

SEASONAL OVERVIEW (WINTER & SPRING 2011) AND CROP EXPECTATIONS FOR 2012

October 2011

KLEIN KAROO (Johannes Mellet)

Winter (June – August)

Winter kicked off with cold conditions in May and June. Cold units during the critical period from mid-May to mid-June were more than sufficient for complete dormancy breaking. May to August was cooler than recent winters. Winter rainfall was very high. June especially saw abundant showers with flood damage in parts. Soils are thoroughly drenched with sufficient surface and subsoil water. Large dams in the Klein Karoo contained less than 30% water in October 2010, but are already more than 75% full this year.

Spring (September – October)

So far spring has been mild to cool with hardly any rainfall. Initial bud burst in early blocks took place slightly earlier than usual, but in most blocks bud burst occurred at the usual time. Budding is particularly even this year and mainly on spurs with very few shoots budding on cordons and trunks. Initial growth is even and strong. Flower cluster numbers and sizes look very promising. Climatic conditions have been favourable for the development of oidium, but so far have not favoured the development of downy mildew at all.

Grapevine planting statistics (Sawis)

Since 2007 the total hectares planted to wine grapes have decreased annually, by 1.7% in 2007, 2.1% in 2008, 4.9% in 2009 and 5.1% in 2010. The decrease is gaining momentum and there are not nearly 5% new plantings per annum. In 2010 only 2.5% of the surface planted to grapevines in the Klein Karoo was replaced by new plantings, compared to 1.4% in 2009. On average vineyards are ageing and a further decrease in total surface will be inevitable in forthcoming seasons.

Most planted cultivars are Colombar, Chenin blanc and Ugni blanc.

Crop expectations 2012

Following a 20% decrease in the 2010 crop, there was a small increase in the 2011 crop. The worst affected areas by the 2011 drought (Oudtshoorn and Ladismith) should crush more grapes this year. Weather conditions during bunch initiation in October/November 2010 were better than the past three seasons. The cold and wet winter and good bud burst bode well for a good season. Flower cluster numbers and sizes look very promising so far. Uprooting still exceed plantings and a few hectares were destroyed by flood damage this past winter. At this stage a 7.5% increase on the 2011 crop is expected. However, weather conditions during flowering may yet impact on the eventual crop.

BREEDEKLOOF (Leon Dippenaar)

Winter (June – August)

June was very wet and cold. The average minimum and maximum temperatures were 6.66°C and 17.5°C respectively, compared to the corresponding long term figures of 5.02°C and 19.57°C. The average rainfall of 255.4 mm was considerably higher than the long term figure of 74.12 mm.

During July the rains stayed away, however, and the day temperatures in the second and third week exceeded 23°C in most instances. The average (minimum) night temperature was 0.84°C lower and the average (maximum) day temperature was the same as the long term average. The average rainfall of 29.4 mm was considerably lower than the long term figure of 115.76 mm.

August precipitation (47.8 mm) was slightly lower than the long term figure of 87 mm. Winter therefore kicked off wet and cold, but ended slightly warmer in August. Sufficient cold units accumulated during the winter months for normal bud burst.

Spring (September – October)

Due to the lower soil moisture content and especially warmer day temperatures at the end of August, bud burst in the vineyards occurred at the normal time, followed by a growth spurt. Bud burst in Chardonnay especially was very even this year.

In September the rainfall (55.7 mm) was slightly higher than the long term average (48 mm). The average minimum temperature was 1°C lower and the average maximum temperature 0.7°C higher than the long term temperature. The warmer day temperatures in September were probably responsible for even bud burst and vigorous initial growth in cultivars that are usually later. Even shoot growth is also a characteristic of this year and minimal canopy management actions such as the tipping of shoots (“uitskieterlote”) are recommended.

So far there have been no reports of disease. Snails, however, appear to be a big problem this year.

Grapevine planting statistics (Sawis)

The total area planted to grapevines in Bredekloof – as on 30 November 2010 – amounts to 12 567.78 ha, 67% of which are planted to white grapes and 33% red grapes. The total hectares in November 2008 amounted to 12 248 ha. Over this three-year period there was consequently a net increase of 319.78 ha, with white grapes accounting for 279.11 ha and red grapes for 40.67 ha of the increase.

From personal observations a further increase in red grapes can be expected, if one takes into account the 2011 plantings. On the red side Cabernet Sauvignon and Merlot remained fairly stable in the period from 2008 to 2010, while Ruby Cabernet is gradually decreasing. Cinsaut showed a decrease of 60 ha, while Pinotage increased by an impressive 116 ha. From personal records of 2011 plantings, it seems that Pinotage is likely to continue this trend.

