

Wine Industry

I N F O R M A T I O N

February 2007



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2007 GRAPE AND WINE CROP AND SALES

The 2007 wine grape harvest is estimated at 1 291 615 tons according to the industry's (producer cellars and viticulturists) estimate of 9 February 2007 (page 3). It is 43 435 tons (approximately 3 per cent) smaller than the January 2007 estimate. The indication is that the harvest will be slightly smaller by approximately 0.5 per cent than the 2006 harvest, with the early white wine cultivars displaying the biggest decrease. It is expected that the 2007 wine harvest, including juice and concentrate for non-alcoholic purposes, rebate and distilling wine included, will amount to 966 million litres at an average recovery of 771 litres per ton of grapes. It is 33,5 million litres less than the estimates of 24 November 2006 and 10 January 2007. A press release in this regard on page 2.

On page 4 the wine harvest per type as well as the sales and stock levels at producer and private cellars as on 31 December are set out. The stock situation as on 31 December 2007 will amount to an estimated 343,8 million litres, compared to 382,0 million litres on 31 December 2006.

Also in this issue – domestic sales of natural wine during the period January to December 2006 (page 5), information regarding the price ranges in which wine were sold in bulk during the period January to December 2006 (pages 6 to 9), average bulk wine price review (pages 10 and 11), exports of wine and flavoured grape liquor during January 2007 (page 12), exports per country during January 2007 (page 13), growing export markets overview (pages 14 and 15) and volume of wine certified during January 2007 (page 16).

SAWIS greetings until March
Natalie

A PUBLICATION OF:



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SA WINE COUNCIL

1 MARCH 2007 PRESS RELEASE

DECREASE IN GRAPE HARVEST

The 2007 wine grape harvest, in full swing at the moment, should be completed earlier than the norm, which means the SA wines will be the first of the 2007 vintage to hit Europe for summer.

Compared to the five year average and to the original forecast, the crop now appears to be slightly smaller. A harvest estimate survey conducted in the various regions during the second week of February, shows that the harvest will be approximately 0.5 per cent smaller than the 2006 harvest, with the early white wine cultivars displaying the biggest decrease. The 2007 wine harvest should amount to 966 million litres.

The wine grape areas of the Western Cape experienced very favourable weather conditions for the greatest part of the season. Just before harvesting commenced a period of very hot weather was experienced, but was followed by very welcome widespread rains which had a cooling effect and allowed the vineyards to recover before the harvest started in earnest.

Vineyards on deep soils, those in the cooler regions and those with well managed leaf canopies were hardly affected by the heat and a normal harvest of good quality is expected from them. Vineyards on shallow and/or light coloured soils which normally have low water retention capacities, developed some water stress and were therefore somewhat negatively affected by the hot period.

A decrease in the stock level at producer and private cellars is expected. Estimates indicate a likely figure of 343,8 million litres on 31 December 2007, compared to 382,0 million litres on 31 December 2006.

WOSA (Wines of South Africa) is optimistic that both local and international trading conditions for our wine appear to be improving, and anticipates a far better year than in 2006.

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ESTIMATED 2007 GRAPE AND WINE CROP

