



Statistics of Wine-grape Vines as on 30 November 2009

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Statistics i.r.o. South African wine grape vineyards over the past 10 years (1999 - 2009)

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Insert:

White and Red Varieties planted and uprooted

Status of Red and White varieties

1 Overview

Total hectares for 2009 stand at 101 259 ha compared to 101 325 ha of 2008. Until 2006 the total surface showed an annual increase; since then a steady decrease.

Viognier and Pinot Noir (Table 1) have improved their ranking amongst the top 20 wine grape varieties. Nouvelle joined the list at number 20 displacing Palomino.

Over the past 6 years there was no significant change in the hectare percentage white and red wine grapes.

Individual wine grape varieties: In 1999 Chenin blanc represented 27% of the total wine surface, Colombar 13%, Cabernet Sauvignon 8%, Sauvignon blanc 6%, Chardonnay 6%, Pinotage 6%, followed by the varieties detailed in Table 4. In 2009 both Chenin blanc (18%) and Muscat d’Alexandrie (2%) decreased significantly. Red varieties such as Cabernet Sauvignon, Shiraz and Merlot increased significantly over this period.

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. This is based on an economic life span of 20 years. 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.

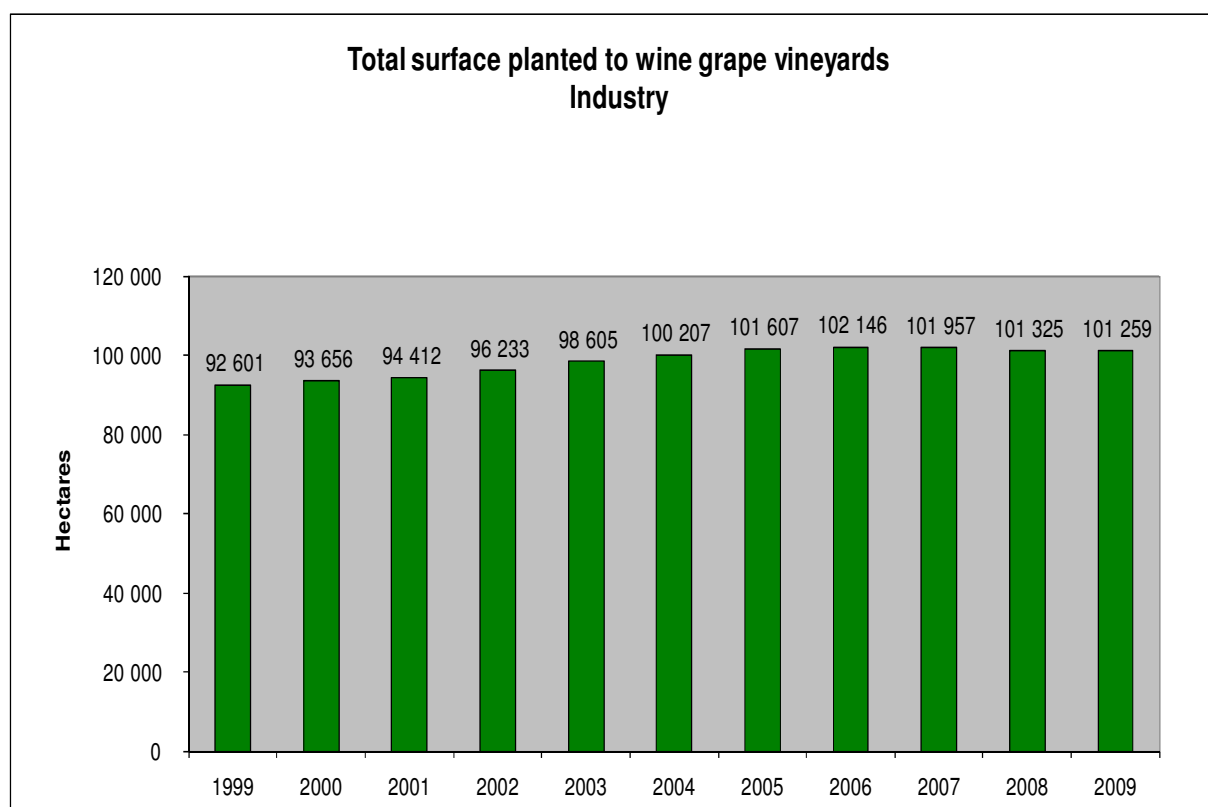


Figure 1: Total surface planted to wine grape vineyards in the industry

No	VARIETY	1999 (ha)	2009 (ha)	No	VARIETY	1999 (ha)	2009 (ha)
1	CHENIN BLANC	24 767.67	18 668.29	51	TINTA AMARELLA	0.92	23.85
2	CABERNET SAUVIGNON	6 962.90	12 469.01	52	DURIF	0.07	23.09
3	COLOMBAR	11 672.57	11 937.09	53	VERDELHO	1.03	22.41
4	SHIRAZ (SYRAH)	3 469.28	10 006.24	54	TEMPRANILLO	13.16	19.86
5	SAUVIGNON BLANC	5 277.46	9 445.60	55	GAMAY NOIR	36.81	19.08
6	CHARDONNAY	5 983.25	8 348.98	56	PINOT BLANC	50.74	18.46
7	MERLOT	3 700.87	6 588.30	57	NEBBIOLO	6.84	18.36
8	PINOTAGE	5 698.42	6 105.04	58	WINEGRAPE VARIETY	47.36	18.30
9	RUBY CABERNET	1 563.95	2 281.03	59	WELDRA	66.56	14.91
10	MUSCAT D'ALEXANDRIE	4 520.77	2 263.98	60	MUSCAT OTTONEL	34.32	14.51