On the white side Colombar and Chenin blanc showed the biggest growth in the period from 2008 to 2010 with 228 ha and 116 ha respectively, followed by increases in Sauvignon blanc (67 ha) and Chardonnay (37 ha).

Crop expectations 2012

At this stage the budding percentage looks very good. The percentage flower clusters per shoot also appears to be quite normal. The weather conditions during the flowering and set periods may still play a significant role.

Plantings may have a positive impact, with a large number of Chenin blanc and Colombar vineyards coming into production. On the other hand, the age

composition – with an increasing percentage of older vineyards – may possibly have a negative impact.

All things considered, the 2012 crop is expected to be approximately 5% bigger than the 2011 crop.

OLIFANTS RIVER (Jeff Joubert)

Winter (June – August)

June temperatures were particularly favourable for good dormancy breaking in the vineyards. At the beginning of July there was a period with especially high temperatures. In some instances maximum temperatures shot up to 30°C. In general, however, it was a fairly cold winter.

Relatively good rainfall of 21 mm occurred in June, thereafter the rains stayed away with only 5 mm in July and 13 mm in August – hence the bad flower year.

Spring (September – October)

Normal to slightly cooler spring conditions were experienced with a few warm days and particularly chilly nights. The usual westerly winds have prevailed in the afternoons, resulting in further cooling. There has been no rain in any significant quantities so far, but vineyards are wet with dew most mornings. Initial bud burst in Chenin blanc was approximately one week to 10 days earlier than usual, but the later cultivars such as Sauvignon blanc, Cabernet Sauvignon and Hanepoot do not differ meaningfully from bud burst dates in the past. In most cultivars bud burst was very good and even – also in Chardonnay that had not been treated with dormancy breaking products. The only exception is probably Shiraz, with very uneven bud burst in places.

On the whole vineyards are looking very good, with great vigour, a healthy green colour and no symptoms of any shortfalls. In many instances producers have already sprayed twice against fungal diseases.

So far – probably due to the favourable climate – there have been no reports of disease outbreak.

Grapevine planting statistics (Sawis)

The trend to uproot uneconomic red blocks persists, and these blocks are mainly replaced by Colombar or Steen. The only red cultivar to be planted in

significant quantities is Pinotage. A fair amount of Currants and Merbein Seedless have been planted over the past three years.

Total plantings in the Olifants River have increased by almost 1 000 ha over the past 10 years.

The most important cultivar to be planted is Colombar – this ensures that the total production of ageing vineyards remains fairly constant – followed closely by Chenin blanc.

Crop expectations 2012

With only four rain days in October and just two in November there were more than sufficient sunlight hours and enough heat to ensure optimal bunch initiation.

The Olifants River probably has one of the most even production patterns in the SA wine industry, with relatively little year on year fluctuation.

The net effect of uprooting and plantings is that production remains largely constant with a slight upward trend.

Weather conditions in winter and spring so far have been optimal for most cultivars (possibly with the exception of Shiraz) – therefore a crop similar to or even better than last season can be expected.

ORANGE RIVER (Henning Burger)

Winter (June – August)

Leaf fall only started at the end of May due to mild temperatures during the first part of the month, with temperatures subsequently beginning to drop gradually. Temperatures during the last week of May and the first three weeks of June were low, both at night (-2°C to 3°C) and during the day (12°C to 18°C). This is reflected in the total cold units that had accumulated by the end of June. By the end of July the cold units in certain areas were the highest in a decade. Chilly weather set in gradually this year with a concentration of cold conditions during the important dormancy breaking period from the end of May to mid-June. In certain areas twice as many cold units had accumulated by mid-August than over the same period in 2010. Showers occurred in June, thus increasing the humidity in the area. Rainfall during the winter period was normal compared to the long term average.

Spring (September – October)

Bud burst in the early cultivars started on 7 September. Budding was even in most cultivars and the percentage was good. The budding percentage in cane-pruned grapevines especially was excellent – probably due to proper cold that prevailed in the area in the critical time from the end of May to mid-June. Fertility is good in most cultivars with both Colombar and Chenin blanc displaying double bunches in most instances. Sultana looks like an average crop with certain blocks having lots of bunches and others being below average. Low day and night temperatures occurred during the week of 18 - 24 September, causing diminished shoot growth. Light frost occurred in certain low-lying areas, but the damage was not of economic significance. Certain blocks with low reserve status displayed growth arrest symptoms after the cold period. Temperatures remained average until 7 October; thereafter they increased to normal levels for this time of the year. Blocks that were submerged by the flood in January/February are displaying a decrease in yield. In extreme cases individual vines and even complete blocks died completely. In most instances, however, blocks recovered better than initially expected. No rainfall has occurred. Grapevines are healthy with no visible diseases.