DISTRICT	GRAPE CROP - TONS						ESTIMATE 21/08/2006	ESTIMATE 24/11/2006	ESTIMATE 10/01/2007	ESTIMATE 09/02/2007
	2000	2001	2002	2003	2004	2005	2006	2007		
ORANGE RIVER	128 285	83 436	173 420	144 697	206 193	161 549	190 170	185 000	187 000	165 000
<i>trend (%) on previous year</i>	111.1	65.0	207.8	83.4	142.5	78.3	117.7	97.3	98.3	86.8
OLIFANTS RIVER	173 126	159 902	165 603	205 150	178 590	181 445	201 189	207 000	204 000	199 177
<i>trend (%) on previous year</i>	93.8	92.4	103.6	123.9	87.1	101.6	110.9	102.9	101.4	99.0
MALMESBURY	91 193	80 689	80 026	109 118	103 947	98 663	114 873	117 250	117 250	111 388
<i>trend (%) on previous year</i>	111.6	88.5	99.2	136.4	95.3	94.9	116.4	102.1	102.1	97.0
LITTLE KAROO	41 458	36 500	42 020	42 301	44 522	37 220	36 954	41 500	41 500	40 575
<i>trend (%) on previous year</i>	76.2	88.0	115.1	100.7	105.3	83.6	99.3	112.3	112.3	109.8
PAARL	128 018	123 572	105 287	144 833	138 802	138 796	143 651	150 000	150 000	147 000
<i>trend (%) on previous year</i>	99.0	96.5	85.2	137.6	95.8	100.0	103.5	104.4	104.4	102.3
ROBERTSON	161 055	141 267	165 304	176 440	184 095	158 679	165 208	180 000	180 000	178 425
<i>trend (%) on previous year</i>	80.2	87.7	117.0	106.7	104.3	86.2	104.1	109.0	109.0	108.0
STELLENBOSCH	105 533	98 514	76 999	114 285	115 276	115 229	128 266	128 300	128 300	121 550
<i>trend (%) on previous year</i>	95.1	93.3	78.2	148.4	100.9	100.0	111.3	100.0	100.0	94.8
WORCESTER	269 502	253 581	271 216	296 865	340 759	280 051	318 128	326 000	327 000	328 500
<i>trend (%) on previous year</i>	90.9	94.1	107.0	109.5	114.8	82.2	113.6	102.5	102.8	103.3
TOTAL (INDUSTRY)	1 098 170	977 461	1 079 875	1 233 689	1 312 184	1 171 632	1 298 439	1 335 050	1 335 050	1 291 615
<i>trend (%) on previous year</i>	93.6	89.0	110.5	114.2	106.4	89.3	110.8	102.8	102.8	99.5
LITRES PER GROSS TON	762	764	772	775	774	773	762	771	771	771
WINE PRODUCTION MILLION GROSS LITRES	837.2	746.5	834.2	956.0	1 015.7	905.2	989.9	1 029.7	1 029.7	996.2

Based on estimates by the producer cellars (represents about 80% of the total grape harvest) and viticulturists
2007 Yield per ton based on five year average

HARVEST AND SALES ESTIMATES

WINE PRODUCED	Average % alc/vol 2006	Gross litres							Trend	
		2000	2001	2002	2003	2004	2005	Estimate		2007/ 2006
								2006	2007	
Wine		540.2	530.4	567.2	712.7	696.8	628.5	694.4	641.5	92.4
Rebate	11.47	24.8	8.1	26.8	50.5	85.4	82.9	81.8	105.2	128.6
Juice and concentrate for non-alc purposes	10.54	142.3	99.4	115.3	70.7	87.8	64.6	73.2	77.0	105.1
Distilling wine	9.77	129.9	108.5	124.8	122.2	145.8	129.2	140.5	172.5	122.8
Total		837.2	746.5	834.2	956.0	1 015.7	905.2	989.9	996.2	100.6

WINE MARKET REQUIREMENT	Gross litres							Trend	
	2000	2001	2002	2003	2004	2005	Estimate		2007/ 2006
							2006	2007	
Producer sales to wholesalers: Wine in bulk	325.6	368.8	395.1	362.9	416.1	419.1	403.4		
Grapes	38.1	50.4	43.9	66.3	67.8	67.5	71.8		
	363.6	419.2	439.0	429.2	483.8	486.6	475.2		
Direct producer sales (packaged wine) and exports	167.0	144.9	145.0	139.9	154.5	148.2	155.4		
Total	530.6	564.1	584.0	569.1	638.3	634.8	630.6	653.5	103.6
Wine imported in bulk by wholesalers*			26.4	41.9		15.4	11.3		
Total wine market requirement	530.6	564.1	610.4	611.0	638.3	650.2	641.9	653.5	101.8

* concentrate component included

WINE PRODUCTION AND SALES	Gross litres							Trend	
	2000	2001	2002	2003	2004	2005	Estimate		2007/ 2006
							2006	2007	
Total wine stock at private and producer cellars on 1 Jan							339.4	382.0	
Wine production	540.2	530.4	567.2	712.7	696.8	628.5	694.4	641.5	92.4
Natural wine and must for sweetening imported by private and producer cellars	-	-	4.6	6.8	2.0	3.7	7.0	2.0	28.4
Minus: Sales	530.6	564.1	584.0	569.1	638.3	634.8	630.6	653.5	103.6
Transfers (previous vintages)	23.5	4.1	4.7	3.2	6.2	5.4	6.2	6.2	100.0
Lees destroyed/shortages	13.1	13.1	15.2	13.3	22.0	17.7	22.0	22.0	100.0
Total wine stock at private and producer cellars on 31 Dec	290.5	242.3	209.3	336.8	363.7	339.4	382.0	343.8	90.0
Total wine stock at producer cellars on 31 Dec	210.6	158.7	130.0	233.8	248.5	221.1	248.9		
Total wine stock at private cellars on 31 Dec	79.9	83.7	79.3	103.0	115.2	118.3	133.1		