11	CINSAUT	3 698.75	2 135.87	61	ALICANTE BOUSCHET	2.57	12.75
12	SEMILLON	1 021.57	1 167.20	62	MEUNIER	4.51	11.17
13	CABERNET FRANC	352.78	957.86	63	SEMILLON (RED)	3.94	9.25
14	VIOGNIER	11.77	894.51	64	CINSAUT BLANC	75.43	7.02
15	PINOT NOIR	429.67	843.85	65	COLOMINO	16.03	4.58
16	CROUCHEN (CAPE RIESLING)	2 762.29	727.02	66	PONTAK	9.82	3.95
17	MUSCAT DE FRONTIGNAN (MUSCADEL)	797.28	684.10	67	PEDRO LUIS	102.99	3.70
18	PETIT VERDOT	70.59	649.75	68	TOURIGA FRANCA	0.29	3.25
19	MALBEC	39.98	442.76	69	PORT VARIETY	5.93	3.13
20	NOUVELLE	1.89	397.72	70	HANEPOOT (RED)	10.67	2.97
21	MATARO (MOURVEDRE)	2.84	373.20	71	GRENACHE (GRIS)	0.00	2.47
22	MUSCADEL (RED)	405.53	364.33	72	GRACHEN	0.47	2.30
23	PALOMINO (WHITE FRENCH)	2 538.03	330.23	73	BOURBOULENC	5.33	2.20
24	CLAIRETTE BLANCHE	1 317.34	305.43	74	KERNER	24.63	2.13
25	TINTA BAROCCA	395.72	244.32	75	TINTA FRANCISCA	1.94	1.89
26	WEISSER RIESLING	594.56	222.27	76	CORNIFESTO	1.26	1.54
27	PINOT GRIS	124.55	215.92	77	SYLVANER	9.01	1.09
28	VILLARD BLANC	0.10	170.68	78	RIESLING TROLL	0.00	0.81
29	GRENACHE (RED)	41.81	169.80	79	SCHONBURGER	3.44	0.32
30	FERNAO PIRES	362.06	153.11	80	BASTARDO DO CASTELLO	0.03	0.03
31	ROOBERNET	37.82	138.95	81	KEUKA	0.02	0.00
32	EMERALD RIESLING	401.15	126.97	82	OTHELLO	4.04	0.00
33	GEWURZTRAMINER	239.01	115.72	83	BAST MENUDO	0.00	0.00
34	THERONA	186.61	99.99	84	CINSAUT GRIS	0.04	0.00
35	CHENEL	433.74	92.19	85	HEROLDREBE	0.00	0.00
36	TOURIGA NACIONAL	23.43	89.45	86	SAVVATIANO	1.16	0.00
37	CARIGNAN	73.32	81.53	87	FURMINT	25.59	0.00
38	BUKETTRAUBE	331.95	75.78	88	VITAL	0.26	0.00
39	RAISIN BLANC	717.79	73.58	89	BURGER	0.00	0.00
40	UGNI BLANC	188.96	66.42	90	FLORA	0.25	0.00
41	SANGIOVESE	23.50	65.85	91	FOLLET	0.25	0.00
42	HARSLEVELU	398.48	62.25	92	MULLER-THURGAU	2.48	0.00
43	TANNAT	0.68	61.89	93	CSERSZEGI FUSZ	0.04	0.00
44	BARBERA	10.65	48.94	94	PECS 24	0.00	0.00
45	SOUZAO	34.67	47.19	95	BRAKBOSEILAND	0.75	0.00
46	GRENACHE BLANC	27.59	44.05	96	OLASZ	0.29	0.00
47	MORIO MUSCAT	23.71	36.11	97	AUXERROIS	7.83	0.00
48	ROUSSANNE	0.00	36.04	98	SCHEUREBE	0.00	0.00
49	ZINFANDEL	42.69	33.84				
50	KANAAN	239.51	29.68				
					Total	92 601	101 259

