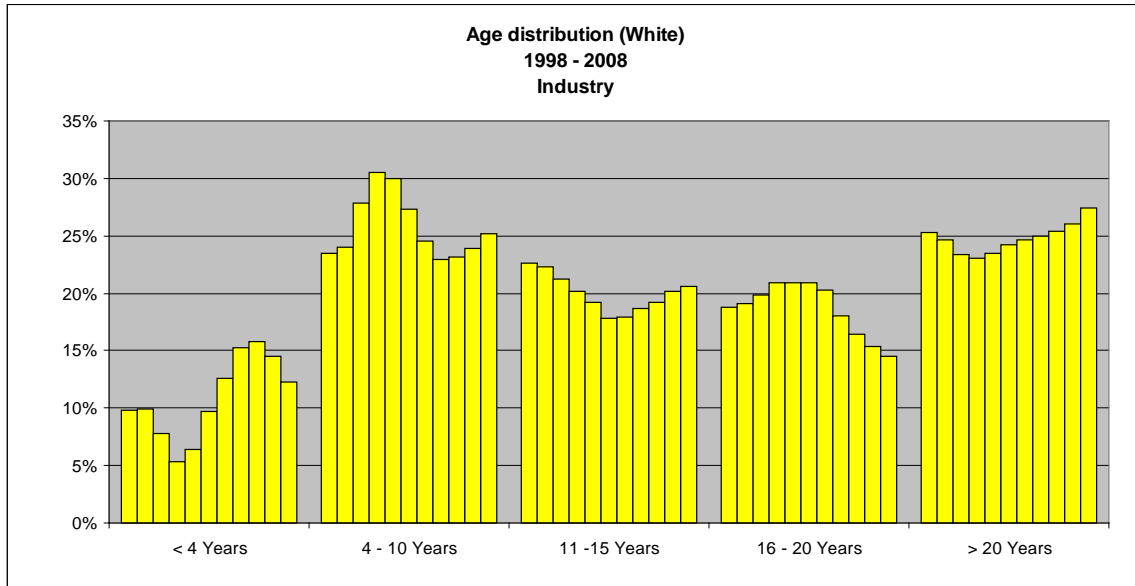


Figure 14: Age distribution i.r.o. all white wine grape vineyards in the industry (1998 - 2008)

Almost 60% of the industry's total red wine grape vineyard hectares were between 4 and 10 years old in 2008. Only 4% were 4 years and younger. In 1998 25% were older than 20 years compared to only 5% in 2008. The latter swing can certainly be ascribed to the fact that old and non-profitable red wine vineyards were uprooted and not replaced with red.

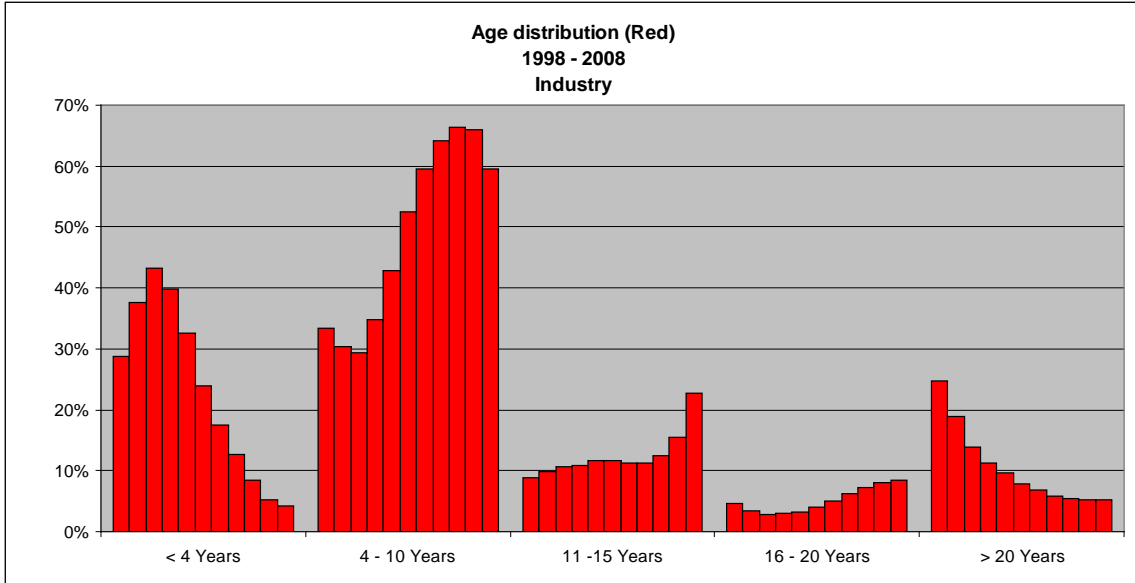


Figure 15: Age distribution i.r.o. all red wine grape vineyards in the industry (1998 - 2008)

Figures 16 to 28 illustrate the age distribution i.r.o. the top varieties (1998 and 2008) over the past 11 years.

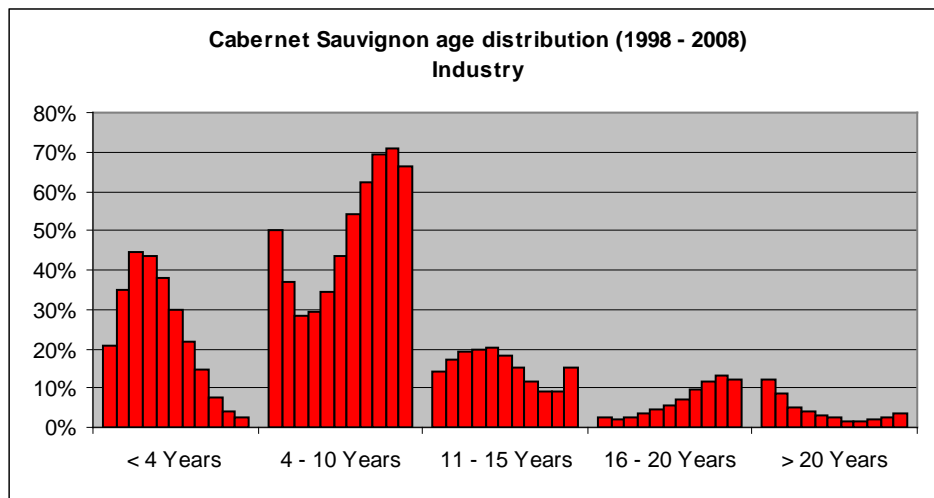


Figure 16: Age distribution Cabernet Sauvignon (1998 - 2008)