DISTILLING WINE MARKET REQUIREMENT	litres @ 10% alc/vol							Trend	
	2000	2001	2002	2003	2004	2005	Estimate		2007/ 2006
							2006	2007	
Ex industry	140.4	114.6	126.1	124.9	149.9	130.33	148.1	168.5	113.8
Ex import (current year)	-	-	23.0	61.0	16.0	24.3	31.1	24.6	79.0
Ex import (previous year)	-	-	-	-	-	30.0	10.0	-	
Ex pool	-	-	15.5	1.5	1.9	1.8	1.8	1.8	100.0
Total	140.4	114.6	164.6	187.4	167.8	186.4	191.0	194.9	102.0
Pool deliveries	11.0	4.2	1.4	1.5	1.9	1.8	1.8	1.8	100.0
Ex import (destined for following year's market requirement)					30.0	10.0			

DOMESTIC SALES AND EXPORTS OF NATURAL WINE

DOMESTIC SALES OF NATURAL WINE

GROSS LITRE

	1 MONTH		3 MONTHS				6 MONTHS				12 MONTHS				MARKET SHARE		
	DEC 2005	DEC 2006	OCT 2005	DEC 2005	OCT 2006	DEC 2006	TREND	JUL 2005	DEC 2005	JUL 2006	DEC 2006	TREND	JAN 2005	DEC 2005	JAN 2006	DEC 2006	
		TREND															
Wholesalers	17 396 234	19 853 004	45 831 344	54 301 153	114.12	118.48		86 534 805	98 018 275	113.27	113.27		163 520 774	175 611 315	107.39	56.11	
Cellars	3 150 886	3 106 038	8 813 885	9 733 028	98.58	110.43		16 139 598	17 551 363	108.75	108.75		30 570 890	32 915 419	107.67	10.52	
Producer Cellars	9 656 183	8 922 691	26 623 883	27 622 275	92.40	103.75		52 287 162	51 799 596	99.07	99.07		99 893 954	98 723 806	98.83	31.54	
SUB TOTAL	30 203 303	31 881 733	81 269 112	91 656 456	105.56	112.78		154 961 565	167 369 234	108.01	108.01		293 985 618	307 250 540	104.51	98.16	
Wine component of alc fruit bev	937 831	706 594	2 259 183	1 638 007	75.34	72.50		4 149 343	2 904 141	69.99	69.99		7 107 052	5 744 563	80.83	1.84	
TOTAL	31 141 134	32 588 327	83 528 295	93 294 463	104.65	111.69		159 110 908	170 273 375	107.02	107.02		301 092 670	312 995 103	103.95	100.00	

Included in these figures are the sales of locally bottled imported natural wine

EXPORT OF NATURAL WINE

GROSS LITRE

	1 MONTH		3 MONTHS				6 MONTHS				12 MONTHS				MARKET SHARE		
	DEC 2005	DEC 2006	OCT 2005	DEC 2005	OCT 2006	DEC 2006	TREND	JUL 2005	DEC 2005	JUL 2006	DEC 2006	TREND	JAN 2005	DEC 2005	JAN 2006	DEC 2006	
		TREND															
TOTAL	18 499 791	23 526 982	65 341 199	68 772 791	105.25	105.25		147 793 188	137 316 893	92.91	92.91		279 117 217	269 426 022	96.53	100.00	

DOMESTIC SALES AND EXPORT OF NATURAL WINE

GROSS LITRE

	1 MONTH		3 MONTHS				6 MONTHS				12 MONTHS				MARKET SHARE		
	DEC 2005	DEC 2006	OCT 2005	DEC 2005	OCT 2006	DEC 2006	TREND	JUL 2005	DEC 2005	JUL 2006	DEC 2006	TREND	JAN 2005	DEC 2005	JAN 2006	DEC 2006	
		TREND															
TOTAL	49 640 925	56 115 309	148 869 494	162 067 254	113.04	108.87		306 904 096	307 590 268	100.22	100.22		580 209 887	582 421 125	100.38	100.00	