Table 1: Plantings of selected wine grape varieties for 1999 and 2009

District	%	1999 (ha)	%	2009 (ha)
Breedekloof	10%	9 474	12%	12 427
Little Karoo	3%	3 241	3%	2 904
Malmesbury	15%	13 774	14%	14 448
Olifants River	9%	8 737	10%	9 964
Orange River	5%	4 734	5%	5 075
Paarl	18%	17 018	16%	16 673
Robertson	13%	12 109	14%	13 994
Stellenbosch	17%	15 936	17%	17 117
Worcester	8%	7 578	9%	8 658
Total	100%	92 601	100%	101 259

Table 2: Distribution of wine grape vineyards (red & white) per district as a percentage (%) and hectares of the total SA wine grape vineyards surface (1999 - 2009)

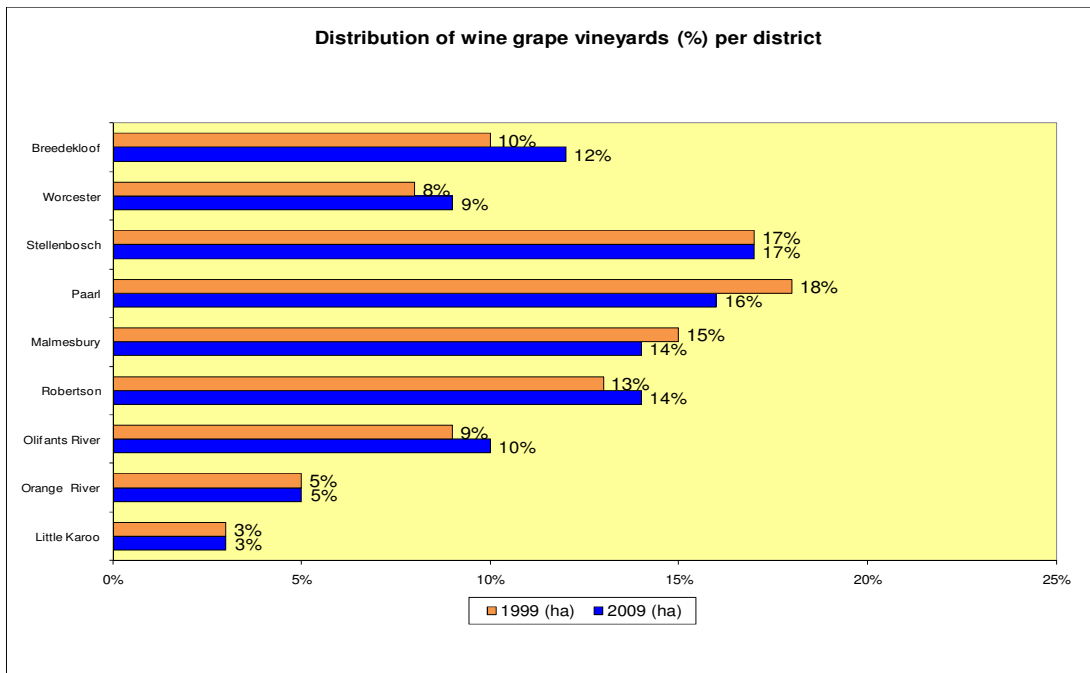


Figure 2: Distribution of wine grape vineyards as a percentage (%) per district (2009)