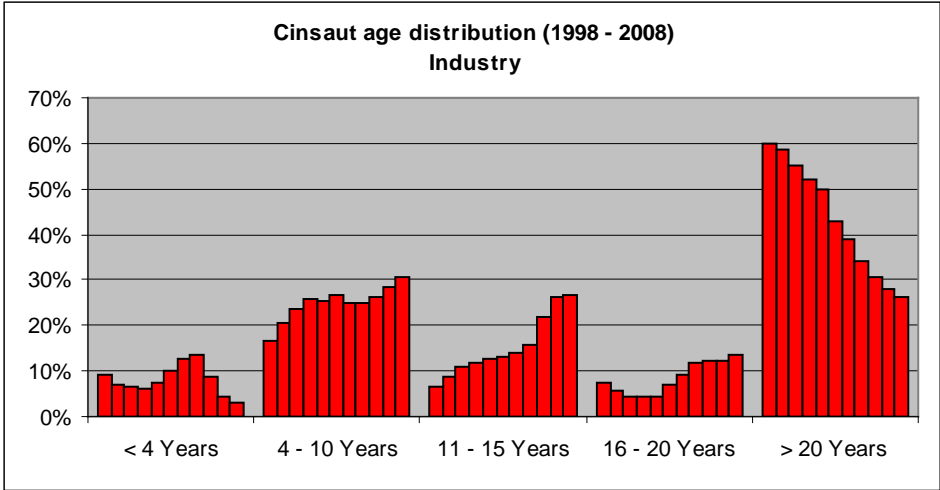


Figure 17: Age distribution Cinsaut (1998 - 2008)

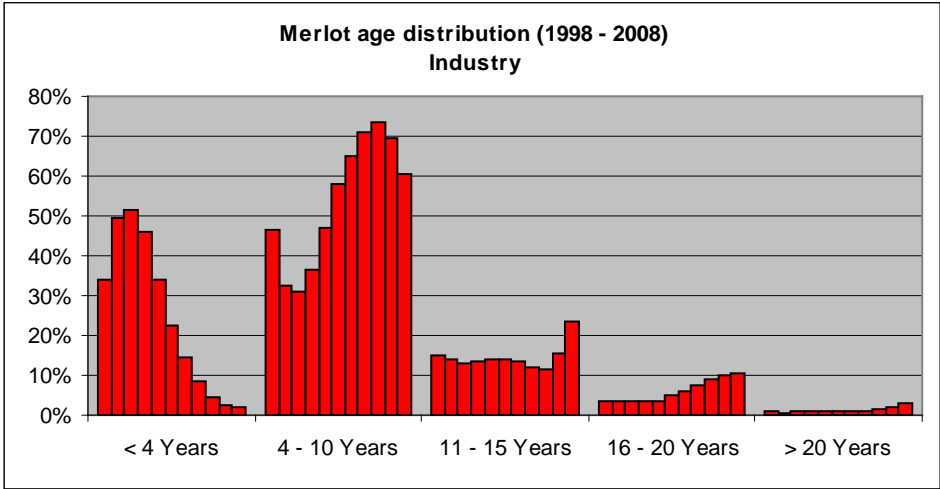


Figure 18: Age distribution Merlot (1998 - 2008)

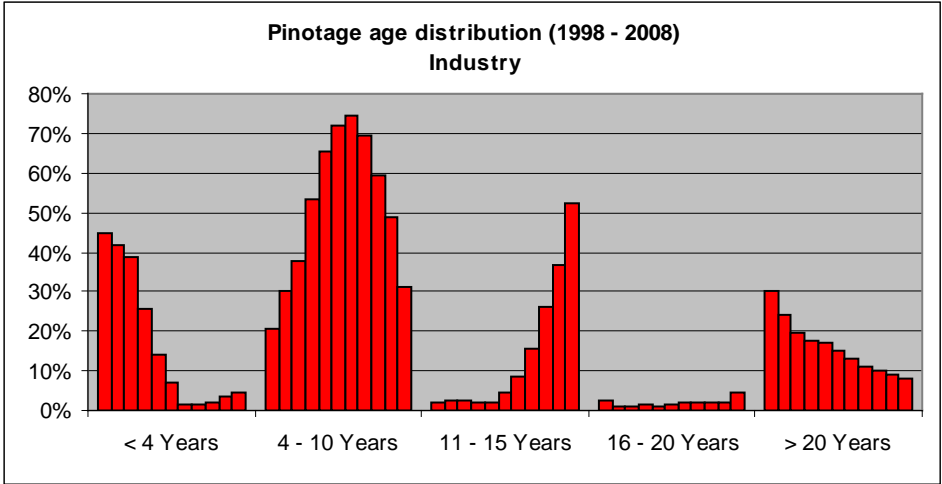


Figure 19: Age distribution Pinotage (1998 - 2008)

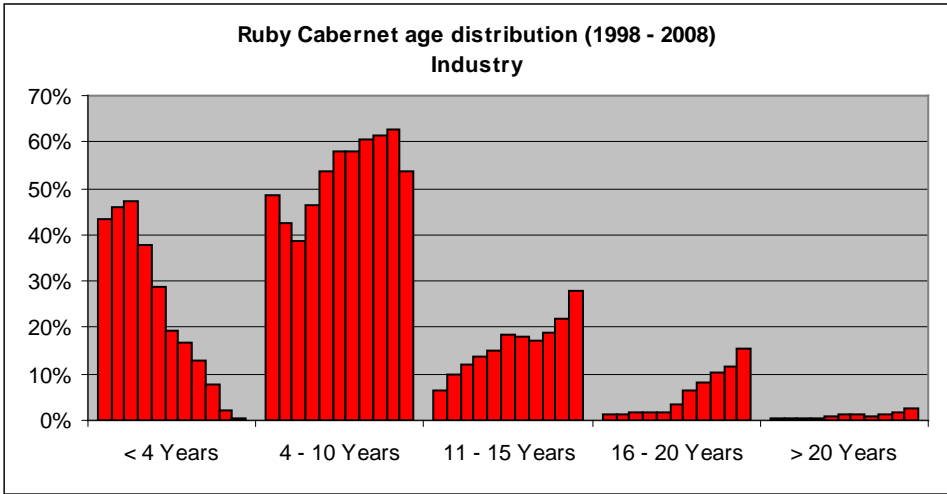


Figure 20: Age distribution Ruby Cabernet (1998 - 2008)

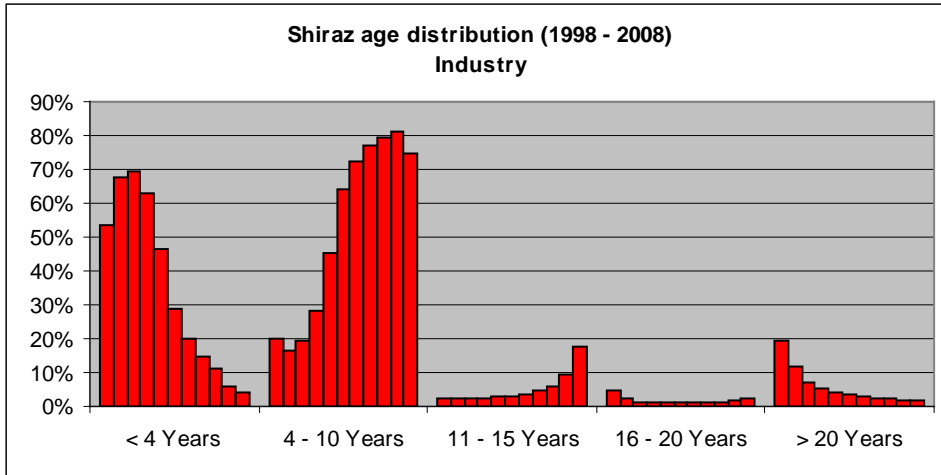


Figure 21: Age distribution Shiraz (1998 - 2008)