SOURCE FOR EXPORT FIGURES: DEPARTMENT OF AGRICULTURE, DIRECTORATE FOOD SAFETY AND QUALITY ASSURANCE

PRICE RANGES IN WHICH WINE WERE SOLD IN BULK FOR THE PERIOD JANUARY–DECEMBER 2006

TYPE	PRICE RANGE R / HL OR C / ℓ	CONSTANTIA / DURBANVILLE STELLENBOSCH / GRABOUW		WORCESTER / LITTLE KAROO / ROBERTSON		PAARL / MALMESBURY		OLIFANTS RIVER / ORANGE RIVER		INDUSTRY		
		LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	2006 %	2005 %
Cabernet Sauvignon	100 - < 200	28 400	0.8			11 200	0.3			39 600	0.3	0.0
	200 - < 300	89 370	2.5	200 450	5.4	72 003	1.6			361 823	2.8	3.6
	300 - < 400	1 182 260	33.6	1 625 584	44.0	1 699 509	38.4	1 054 748	90.9	5 562 101	43.5	18.2
	400 - < 500	223 490	6.4	989 565	26.8	116 866	2.6			1 329 921	10.4	15.0
	500 - < 600	713 800	20.3	623 045	16.9	378 543	8.6	2 500	0.2	1 717 888	13.4	24.6
	600 - < 700	422 112	12.0	90 880	2.5	1 652 261	37.3	102 600	8.8	2 267 853	17.7	13.0
	700 - < 800	478 050	13.6	108 580	2.9	176 252	4.0			762 882	6.0	13.0
	800 - < 900	136 604	3.9	54 280	1.5	205 385	4.6			396 269	3.1	6.4
	900 - < 1000	99 645	2.8							99 645	0.8	3.5
	> 1000	143 916	4.1			112 800	2.5			256 716	2.0	2.7
TOTAL ℓ		3 517 647	100.0	3 692 384	100.0	4 424 819	100.0	1 159 848	100.0	12 794 698	100.0	100.0
AVE PRICE R / HL OR C / ℓ		534.85		409.15		521.47		339.36		476.23		557.12
Cabernet Franc	100 - < 200	4 400	2.8							4 400	1.2	
	200 - < 300			22 280	11.7					22 280	6.1	15.0
	300 - < 400	80 690	52.1	64 740	34.1	1 345	5.9			146 775	39.9	52.9
	400 - < 500	65 100	42.0	30 820	16.2	21 340	94.1			117 260	31.9	11.9
	500 - < 600	4 823	3.1	22 890	12.1					27 713	7.5	
	600 - < 700			19 400	10.2					19 400	5.3	15.1
	700 - < 800			29 820	15.7					29 820	8.1	5.1
	TOTAL ℓ		155 013	100.0	189 950	100.0	22 685	100.0			367 648	100.0
AVE PRICE R / HL OR C / ℓ		347.37		453.13		446.44				408.12		384.92
Ruby Cabernet	200 - < 300	74 720	35.2	1 470 030	31.9	31 680	6.0	65 900	5.3	1 642 330	24.9	21.3
	300 - < 400			793 800	17.2	89 320	17.0	736 160	59.2	1 619 280	24.6	26.8
	400 - < 500	83 340	39.2	990 891	21.5	287 479	54.7	207 580	16.7	1 569 290	23.8	17.3
