

## HARVEST AND SALES ESTIMATE - JANUARY 2010

WINE PRODUCED	Average % alc/vol 2009	million gross litres							Trend 2010/ 2009
		2004	2005	2006	2007	2008	Estimate		
							2009	2010	
Wine		696.8	628.5	709.7	730.4	763.3	780.7	757.8	97.1
Wine for brandy	11.55	85.4	82.9	82.1	101.5	86.6	69.8	48.2	69.1
Grape juice concentrate and grape juice	11.04	87.8	64.6	73.2	65.2	72.5	36.7	59.3	161.7
Distilling wine	9.71	145.8	129.2	147.9	146.4	166.6	128.3	130.9	102.0
<b>Total</b>		<b>1 015.7</b>	<b>905.2</b>	<b>1 013.0</b>	<b>1 043.5</b>	<b>1 089.0</b>	<b>1 015.4</b>	<b>996.2</b>	<b>98.1</b>

WINE MARKET REQUIREMENT	million gross litres							Trend 2010/ 2009
	2004	2005	2006	2007	2008	Estimate		
						2009	2010	
Producer sales to wholesalers: Wine in bulk	416.1	419.1	405.5	440.1	539.0	513.1		
Grapes	67.8	67.5	71.8	67.2	70.9	71.1		
	<b>483.8</b>	<b>486.6</b>	<b>477.3</b>	<b>507.3</b>	<b>609.9</b>	<b>584.1</b>		
Direct producer sales (packaged wine) and exports	154.5	148.2	155.4	173.4	200.1	192.6		
<b>Total</b>	<b>638.3</b>	<b>634.8</b>	<b>632.7</b>	<b>680.7</b>	<b>810.0</b>	<b>776.8</b>	<b>779.9</b>	
Wine imported in bulk by wholesalers*		15.4	11.3	9.2	11.0	12.3	9.2	
<b>Total wine market requirement</b>	<b>638.3</b>	<b>650.2</b>	<b>644.0</b>	<b>690.0</b>	<b>821.0</b>	<b>789.1</b>	<b>789.1</b>	<b>100.0</b>

\* concentrate component included

WINE PRODUCTION AND SALES	million gross litres							Trend 2010/ 2009
	2004	2005	2006	2007	2008	Estimate		
						2009	2010	
Total wine stock at private and producer cellars on 1 Jan						357.2	336.4	
Wine production	696.8	628.5	709.7	730.4	763.3	780.7	757.8	97.1
Natural wine and must for sweetening imported by private and producer cellars	2.0	3.7	7.0	3.7	8.0	3.8	0.0	0.0
<b>Minus: Sales</b>	<b>638.3</b>	<b>634.8</b>	<b>632.7</b>	<b>680.7</b>	<b>810.0</b>	<b>776.8</b>	<b>779.9</b>	<b>100.4</b>
Transfers (previous vintages)	6.2	5.4	3.6	10.2	6.1	5.0	5.0	100.0
Lees destroyed/shortages	22.0	17.7	18.2	22.7	23.6	23.6	23.6	100.0
Total wine stock at private and producer cellars on 31 Dec	<b>363.7</b>	<b>339.4</b>	<b>403.1</b>	<b>425.2</b>	<b>357.2</b>	<b>336.4</b>	<b>285.8</b>	<b>84.9</b>
Total wine stock at producer cellars on 31 Dec	248.5	221.1	278.4	295.4	236.2			
Total wine stock at private cellars on 31 Dec	115.2	118.3	124.6	129.8	121.0			

DISTILLING WINE MARKET REQUIREMENT	million litres @ 10% alc/vol							Trend 2010/ 2009
	2004	2005	2006	2007	2008	Estimate		
						2009	2010	
Ex bedryf	149.9	130.33	148.5	154.6	168.0	129.7	133.0	102.5
Ex import (current year)	16.0	24.3	31.1	39.6	10.4	4.1	9.2	224.8
Ex import (previous year)	-	30.0	10.0	-				
Ex pool	1.9	1.8	1.4	0.04	0.46	0.04	0.04	100.0
<b>Total</b>	<b>167.8</b>	<b>186.4</b>	<b>191.0</b>	<b>194.2</b>	<b>178.8</b>	<b>133.8</b>	<b>142.2</b>	<b>106.3</b>
Pool deliveries	1.9	1.8	1.4	0.04	0.46	0.04	0.04	100.0
Ex import (destined for following year's market requirement)	30.0	10.0						