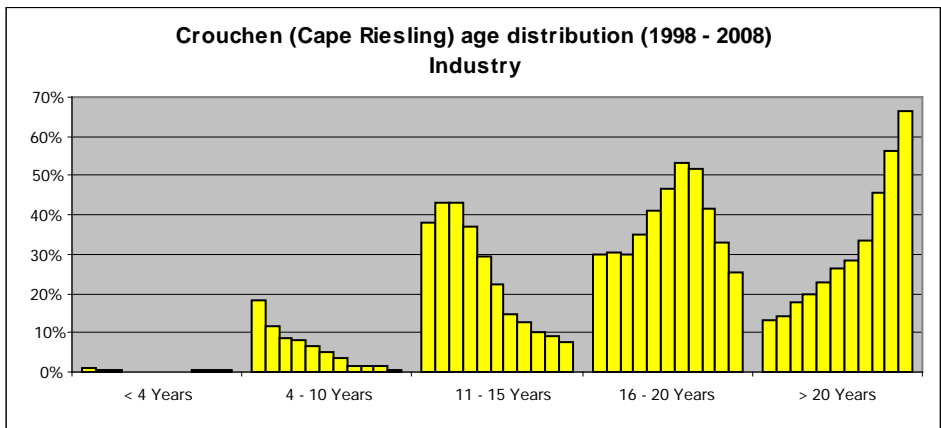


Figure 22: Age distribution Crouchen (Cape Riesling) (1998 - 2008)

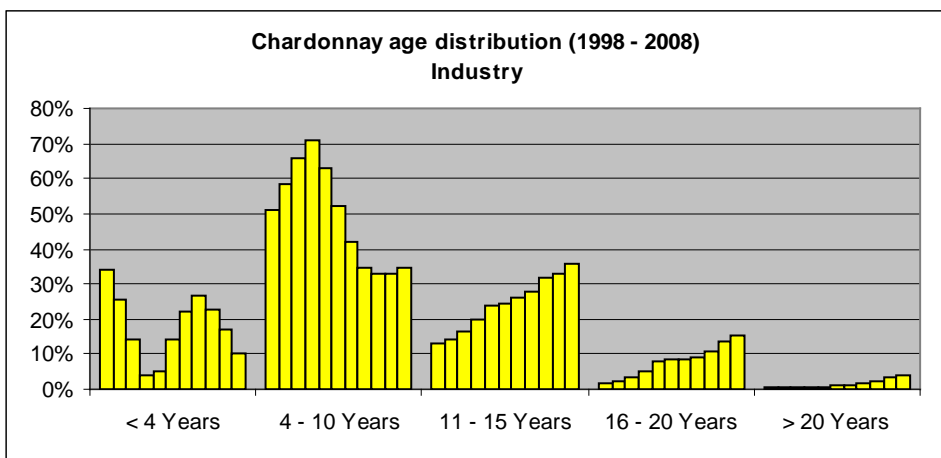


Figure 23: Age distribution Chardonnay (1998 - 2008)

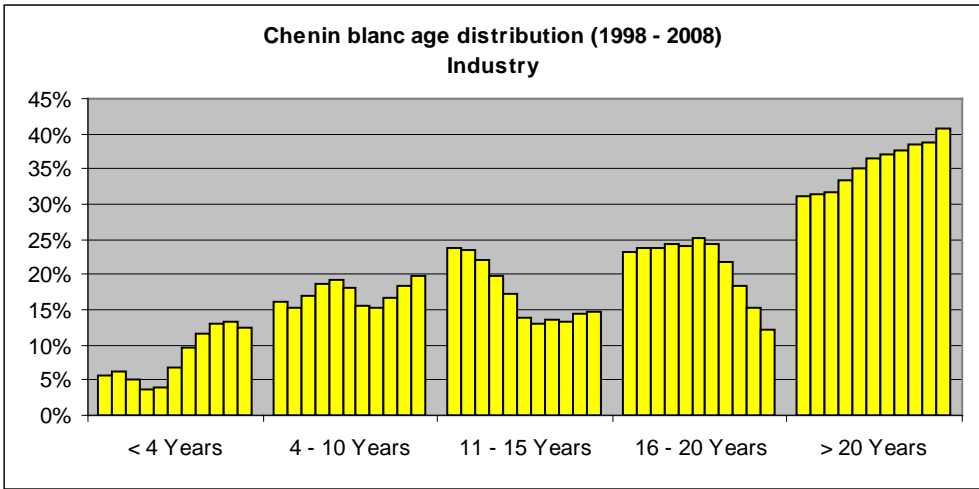


Figure 24: Age distribution Chenin blanc (1998 - 2008)

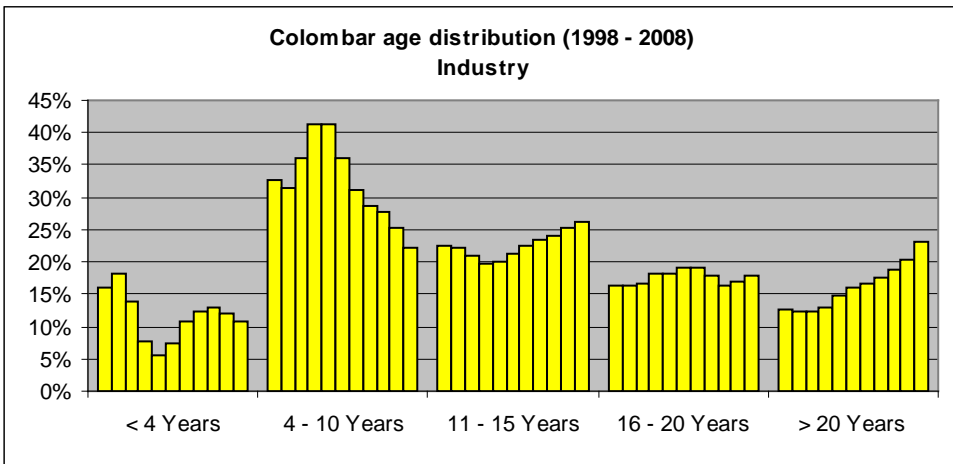


Figure 25: Age distribution Colombar (1998 - 2008)