	500 - < 600			1 271 466	27.6	116 939	22.3	234 660	18.9	1 623 065	24.6	27.4
	600 - < 700			80 950	1.8					80 950	1.2	6.9
	700 - < 800											0.0
	900 - < 1000	54 400	25.6							54 400	0.8	
	> 1000											0.2
TOTAL ℓ		212 460	100.0	4 607 137	100.0	525 418	100.0	1 244 300	100.0	6 589 315	100.0	100.0
AVE PRICE R / HL OR C / ℓ		474.11		390.74		428.08		374.63		393.36		411.45
Merlot	100 - < 200			360 020	7.2	2 565	0.2			362 585	4.1	
	200 - < 300			427 810	8.6	55 620	3.8	72 660	18.9	556 090	6.3	6.1
	300 - < 400	1 013 805	49.2	2 439 320	49.0	348 757	23.7	258 260	67.3	4 060 142	45.6	39.7
	400 - < 500	91 180	4.4	830 577	16.7	198 792	13.5	37 750	9.8	1 158 299	13.0	16.8
	500 - < 600	234 315	11.4	587 445	11.8	392 285	26.6			1 214 045	13.6	15.2
	600 - < 700	297 031	14.4	241 037	4.8	287 689	19.5	7 100	1.8	832 857	9.4	5.2
	700 - < 800	243 600	11.8	67 930	1.4	50 787	3.4			362 317	4.1	11.2
	800 - < 900	6 192	0.3	25 840	0.5	133 260	9.0			165 292	1.9	2.4
	900 - < 1000	173 479	8.4			660	0.0	8 220	2.1	182 359	2.0	2.7
	> 1000					2 643	0.2			2 643	0.0	0.6
TOTAL ℓ		2 059 602	100.0	4 979 979	100.0	1 473 058	100.0	383 990	100.0	8 896 629	100.0	100.0
AVE PRICE R / HL OR C / ℓ		493.00		375.09		527.13		345.55		426.29		470.02
Shiraz	< 100			10 912	0.1					10 912	0.1	
	100 - < 200	10 000	0.5			29 100	0.6			39 100	0.3	
	200 - < 300	250	0.0	989 030	13.0	53 190	1.1			1 042 470	6.8	3.3
	300 - < 400	436 130	19.7	3 059 574	40.4	728 956	15.7	813 427	87.7	5 038 087	32.8	29.5
	400 - < 500	391 760	17.7	1 589 072	21.0	660 420	14.2	19 980	2.2	2 661 232	17.3	20.5
	500 - < 600	473 870	21.4	1 148 980	15.2	542 633	11.7	50 700	5.5	2 216 183	14.4	11.5
	600 - < 700	173 094	7.8	562 257	7.4	1 085 940	23.4	43 250	4.7	1 864 541	12.1	9.6
	700 - < 800	524 720	23.7	157 910	2.1	216 232	4.7			898 862	5.8	10.9
	800 - < 900					1 074 525	23.1			1 074 525	7.0	9.6
	900 - < 1000	207 579	9.4							207 579	1.4	1.9
	> 1000			63 955	0.8	257 420	5.5			321 375	2.1	3.1
	TOTAL ℓ		2 217 403	100.0	7 581 690	100.0	4 648 416	100.0	927 357	100.0	15 374 866	100.0
AVE PRICE R / HL OR C / ℓ		563.19		427.01		617.93		369.08		500.88		539.11