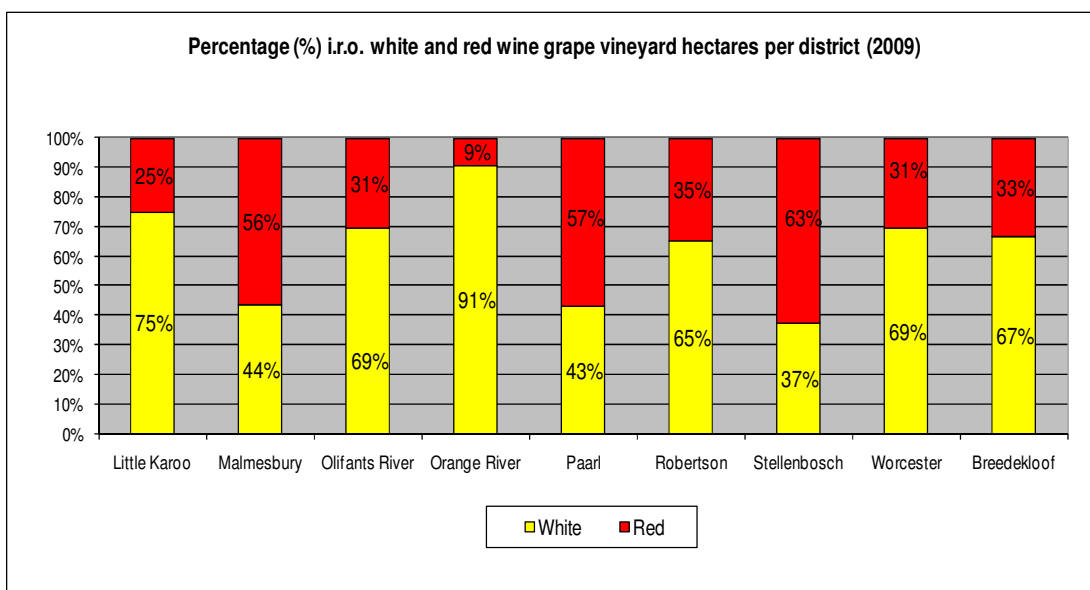


Figure 3: Percentage (%) white and red wine grape vineyard hectares per district (2009)

District	1999		2009	
	Red (ha)	White (ha)	Red (ha)	White (ha)
Little Karoo	13%	87%	25%	75%
Malmesbury	35%	65%	56%	44%
Olifants River	21%	79%	31%	69%
Orange River	7%	93%	9%	91%
Paarl	38%	62%	57%	43%
Robertson	21%	79%	35%	65%
Stellenbosch	45%	55%	63%	37%
Worcester	19%	81%	31%	69%
Breedkloof	23%	77%	33%	67%
Total	29%	71%	44%	56%

Table 3: Red and white wine grape vineyard distribution per district as a percentage (%) of the surface in each district (1999 and 2009)