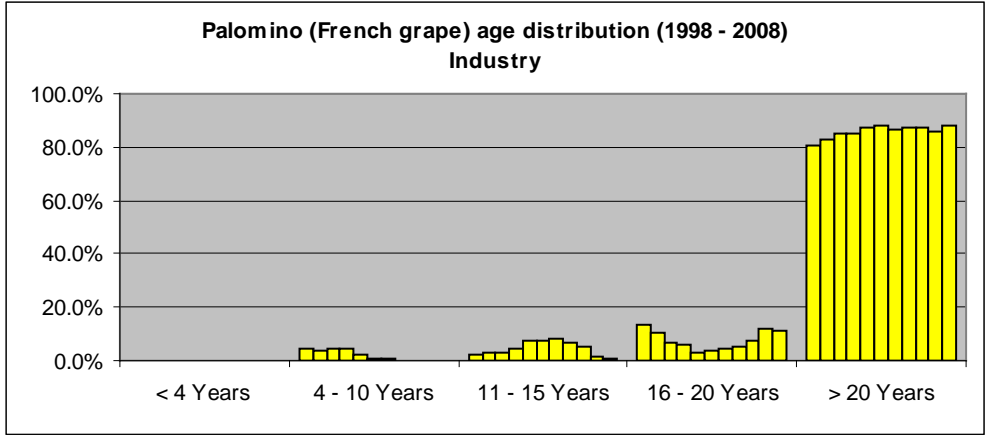


Figure 26: Age distribution Palomino (French grape) (1998 - 2008)

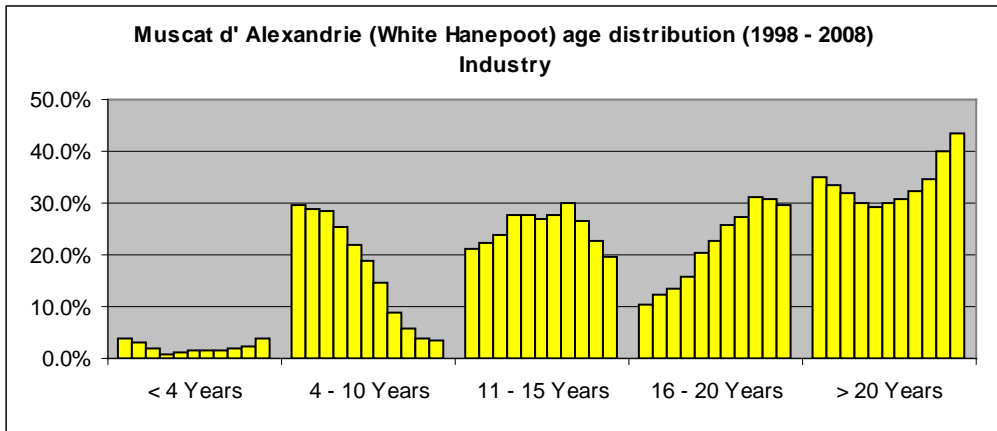


Figure 27: Age distribution Muscat d'Alexandrie (White Hanepoot) (1998 - 2008)

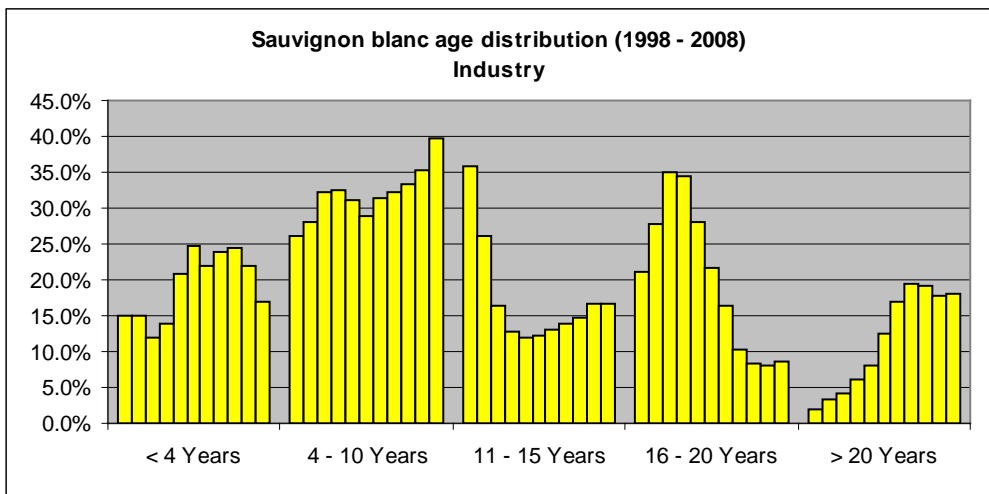


Figure 28: Age distribution Sauvignon blanc (1998 - 2008)

6 Rootstock varieties 1998 - 2008 (excluding Sultana)

Approximately 90% of the total 2008 wine grape surface consists of vines grafted on Richter 99 (43%), 101/14 (19%), Richter 110 (18%) and Ramsey (10%). As a percentage of the total annual surface and in hectares Makstok showed the biggest decrease since 1998, followed by Jacques. The biggest percentage increases were Richter 110 and Ramsey respectively. Among the less planted varieties Usvit 8-7, Ruggeri 140 and Paulsen 1103 also showed good increases. Percentage-wise Richter 99 slowed down, although in hectares it increased - thus remaining the most planted rootstock in the industry.

Table 6: Plantings and changes i.r.o. rootstock varieties in the industry

ROOTSTOCK	INDUSTRY			
	1998 (ha)	%	2008 (ha)	%
RICHTER 99	38,259	43%	43,481	43%
101/14	19,117	21%	19,625	19%
RICHTER 110	7,767	9%	17,772	18%
RAMSEY	6,047	7%	9,660	10%
MAKSTOK	10,345	12%	3,660	4%
USVIT 8-7	154	< 1%	2,055	2%
RUGGERI 140	324	< 1%	1,188	1%
PAULSEN 1103	131	< 1%	1,187	1%
R/STOCK VARIOUS	1,076	1%	980	1%
JACQUEZ	5,724	6%	916	1%
143 B	491	1%	368	< 1%
SO4	35	< 1%	240	< 1%
METALLICA	273	< 1%	99	< 1%
USVIT 2-1	105	< 1%	51	< 1%
1202 X R99	27	< 1%	19	< 1%
OTHER	60	< 1%	25	< 1%
TOTAL	89,935		101,324	

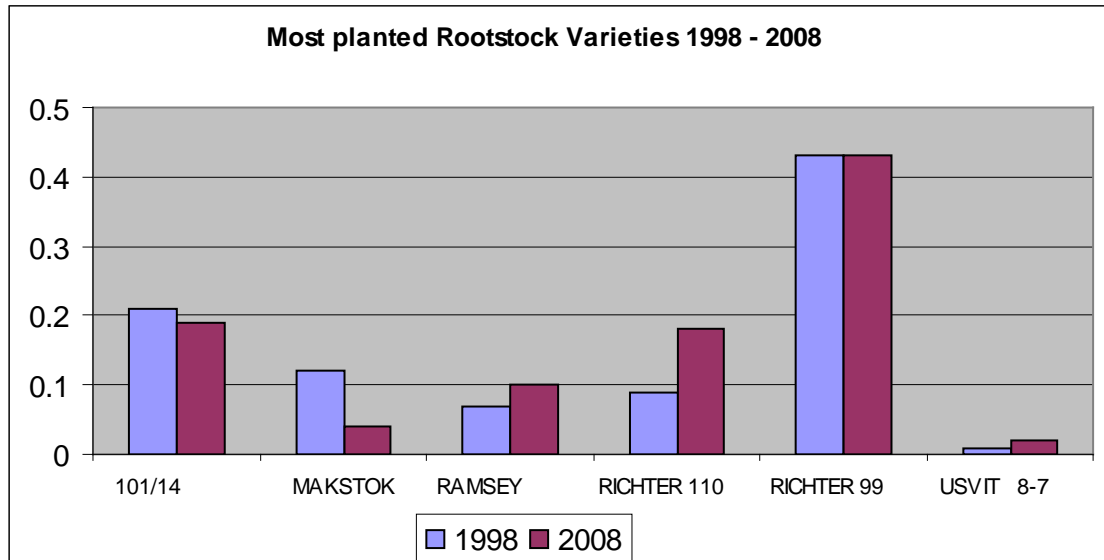


Figure 29: Changes i.r.o. most planted rootstock varieties since 1998

Table 7: Plantings and changes of rootstock varieties in the industry per district