TYPE	PRICE RANGE R / HL OR C / ℓ	CONSTANTIA / DURBANVILLE / STELLENBOSCH / GRABOUW		WORCESTER / LITTLE KAROO / ROBERTSON		PAARL / MALMESBURY		OLIFANTS RIVER / ORANGE RIVER		INDUSTRY			
		LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	2006 %	2005 %	
Pinotage	100 - < 200	29 300	1.3							29 300	0.2		
	200 - < 300	85 320	3.6	217 520	3.5	488 118	6.4	382 560	15.8	1 173 518	6.3	2.3	
	300 - < 400	747 356	31.9	4 395 331	71.4	3 507 624	45.8	1 438 040	59.4	10 088 351	54.3	50.7	
	400 - < 500	869 194	37.1	1 035 931	16.8	3 035 140	39.6	562 520	23.2	5 502 785	29.6	24.8	
	500 - < 600	166 307	7.1	435 719	7.1	516 782	6.7	12 450	0.5	1 131 258	6.1	9.6	
	600 - < 700	339 828	14.5	20 400	0.3	111 711	1.5	26 100	1.1	498 039	2.7	8.1	
	700 - < 800	15 758	0.7	51 120	0.8	3 000	0.0			69 878	0.4	1.4	
	800 - < 900												1.7
	900 - < 1000												0.5
	> 1000	89 740	3.8	2 309	0.0					92 049	0.5	0.9	
TOTAL ℓ	2 342 803	100.0	6 158 330	100.0	7 662 375	100.0	2 421 670	100.0	18 585 178	100.0	100.0		
AVE PRICE R / HL OR C / ℓ		446.67		360.88		388.41		337.41		379.99	430.96		
Pinot Noir	300 - < 400	3 000	100.0	23 160	80.2					26 160	60.7		
	400 - < 500					11 240	100.0			11 240	26.1	8.4	
	500 - < 600											14.6	
	600 - < 700			5 711	19.8					5 711	13.2	40.8	
	700 - < 800											29.3	
	> 1000											6.9	
TOTAL ℓ	3 000	100.0	28 871	100.0	11 240	100.0			43 111	100.0	100.0		
AVE PRICE R / HL OR C / ℓ		350.00		435.73		400.00				420.45	652.16		
Cinsaut	100 - < 200	83 500	17.4							83 500	1.3		
	200 - < 300			500 770	16.6	950 061	33.6			1 450 831	22.8	1.1	
	300 - < 400	395 730	82.6	1 454 357	48.2	1 055 948	37.3	24 200	100.0	2 930 235	46.1	54.4	
	400 - < 500			1 024 920	33.9	586 650	20.7			1 611 570	25.4	31.5	
	500 - < 600			40 320	1.3	239 012	8.4			279 332	4.4	12.6	
	600 - < 700											0.4	
	TOTAL ℓ	479 230	100.0	3 020 367	100.0	2 831 671	100.0	24 200	100.0	6 355 468	100.0	100.0	
AVE PRICE R / HL OR C / ℓ		298.39		352.85		352.47		399.00		348.75	395.71		
Other red and blends	< 200	431 785	21.9	35 408	0.2	230 735	2.9			697 928	1.8	0.1	
	200 - < 300	1 100 560	55.9	6 980 616	37.0	917 234	11.7	1 928 326	17.6	10 926 736	27.6	28.9	
	300 - < 400	351 390	17.8	5 569 544	29.5	3 431 882	43.8	8 255 218	75.3	17 608 034	44.4	31.6	
	400 - < 500	20 440	1.0	3 286 736	17.4	1 888 959	24.1	328 964	3.0	5 525 099	13.9	24.2	
	500 - < 700	40 000	2.0	2 891 151	15.3	915 772	11.7	451 200	4.1	4 298 123	10.8	7.0	
	> 700	25 480	1.3	118 029	0.6	457 209	5.8			600 718	1.5	8.2	
	TOTAL ℓ	1 969 655	100.0	18 881 484	100.0	7 841 791	100.0	10 963 708	100.0	39 656 638	100.0	100.0	
	AVE PRICE R / HL OR C / ℓ		258.53		362.82		414.86		354.10		365.52	391.25	
Chardonnay	< 250											0.4	
	250 - < 350	7 400	3.6	161 080	1.1	8 400	0.5	12 760	2.0	189 640	1.1	1.9	
	350 - < 450	3 400	1.7	2 509 239	16.6	60 171	3.4	479 460	76.1	3 052 270	17.2	9.4	
	450 - < 550	136 970	66.5	10 442 840	69.1	1309755	74.5	124 540	19.8	12 014 105	67.9	71.1	
	550 - < 650	48 190	23.4	1 868 911	12.4	372 418	21.2	13 000	2.1	2 302 519	13.0	15.9	
	> 650	10 002	4.9	124 766	0.8	7 034	0.4			141 802	0.8	1.3	
	TOTAL ℓ	205 962	100.0	15 106 836	100.0	1 757 778	100.0	629 760	100.0	17 700 336	100.0	100.0	
AVE PRICE R / HL OR C / ℓ		523.01		494.32		522.16		429.44		495.11	494.22		
Sauvignon Blanc	< 250					29 000	2.0	10 340	1.4	39 340	0.4	0.5	
	250 - < 350	132 057	14.6	98 830	1.4	62 830	4.4	5 240	0.7	298 957	3.0	2.5	
	350 - < 450			340 975	4.9	32 680	2.3	109 000	14.7	482 655	4.8	8.9	
	450 - < 550	239 990	26.5	3 616 084	52.2	187 269	13.0	593 700	80.1	4 637 043	46.3	55.6	
	550 - < 650	351 570	38.9	2 491 183	35.9	898 028	62.4	10 220	1.4	3 751 001	37.4	29.1	
	> 650	180 910	20.0	386 037	5.6	229 529	15.9	13 050	1.8	809 526	8.1	3.4	
	TOTAL ℓ	904 527	100.0	6 933 109	100.0	1 439 336	100.0	741 550	100.0	10 018 522	100.0	100.0	
AVE PRICE R / HL OR C / ℓ		622.12		543.64		569.97		449.37		547.53	522.11		