Grapevine planting statistics (Sawis)

In 2009 and 2010 the plantings of wine grapes exceeded uprooting. The same trend is expected in 2011 with an anticipated 130 ha to be planted. The wine grape cultivars that are mostly uprooted are old, unproductive cultivars such as Chenel, Raisin blanc, Clairette Blanche, etcetera. The cultivars which make the biggest contribution to plantings in 2011 are Villard Blanc, Chenin blanc, Shiraz, Petit Verdot and Colombar, with Villard Blanc being the most planted – mainly for juice production. The total plantings of wine grapes along the Orange River are increasing, but currently the replacement of old vines is not happening at 5% per annum. New plantings will therefore not have a hugely positive effect on total intake in the short term. Sultana is being uprooted on a large scale and replaced by Merbein especially. Uprooting of the raisin cultivars far exceed the plantings, however. Merbein is being planted at an enormous rate due to the favourable price of raisins in the market.

Crop expectations 2012

The wine grape crop is estimated to be 20 - 25% bigger than in 2011. Colombar and Chenin blanc are looking very good this year. Flowering has not started yet, but flowers and fruit set may benefit from the slightly higher temperatures that are expected. If no unforeseen weather conditions such as frost, hail and floods occur, indications at this stage are that a good crop may be expected in the Orange River area in 2012.

PAARL (Johan Viljoen)

Winter (June – August)

The past winter experienced fluctuating temperatures. On the whole it was very cold with regular snow on the mountain peaks in the Boland. According to available records the accumulated Richardson cold units were the highest since 2006. The average minimum temperature data indicate that temperatures in May and July were warmer than the long term average, while June and August were cooler than the long term average. The total rainfall for June to August was approximately 320 mm – approximately 60 mm more than during the same period in 2010. Up to now the total annual precipitation was approximately 520 mm, compared to the average of 850 mm per annum over the past six years. Rainfall is therefore far below average and the levels of farm dams especially, which are supplemented from runoff, are below 50%.

Spring (September – October)

The fluctuating weather conditions continued in September and October. From the beginning of September there has only been about 30 mm rainfall, which further exacerbates concerns about a shortage of irrigation water. Night temperatures often dropped to below 10°C and until now there have been only a few warm days with maximum temperatures above 25°C. Although bud burst was a little slow due to the cooler weather, budding was even in all cultivars except Shiraz. In Shiraz vineyards where dormancy breaking products had been used, budding was fairly even. On the whole bud burst in vineyards took place at the same time as in 2010.

Initial shoot growth was slow in view of the cooler conditions, but since the beginning of October day temperatures have been warmer and subsequently shoot growth in all cultivars has been vigorous.

From bud burst onwards, long horn grasshoppers have appeared on young shoots. The presence of snails in places has caused a lot of damage in some instances. There has been sporadic damage by other insects, for example snout beetles and centipedes, and it is especially noticeable in vineyards with a lot of organic material.

Grapevine planting statistics (Sawis)

Total plantings in Paarl decreased for the sixth consecutive year, the latest decrease of 90 ha bringing the total plantings to 16 570 ha. Paarl, long the biggest wine district in terms of surface planted to vines, has occupied the second position after Stellenbosch since 2008. Currently the cultivar composition in Paarl is 58% red and 42% white wine grape cultivars. Approximately 40% of the white cultivars in the region are currently older than 20 years. This demonstrates the financial pressure on producers in Paarl, with the result that replacement is being neglected. Chenin blanc (19%) is the most important white wine grape cultivar with Chardonnay (8%) in the second and Sauvignon blanc (6%) in the third position. With regard to red cultivars, the biggest surface is planted to Cabernet Sauvignon (17%), with Shiraz (13%) in second position.

Judging from these statistics, the total production of wine grapes in Paarl is expected to decrease.

Crop expectations 2012

The environmental conditions during the flower cluster initiation period in 2010 (October to November) were not ideal in my opinion, with regular showers and cooler temperatures. Even so bud fertility appears to be very good, judging from the large number of flower clusters across all cultivars. Two flower clusters per shoot is a common sight in Chardonnay and very high fertility is once again observed in young vines. Despite uneven budding in Shiraz, there appears to be sufficient flower clusters. Unfortunately it seems as though fewer flower clusters developed in older Chenin blanc vineyards. If this proves to be the case throughout the region, it will certainly have a negative impact on the crop.