ROOTSTOCK	ORANGE RIVER		OLIFANTS RIVER		MALMESBURY		KLEIN KAROO		PAARL		ROBERTSON		STELLENBOSCH		WORCESTER	
	1998 (ha)	2008 (ha)	1998 (ha)	2008 (ha)	1998 (ha)	2008 (ha)	1998 (ha)	2008 (ha)	1998 (ha)	2008 (ha)	1998 (ha)	2008 (ha)	1998 (ha)	2008 (ha)	1998 (ha)	2008 (ha)
RICHTER 99	1,932	2,667	4,421	5,918	8,575	10,524	1,103	961	6,223	7,103	2,730	2,047	7,471	6,147	5,804	8,115
101/14	91	166	639	858	1,006	457	817	685	4,624	4,514	5,708	4,317	3,239	5,168	2,992	3,461
RICHTER 110	292	911	211	556	753	2,086	219	486	1,489	2,440	1,373	4,275	1,932	4,188	1,498	2,830
RAMSEY	56	325	801	1,683	461	485	157	371	1,310	1,108	680	1,588	366	351	2,217	3,748
MAKSTOK	1,528	749	2,133	707	1,654	479	707	291	2,079	653	348	252	1,590	400	305	130
USVIT 8-7	1	20	7	120		84		35	8	238	4	482	6	55	128	1,022
RUGGERI 140	5	19	10	27	9	240	1	11	84	106	15	64	114	314	86	407
PAULSEN 1103	2	23	9	80	10	78	1	27	30	255	21	124	18	162	41	438
R/STOCK VARIOUS	2		1	12	114	57	35	12	150	158	337	457	227	120	210	165
JACQUEZ	6	4	22	14	557	48	188	38	1,052	195	272	44	485	82	3,140	490
143 B	35	140	7	2	5	11	21	19	145	22	203	141	56	20	19	13
SO4		3		9	2	10		1	15	39	9	95	9	56	1	25
METALLICA			1		23	5	2		106	44	45	12	74	36	22	2
USVIT 2-1			2	2					18	10	2		79	35	5	4
1202 X R99							26	19	1							-
OTHER	0.1	0.4	1	9	6	3	7	1	18	5	8	0.2	7	4	14	3
TOTAL	3,949	5,029	8,267	9,995	13,176	14,567	3,284	2,957	17,352	16,891	11,754	13,898	15,673	17,137	16,481	20,851

7 Most important trends i.r.o. Sultana plantings

Nota bene: Only some Sultana grapes are used for winemaking purposes.

The total hectares planted to Sultana vineyards have decreased by more than 20% (2,433 ha) since 2001. More than 90% (2008) of the Sultanas occur in the Orange River district.

Table 8: Distribution of Sultana vineyards per district (1998 - 2008)

District	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
Klein Karoo	49	46	48	46	44	43	43	42	33	33	32
Malmesbury	204	247	246	229	302	244	242	228	226	211	212
Olifants River	363	336	335	306	267	281	263	241	212	212	190
Orange River	10,022	10,538	10,883	10,899	10,684	10,559	10,404	10,052	9,685	9,088	8,685
Paarl	139	137	153	146	159	148	140	134	127	138	104
Robertson	84	86	64	65	55	66	55	37	41	41	34
Stellenbosch	1	1	0	0	0	0	0	0	0	0	0
Worcester	182	187	182	226	255	255	246	249	247	236	228
Total	11,044	11,578	11,910	11,919	11,765	11,595	11,392	10,983	10,571	9,958	9,486

More than 46% of the hectares planted to Sultana vines were older than 20 years in 2008. Only 2% were in the age group younger than 4 years.

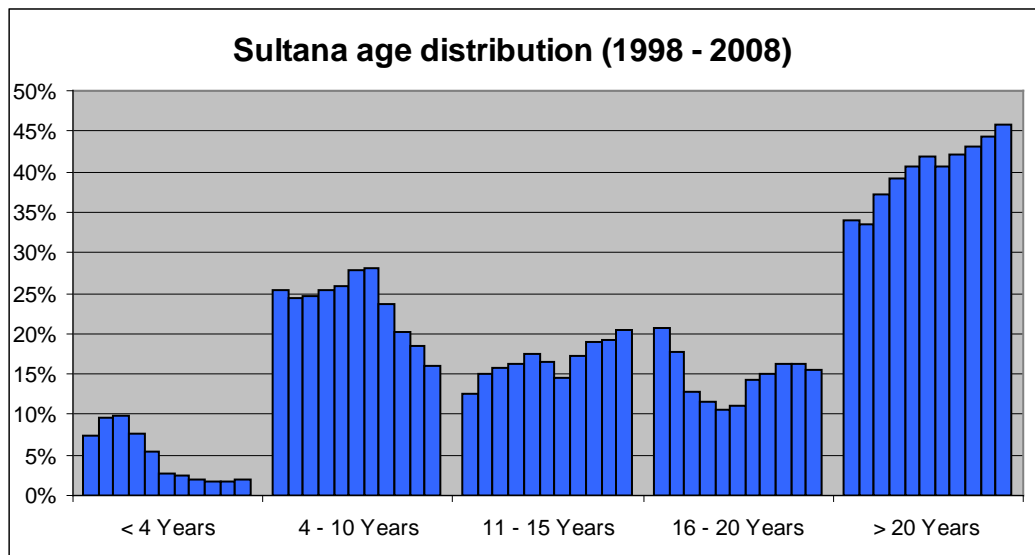


Figure 30: Age distribution of Sultana vineyards (1998 - 2008)

8 Irrigation types in the SA wine industry (excluding Sultana)

Approximately 53% of the total wine grape vineyard plantings currently receive drip irrigation, compared to less than 23% in 1996. In the course of 13 years until 2008 more than 34,000 ha of drip irrigation were installed in the industry. The surface under micro-irrigation has also increased by 4,134 ha since 1996, but this increasing trend appears to have been reversed over the past 2 years. Dryland vineyards, vineyards under flood irrigation and vineyards under sprinkler irrigation have decreased by 6,201 ha, 2,358 ha and 13,749 ha respectively since 1996.