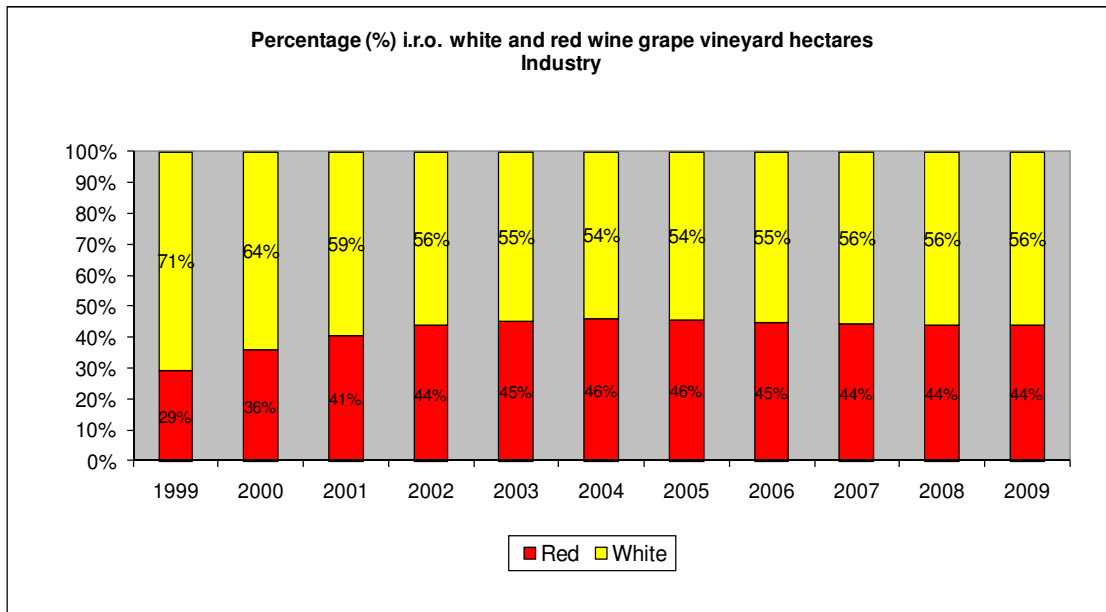


Figure 4: Percentage (%) white and red wine grape vineyard hectares

Variety	1999		2009		Change since 1999 (ha)
	Hectares	% of total	Hectares	% of total	
Chenin blanc	24 768	27%	18 668	18%	-6 099
Cabernet Sauvignon	6 963	8%	12 469	12%	5 506
Colombar	11 673	13%	11 937	12%	265
Shiraz (Syrah)	3 469	4%	10 006	10%	6 537
Sauvignon blanc	5 277	6%	9 446	9%	4 168
Chardonnay	5 983	6%	8 349	8%	2 366
Merlot	3 701	4%	6 588	7%	2 887
Pinotage	5 698	6%	6 105	6%	407
Ruby Cabernet	1 564	2%	2 281	2%	717
Muscat d'Alexandrie (White Hanepoot)	4 521	5%	2 264	2%	-2 257
Cinsaut	3 699	4%	2 136	2%	-1 563
Crouchen (Cape Riesling)	2 762	3%	727	1%	-2 035
Palomino (White French)	2 538	3%	330	0%	-2 208
Other	9 984	11%	9 953	10%	-32
Total	92 601	100%	101 259	100%	8 659

Table 4: Surface i.r.o. most planted varieties in the industry (1999 and 2009)

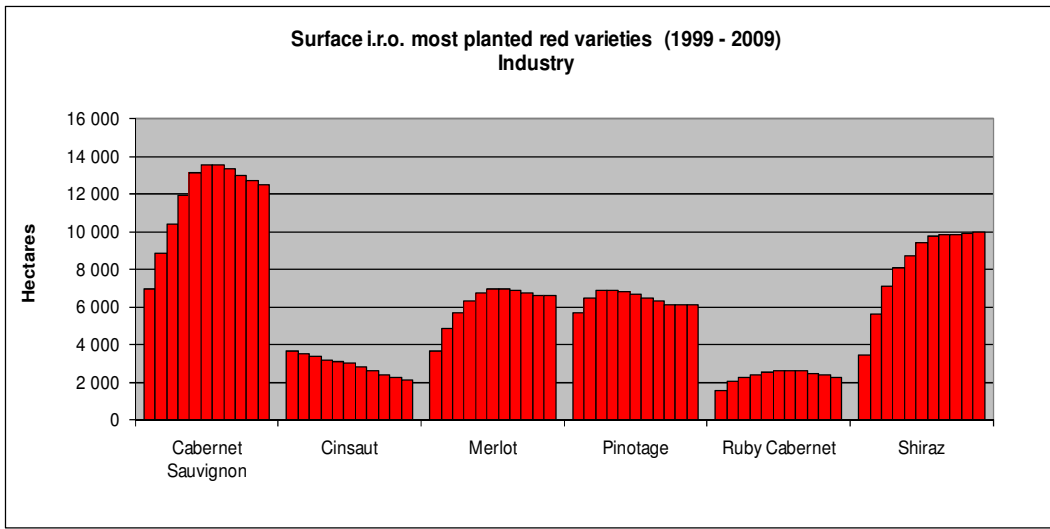


Figure 5: Surface i.r.o. most planted red varieties in the industry (1999 - 2009)