TYPE	PRICE RANGE R / HL OR C / ℓ	CONSTANTIA / DURBANVILLE / STELLENBOSCH / GRABOUW		WORCESTER / LITTLE KAROO / ROBERTSON		PAARL / MALMESBURY		OLIFANTS RIVER / ORANGE RIVER		INDUSTRY		
		LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	2006 %	2005 %
Chenin Blanc	150 - < 200					2 200	0.0			2 200	0.0	0.2
	200 - < 250			40 312	0.1	193 507	2.0	378 660	5.3	612 479	1.2	15.6
	250 - < 350	1 747 609	51.8	28 758 627	89.6	3 029 533	31.6	6 554 500	91.7	40 090 269	76.8	63.4
	> 350	1 625 890	48.2	3 298 980	10.3	6 355 487	66.3	217 340	3.0	11 497 697	22.0	20.8
	TOTAL ℓ	3 373 499	100.0	32 097 919	100.0	9 580 727	100.0	7 150 500	100.0	52 202 645	100.0	100.0
	AVE PRICE R / HL OR C / ℓ		333.89		304.60		386.30		273.82		317.27	304.43
Colombar	150 - < 200											0.3
	200 - < 250	3 500	0.5					427 150	5.3	430 650	1.6	25.7
	250 - < 350	639 530	94.4	14 409 189	86.1	700 360	100.0	7 585 240	94.4	23 334 319	89.2	68.3
	> 350	34 400	5.1	2 322 619	13.9			25 420	0.3	2 382 439	9.1	5.6
	TOTAL ℓ	677 430	100.0	16 731 808	100.0	700 360	100.0	8 037 810	100.0	26 147 408	100.0	100.0
	AVE PRICE R / HL OR C / ℓ		295.24		308.37		306.09		261.87		293.68	277.70
Riesling	200 - < 250											9.2
	250 - < 350	161 150	84.2	1 376 980	70.2	472 150	99.1			2 010 280	76.4	64.6
	> 350	30 300	15.8	585 860	29.8	4 506	0.9			620 666	23.6	26.2
	TOTAL ℓ	191 450	100.0	1 962 840	100.0	476 656	100.0			2 630 946	100.0	100.0
	AVE PRICE R / HL OR C / ℓ		300.01		326.13		323.68				323.79	313.12
Semillon	150 - < 200					585	0.2			585	0.0	
	200 - < 250					4 500	1.4			4 500	0.1	0.4
	250 - < 350	37 800	24.3	1 323 974	49.5	277 929	85.2	347 555	100.0	1 987 258	56.7	51.8
	> 350	117 960	75.7	1 350 389	50.5	43 300	13.3			1 511 649	43.1	47.9
	TOTAL ℓ	155 760	100.0	2 674 363	100.0	326 314	100.0	347 555	100.0	3 503 992	100.0	100.0
	AVE PRICE R / HL OR C / ℓ		350.63		347.02		330.86		280.00		339.03	332.64
Other white and blends	100 - < 125	28 000	1.2			16 740	0.1			44 740	0.0	0.0
	150 - < 200	64 740	2.7	167 380	0.2	48 010	0.4			280 130	0.2	1.0
	200 - < 250	242 240	10.3	3 843 893	5.3	486 747	3.6	20 753 150	30.2	25 326 030	16.1	45.1
	250 - < 350	1 579 319	67.0	62 108 635	85.3	11 952 534	87.9	47 237 179	68.7	122 877 667	78.0	50.1
	> 350	442 872	18.8	6 684 124	9.2	1 095 102	8.1	801 323	1.2	9 023 421	5.7	3.8
	TOTAL ℓ	2 357 171	100.0	72 804 032	100.0	13 599 133	100.0	68 791 652	100.0	157 551 988	100.0	100.0
AVE PRICE R / HL OR C / ℓ		303.43		288.04		296.31		254.62		274.39	254.85	
Fortified	150 - < 200	1 637	0.3	73 833	0.8	9 000	1.7	5 263	0.4	89 733	0.8	1.1
	200 - < 250			1 970	0.0					1 970	0.0	0.2
	250 - < 300			46 990	0.5					46 990	0.4	5.7
	300 - < 350	304 435	63.8	5 252 251	57.7	65 463	12.7	788 138	65.7	6 410 287	56.8	76.5
	> 350	171 418	35.9	3 725 384	40.9	442 901	85.6	406 915	33.9	4 746 618	42.0	16.5
	TOTAL ℓ	477 490	100.0	9 100 428	100.0	517 364	100.0	1 200 316	100.0	11 295 598	100.0	100.0
AVE PRICE R / HL OR C / ℓ		408.96		341.71		517.54		360.31		354.58	346.88	