Table 9: Composition (%) per irrigation type for the wine industry

Type of Irrigation	1996		2005		2006		2007		2008	
	ha	%	ha	%	ha	%	ha	%	ha	%
OTHER	267	0.3	264	0.3	251	0.2	248	0.2	239	0.2
DRIP	19,349	22.7	48,164	47.4	50,391	49.3	51,928	50.9	53,700	53.0
NONE	23,475	27.6	19,856	19.5	19,055	18.7	18,388	18.0	17,274	17.0
MICRO	10,739	12.6	15,078	14.8	15,169	14.9	15,066	14.8	14,873	14.7
SPRINKLER	22,506	26.4	11,444	11.3	10,401	10.2	9,554	9.4	8,757	8.6
FLOOD	8,839	10.4	6,800	6.7	6,879	6.7	6,773	6.6	6,481	6.4
TOTAL	85,176		101,607		102,146		101,957		101,325	

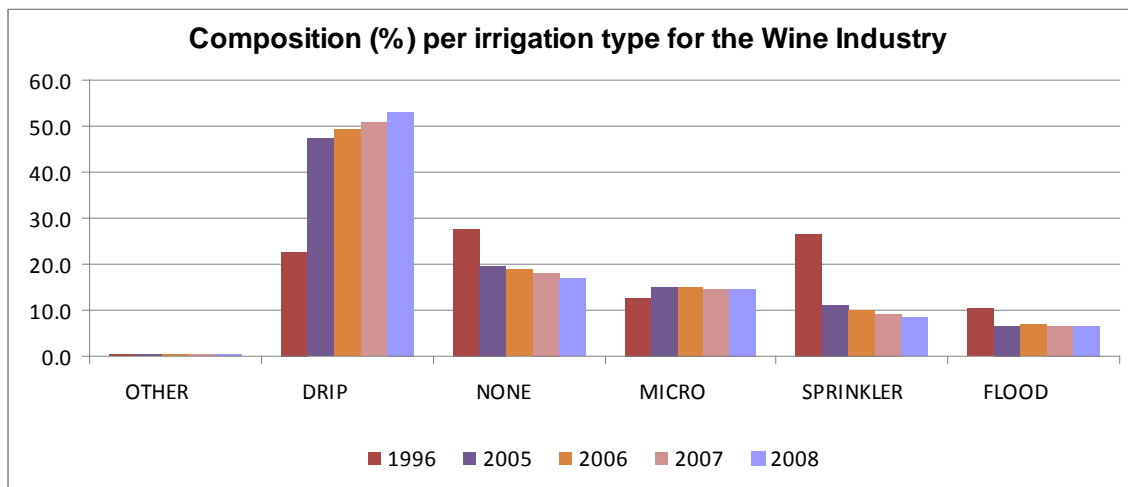


Figure 31: Irrigation types in the wine industry

Figures 32 to 39 illustrate the composition i.r.o. the irrigation type for each district (1996 - 2008).