The total crop in Paarl increased slightly in 2011 ($\pm 128\,000$ tons) from the low in 2009 (121 800 tons). A further decrease in crop size can be expected in 2012 – especially in view of adjustments to pruning and trellis systems aimed

at higher yields. Available irrigation water – or sufficient rain throughout the growing season – will play a decisive role in the final crop size of 2012. It is currently drier than usual and soil water, as well as the levels of many farm dams, is less than ideal at this early stage of the season.

ROBERTSON (Hennie Visser)

Winter (June – August)

Weather conditions were suitably cold from mid-May to mid-June, a period when cold conditions are critical for dormancy breaking. According to the hypothesis for dormancy breaking, there was considerably colder than what is required for good bud burst.

Very good rainfall occurred in the period June to August. Rainfall measured at the Robertson Experiment Farm weather station was 15% higher than the long term average. Where cover crops had been established, very good growth was obtained. More showers occurred in the Langeberge and farmers who are dependent on runoff from the dams in the mountain now have full dams for the first time in three years.

Spring (September – October)

Bud burst was very good and even due to the cold winter. Initial growth is also good and so far there has been little wind. Bud burst varied considerably depending on the pruning date, but was approximately a week earlier than usual in the first blocks. Growth is good and even at the moment thanks to good soil water content, little wind, favourable spring weather and absence of diseases. Snails appear to be very problematic at this early stage. Erinose symptoms are already visible in some cultivars.

Grapevine planting statistics (Sawis)

From 2008 to 2010 Robertson Wine Valley had net plantings of 51.52 ha. Over the same period white varieties decreased by 85.7 ha and red varieties by 137.3 ha. It is therefore clear that red cultivars represent a bigger percentage of grapevine plantings in the Robertson Wine Valley. In 2010 there was a net decrease of 48.3 ha (white and red varieties). The most planted white varieties in this period are Colombar, Chenin blanc, Sauvignon blanc and Chardonnay. The most planted red varieties include Shiraz, Cabernet Sauvignon, Pinot Noir and Pinotage. Despite the net planting trend

of the past three years, it is disquieting that 5% of the total plantings are not being replaced annually. Looking at a productive lifespan of 20 years, this means that the age distribution is changing systematically and the average age of the vines is getting older. In the long run this will definitely impact negatively on yield.

Crop expectations 2012

At this early stage the 2012 crop is expected to be better than the average crop of 2011. Despite the cooler weather in October and November (at the time of bunch initiation), there are more flower clusters than in 2010. Flower clusters are well-developed and most of them have side clusters. Bud burst in most of the bud spurs was good and even. The net plantings should not impact greatly on the total crop, because the average age of the grapevines is getting older. Producers are nevertheless trying to increase yields for sustainable production. Farmers who depend on runoff from the Langeberge have full dams and this will definitely impact positively on the total crop size.

STELLENBOSCH (Conrad Schutte)

Winter (June – August)

This year Stellenbosch district had a warm, dry winter. Rainfall measured at the Nietvoorbij weather station indicates that June and July rainfall was altogether 84 mm less than the 48-year average. This trend changed in August, which received 12 mm more rain than the long term average. August is also the only month in 2011 which received above-average rainfall. Several irrigation dams do not have sufficient water. Average minimum and maximum winter temperatures are also higher than the long term average, the minimum August temperature being the exception and slightly lower.

At the beginning of the winter (the last two weeks of May and the first two weeks of June) the cold was theoretically sufficient to satisfy the grapevines' needs. Cold conditions during the above period were also better than during the corresponding period in 2010.

Spring (September - October)

This year bud burst was approximately seven days earlier than last year depending on vineyard location. Bud burst was even, except for some Chardonnay, Sauvignon blanc and Shiraz blocks in the region. Colder

conditions after bud burst caused initial shoot growth to be slow, followed by warmer conditions which stimulated shoot growth.

Up to now spring has been dry with measurements at the Nietvoorbij weather station showing 11 mm less rain on average for September. At the end of September the region was already 176 mm below the average annual rainfall figure. Spring is also characterised by lower average minimum and maximum temperatures than the long term average.

Sufficient soil moisture in the topsoil – combined with warmer conditions – creates favourable conditions for weeds.

Erinose has been spotted in Chenin blanc and Sauvignon blanc. Snails occur in very large quantities on new shoot growth and are problematic. Snout beetles have been noticed in certain areas, although no damage to speak of has been caused. The incidence of long horn grasshoppers is less than last season, but the populations are being carefully monitored.

Grapevine planting statistics (Sawis)

During the 2009/2010 season 120 ha more wine grapes were uprooted than planted. Plantings amounted to 261 ha, with white cultivars accounting for 125 ha – mainly Sauvignon blanc, Chardonnay and Chenin blanc. Approximately 136 ha red cultivars were planted, consisting mostly of Cabernet Sauvignon, Pinotage, Shiraz, Pinot Noir and Merlot.