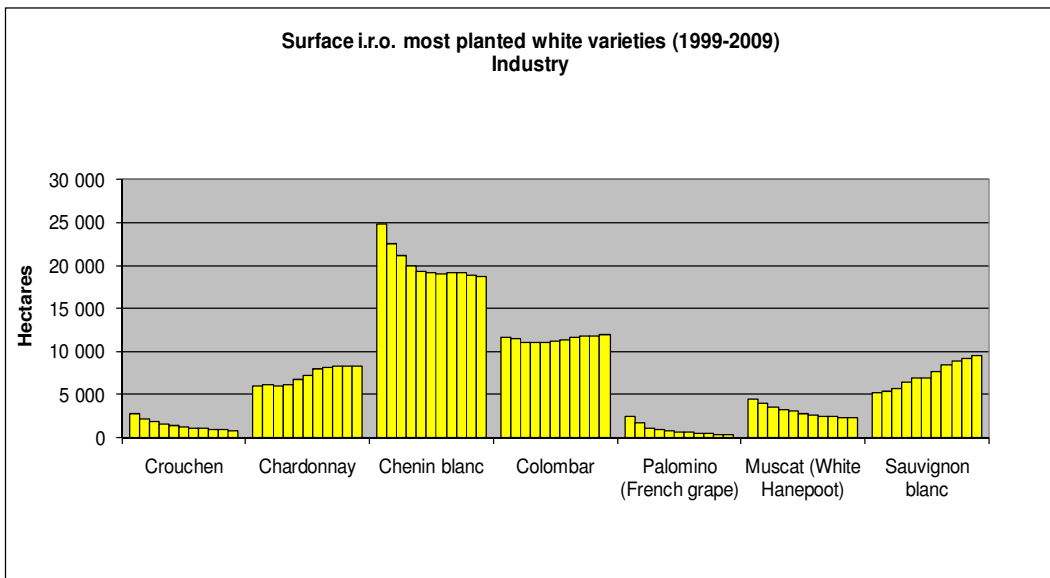


Figure 6: Surface i.r.o. most planted white varieties in the industry (1999 - 2009)

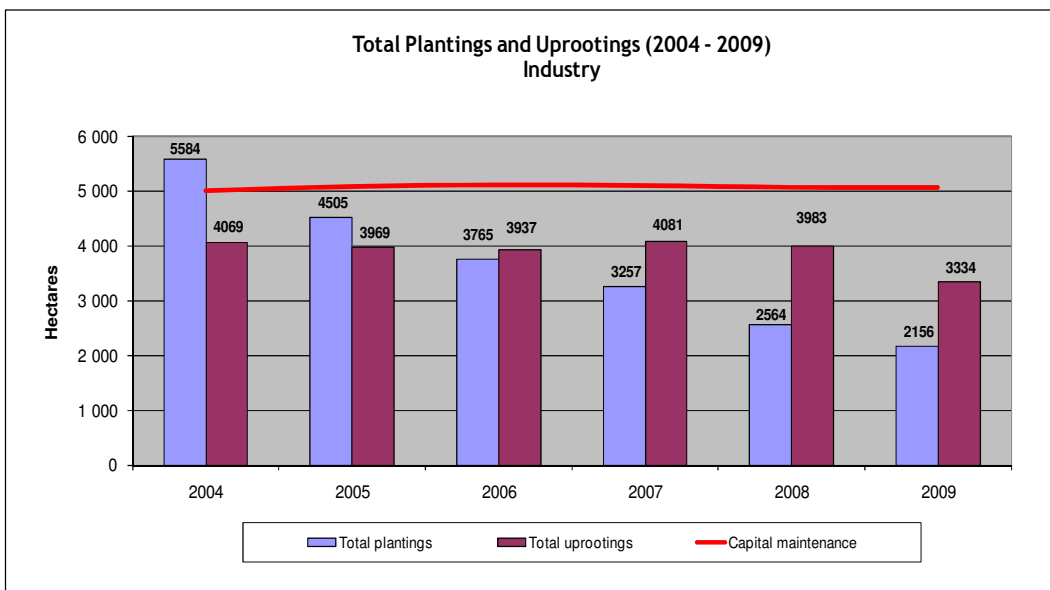


Figure 7: Plantings and uprooting i.r.o. red and white grape vineyards in the industry (2004 - 2009)