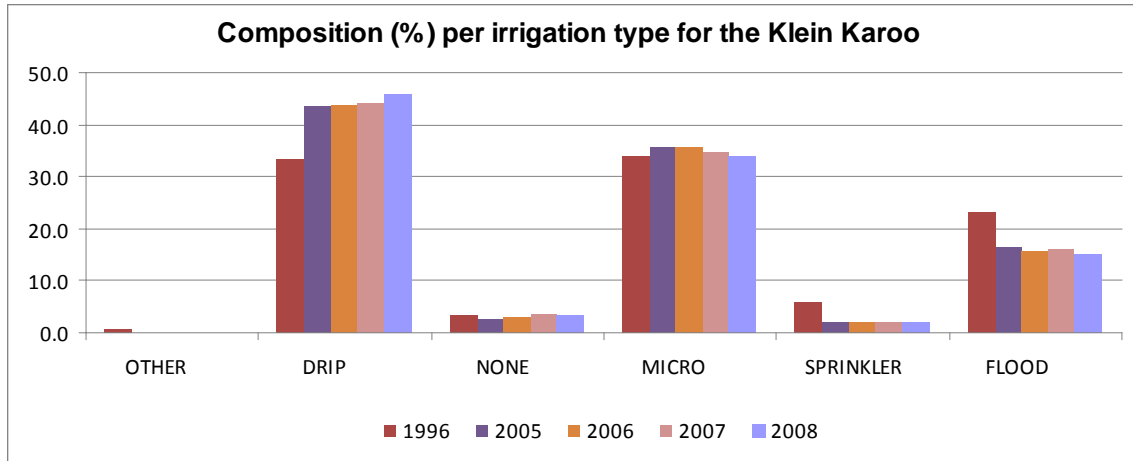


Figure 32: Irrigation types Klein Karoo

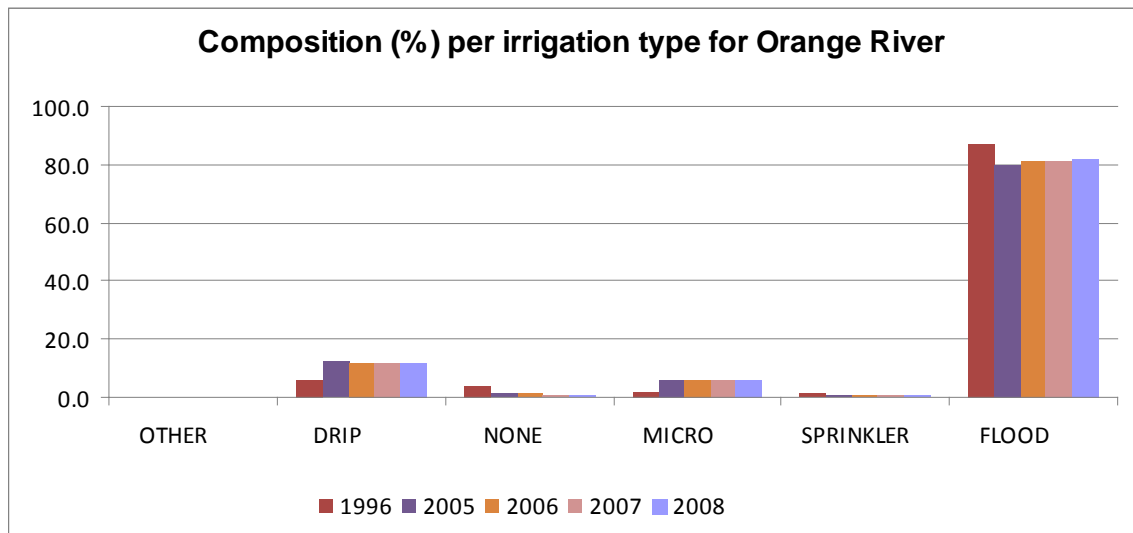


Figure 33: Irrigation types Orange River

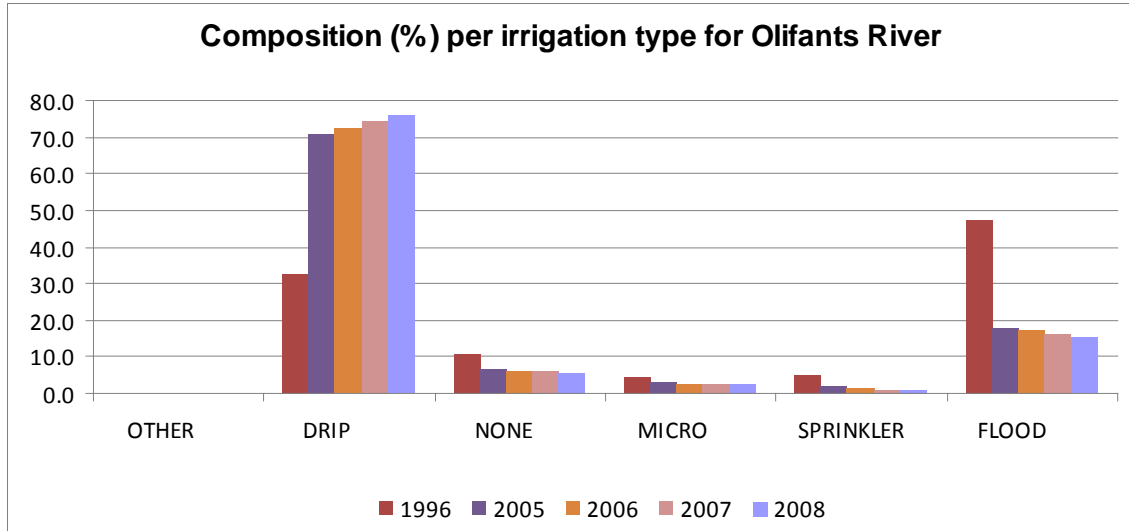


Figure 34: Irrigation types Olifants River

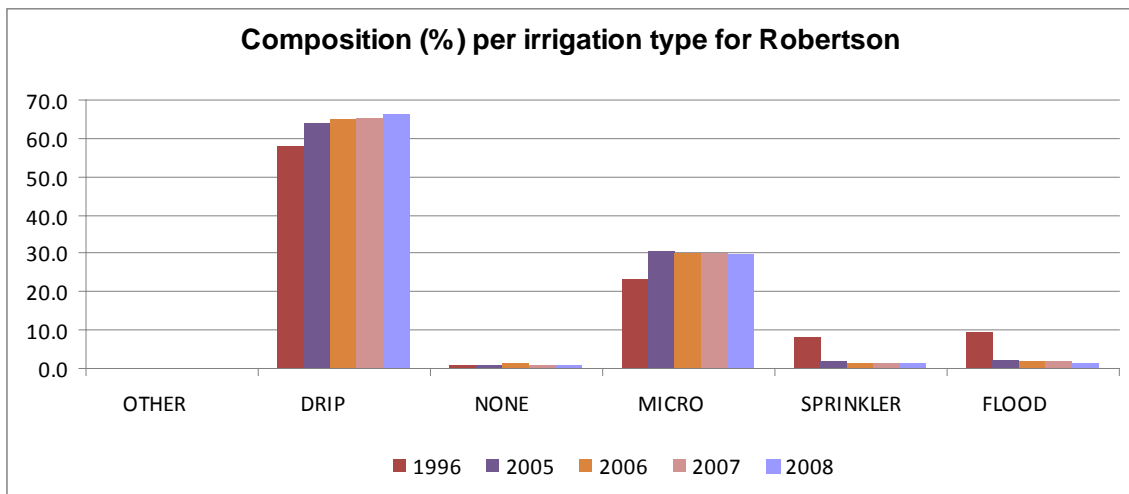


Figure 35: Irrigation types Robertson

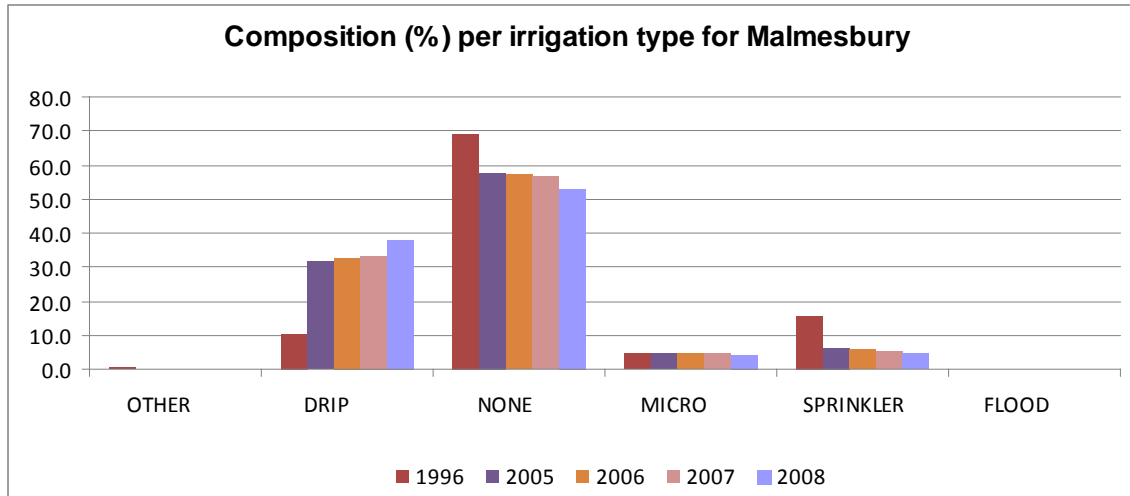


Figure 36: Irrigation types Malmesbury

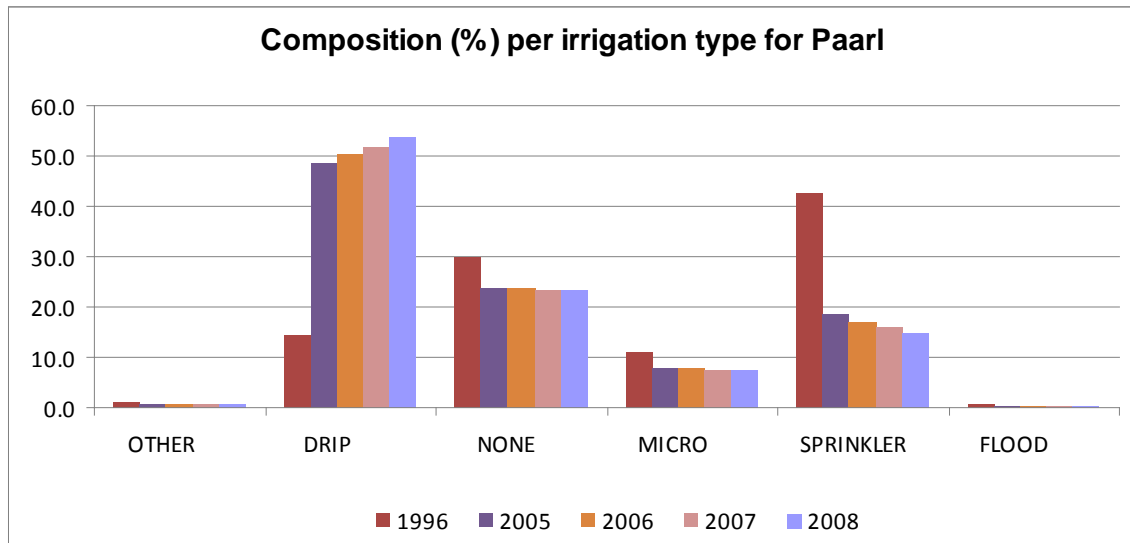


Figure 37: Irrigation types Paarl

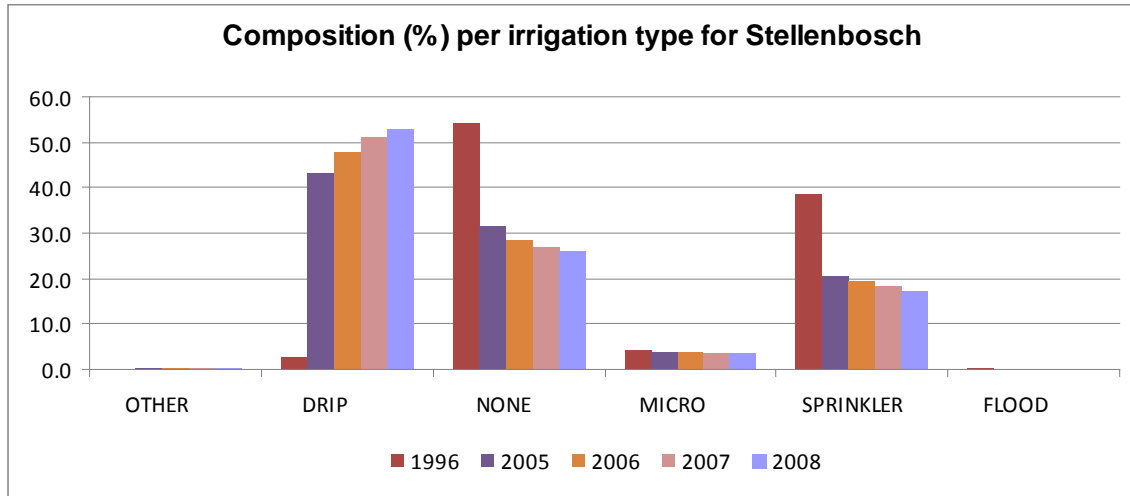


Figure 38: Irrigation types Stellenbosch

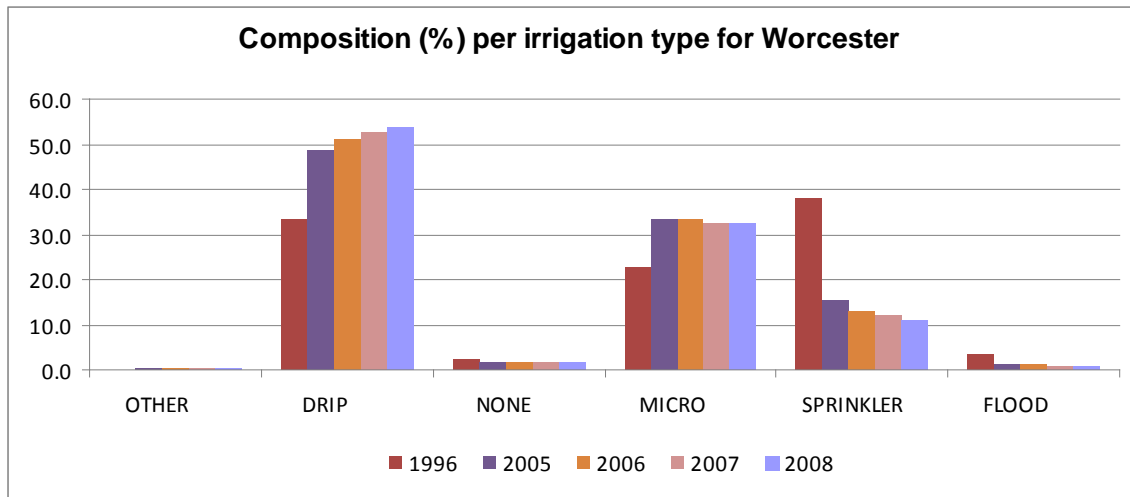


Figure 39: Irrigation types Worcester

9 Plant material

As far as plant material is concerned, the required 5,000 hectares annual plantings of wine grape vineyards did not materialise over the past four years and it is clear that it will definitely not materialise in 2009 either. The projected available grafted vines in nurseries amount to 10.4 million at most. This means that a maximum of 3,500 hectares may be established in 2009 provided all the vines in the nurseries are planted. Of these 37% are red varieties.

Orders for 2009 are similar to those of 2008, which means that the number of grafted vines that will be available in 2010 will be approximately the same and the demand for red varieties has increased to 41%. If all the vines are not established in 2009, an additional 2 million vines could possibly be made available from the cold rooms in 2010, thereby increasing the maximum to 4,000 hectares.

In 2010 83 million red and white bud material may be available for grafting, if required by the market and if the nurseries have the capacity. Good quality material from the most important white and red varieties will be available except for Colombar, Pinot gris and Muscat d'Alexandrie (Hanepoot). A slight increase is foreseen for 2010 and the volumes to be grafted may increase to 25 million, which will result in potential plantings of 4,000 hectares.