During this period 381 ha grapevines were uprooted, notably 186 ha white and 195 ha red cultivars. Sauvignon blanc, Chenin blanc, Chardonnay, Cape Riesling and Weisser Riesling were the most uprooted white cultivars, while the most uprooted red cultivars include Cabernet Sauvignon, Merlot, Shiraz, Pinotage and Cinsaut.

From the above it transpires that the trend continues from the previous season, namely that uprooting exceed plantings. Over the past four years (since 2007) the total area planted to vines has decreased by 250 ha.

Crop expectations 2012

If producers protect their vineyards sufficiently against the possible late outbreak of fungal diseases during the remainder of the growing season, a good crop may be expected. Wet and cold conditions prevailed during the previous season's bunch initiation period, with detrimental effects. Currently all observations are positive, however, in terms of both bunch size and

number of bunches per shoot. It is vital, however, that favourable weather conditions prevail during the flowering period. Due to the abovementioned decrease in area planted to vines in the region, it is likely that total production will be affected negatively.

MALMESBURY (Braham Oberholzer)

Winter (June – August)

As far as cold conditions are concerned, the biggest part of the Swartland experienced sufficient cold at the end of May and beginning of June to satisfy the required cold demands for dormancy breaking. Reasonably good showers fell at the end of May and in June, but July was particularly warm and dry. Rainfall was far below average, with July and August being very dry. Many dams are still not full and the subsoil is not at field capacity either. Follow up rains throughout the season will therefore be very important to ensure a good crop.

Spring (September – October)

Bud burst is very even despite hot conditions in July. In grapevines that struggled the previous season, bud burst occurred at the tips – especially Chenin blanc and Chardonnay – but on the whole the vines remained dormant.

Once again bud burst was two weeks earlier. The dry land coastal regions experience uneven bud burst in Shiraz for which viticulturists in the area have no explanation.

There are hardly any signs of fungal disease.

Grapevine planting statistics (Sawis)

In respect of surface planted to wine grapes net annual growth has been negative for the past three years. For the period 1 December 2009 to 30 November 2010 altogether 345 ha were uprooted, 228 ha being white and 117 ha red. At the same time only 99 ha (62 ha white and 37 ha red) were planted. Chenin blanc, Cabernet Sauvignon and Cinsaut were the most uprooted cultivars.

The most planted white and red cultivars respectively are Chenin blanc and Shiraz. Certain areas follow a strategy to plant the white cultivars such as

Chenin blanc, Chardonnay, Sauvignon blanc and Colombar late and the red cultivars earlier.

Crop expectations 2012

Plantings display a steep downward curve and total production in the area will inevitably decline. The potential for a satisfactory crop appears to be good, but much will depend on follow-up rain in the forthcoming months. Indications are that an average crop at most can be expected.

WORCESTER (Pierre Snyman)

Winter (June – August)

Winter started early with sufficient cold at the end of May and beginning of June. This augured well for bud burst.

Precipitation was good at the beginning of winter with 106 mm being recorded in June, as measured at the Nuy weather station. In July (23 mm) and August (28 mm) and especially September (1.6 mm) rain was much less than the previous year. This caused grapevine soils to be much drier at the start of the growing season than the previous year and consequently producers started irrigating early. Most farm dams are full, but will come under pressure if no additional rain falls during the rest of the season.

Spring (September – October)

Soils remain dry and consequently warmer than the previous year. Budding is very even (as expected) and took place at more or less the same time as in 2010. Even in cultivars that are known for uneven budding patterns, such as Cabernet Sauvignon and Shiraz, bud burst was more even this year.

The canopies also grew very quickly and fairly evenly, because they were not exposed to greatly fluctuating day temperatures.

It is still too early to report much about diseases, but in view of the current dry conditions, not much oidium or downy mildew is foreseen.

Grapevine planting statistics (Sawis)

In 2010 188 ha white and 97 ha red varieties were planted. This clearly shows that more white than red is currently being planted. The most important cultivars were Chenin blanc, Colombar, Pinotage and Shiraz.

Total plantings to grapevines at the end of 2010 were 8 648 ha – 17 ha fewer than in 2009. This indicates that uprooting exceeded plantings.

Crop expectations 2012

Bud burst was very even and judging from the flower clusters that are already clearly visible, above-average yield can be expected from practically all cultivars. Figures about uprooting for 2011 are not yet available, but the total crop may be expected to exceed the 2011 crop by 10%.

Compiled by VinPro Consultation Services