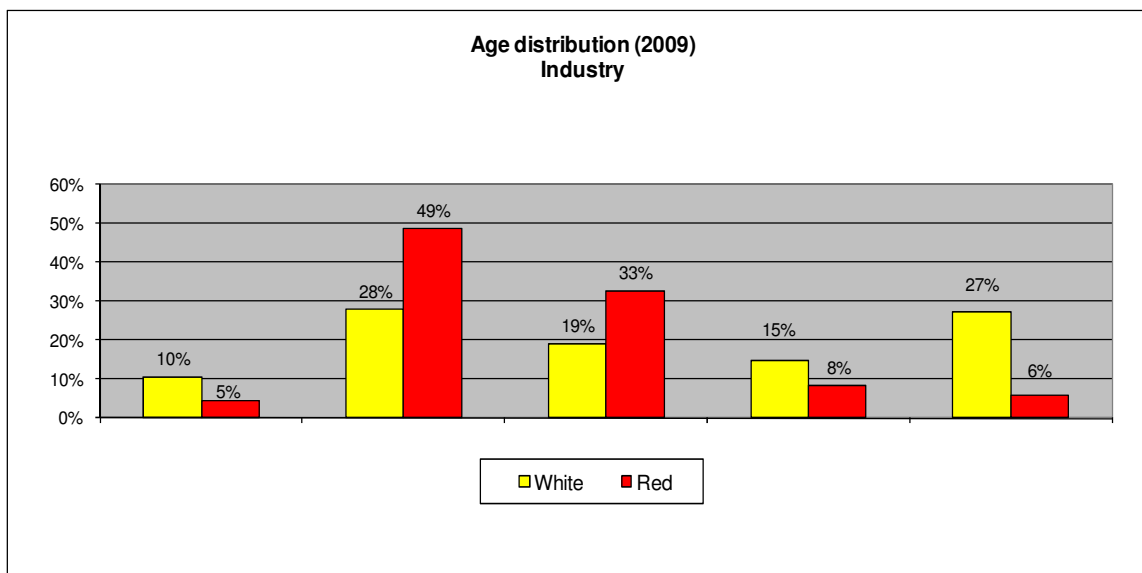


Figure 8: Age distribution of white and red wine grape vineyards (2009)

AGE OF VINES PER WINE REGION PER VARIETY GROUP FOR 2009 - % (Excluding Sultana)

AGE OF VINES	VARIETY GROUP IN WINE REGION AS % OF REGION TOTAL									
	TOTAAL HECTARES	ORANGE RIVER	OLIFANTS RIVER	MALMES- BURY	LITTLE KAROO	PAARL	ROBERT- SON	STELLEN- BOSCH	WORCES- TER	BREED- KLOOF
< 4 Years	10.5	9.6	9.8	6.7	10.4	8.2	11.8	10.5	14.7	12.1
4 - 10 Years	28.0	24.6	26.7	27.3	25.3	25.2	29.9	29.3	34.0	26.9
11 - 15 Years	19.2	39.7	19.9	16.1	21.6	14.7	19.9	14.0	16.9	17.9
16 - 20 Years	14.8	10.2	20.6	12.1	16.1	11.5	17.4	10.6	14.6	17.9
> 20 Years	27.5	15.9	23.0	37.8	26.6	40.4	21.0	35.6	19.8	25.2
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	4.5	4.8	2.5	3.0	6.1	4.2	5.9	4.7	9.4	4.2
4 - 10 Years	48.6	39.0	46.6	46.0	52.5	50.9	47.4	48.5	53.4	49.1
11 - 15 Years	32.8	43.0	43.6	37.2	29.2	29.9	36.7	26.7	28.0	36.7
16 - 20 Years	8.4	7.2	4.2	7.5	4.1	8.5	7.1	11.6	8.0	6.8
> 20 Years	5.7	6.0	3.1	6.3	8.1	6.5	2.9	8.5	1.2	3.2
Total red varieties	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

HECTARES REPLACEMENT AT AN ANNUAL RATE OF 5% - 2009 (Excluding Sultana)

	HECTARES									
	TOTAAL HECTARES	ORANGE RIVER	OLIFANTS RIVER	MALMES- BURY	LITTLE KAROO	PAARL	ROBERT- SON	STELLEN- BOSCH	WORCES- TER	BREED- KLOOF
Total white and red varieties	5 062.9	253.7	498.2	722.4	145.2	833.6	699.7	855.9	432.9	621.3
Actual Planted	2 154.0	155.0	200.0	250.0	42.0	278.0	382.0	255.0	280.0	314.0

Table 5: Replacement per wine region for 2009 - 5% (Excluding Sultana)