10 Summary

Although the total surface planted to wine grape vineyards has increased by almost 13% over the past 11 years, these increasing trends were reversed over the past 2 years and have started showing a slight decrease. Vineyard uprootings have maintained fairly stable levels over the past 5 years, but plantings for the same period have decreased by more than 60%. Over the past 3 years since 2006 more vineyards have been uprooted than planted and since 2005 the industry has been unable to replace 5% of existing vineyards. Minimal capital replacement and maintenance have resulted in a dramatic weakening of the age distribution of certain white wine grape varieties in particular, which are not at ideal levels. 41% of all white wine grape vineyards are older than 15 years, while almost 60% of red wine grape vineyards are between 4 and 10 years old.

The composition i.r.o. white and red varieties has changed considerably over the past 11 years. In 1998 white and red wine grape vineyards constituted 75% and 25% respectively of the total surface - in 2008 the figures were 56% white and 44% red grape vineyards respectively. Although Chenin blanc has decreased by more than 7,000 ha since 1998, it remains the most planted variety. The 10 most planted varieties (5 white and 5 red) currently constitute more than 88% of the total wine grape surface.

Over the past five years only Robertson and Worcester districts have experienced an annual net growth i.r.o. total wine grape vineyard hectares. All other districts experienced a negative growth for at least three out of the past five years.

The trend i.r.o. Sultana vineyards is looking very dismal indeed. Since 2001 uprootings have increased so drastically that the total plantings have decreased by more than 20%. More than 46% of all remaining Sultana vineyards are older than 20 years, while only 2% are younger than 4 years.