All Varieties	AVE PRICE R / HL OR C / ℓ	423.44	341.20	408.66	276.43	338.42	338.35
All red varieties	AVE PRICE R / HL OR C / ℓ	463.07	379.58	455.93	352.91	406.02	440.49
All white varieties	AVE PRICE R / HL OR C / ℓ	359.04	328.46	356.72	259.98	310.51	297.57

Rebate Wine	CENT PER LITRE @ 10% ALC/VOL					210.09	206.79
Distilling wine	CENT PER LITRE @ 10% ALC/VOL					92.78	97.43

AVERAGE PRICES OF WINE SOLD IN BULK

TYPE	R / HL OR C / ℓ						
	JANUARY - DECEMBER						
	2000	2001	2002	2003	2004	2005	2006
CABERNET SAUVIGNON	794.39	802.07	822.51	798.53	687.74	557.12	476.23
TREND		100.97	102.55	97.08	86.13	81.01	85.48
CABERNET FRANC	719.23	736.48	702.26	736.52	650.08	384.92	408.12
TREND		102.40	95.35	104.88	88.26	59.21	106.03
MERLOT	771.05	766.49	764.74	728.95	619.63	470.02	426.29
TREND		99.41	99.77	95.32	85.00	75.85	90.70
PINOTAGE	764.33	725.92	681.43	635.85	510.18	430.96	379.99
TREND		94.97	93.87	93.31	80.24	84.47	88.17
RUBY CABERNET	591.01	609.38	614.44	617.91	542.65	411.45	393.36
TREND		103.11	100.83	100.56	87.82	75.82	95.60
SHIRAZ	802.80	781.67	748.04	756.52	635.30	539.11	500.88
TREND		97.37	95.70	101.13	83.98	84.86	92.91
CINSAUT	408.51	431.71	484.44	537.18	482.80	395.71	348.75
TREND		105.68	112.21	110.89	89.88	81.96	88.13
PINOT NOIR	707.26	661.06	631.24	740.05	896.91	652.16	420.45
TREND		93.47	95.49	117.24	121.20	72.71	64.47
CHARDONNAY	306.77	327.59	396.06	470.17	485.06	494.22	495.11
TREND		106.79	120.90	118.71	103.17	101.89	100.18
SAUVIGNON BLANC	339.81	316.95	409.20	481.06	497.24	522.11	547.53
TREND		93.27	129.11	117.56	103.36	105.00	104.87
COLOMBAR	145.71	143.17	203.17	273.69	264.20	277.70	293.68
TREND		98.26	141.91	134.71	96.53	105.11	105.75
RIESLING	160.05	151.38	203.81	281.41	281.96	313.12	323.79
TREND		94.58	134.63	138.07	100.20	111.05	103.41
SEMILLON	190.19	199.88	240.91	330.08	336.02	332.64	339.03
TREND		105.09	120.53	137.01	101.80	98.99	101.92
CHENIN BLANC	165.57	157.16	215.27	302.90	290.08	304.43	317.27
TREND		94.92	136.98	140.71	95.77	104.95	104.22
ALL VARIETIES	212.03	229.23	299.36	378.06	354.16	338.35	338.42
TREND		108.11	130.59	126.29	93.68	95.54	100.02
ALL RED VARIETIES	603.56	607.60	624.66	642.56	547.28	440.49	406.02
TREND		100.67	102.81	102.87	85.17	80.49	92.17
ALL WHITE VARIETIES	145.67	155.88	216.25	291.69	287.97	297.57	310.51
TREND		107.01	138.73	134.89	98.72	103.33	104.35

AVERAGE BULK WINE PRICE REVIEW

Bulk prices: 2002-2006

- Red varieties were priced much higher than white varieties, the lowest industry average price for reds were R406.02 per hectolitre (in 2006) and the highest industry average price for whites were R310.51 per hectolitre (in 2006).
- Throughout the review period red varieties showed a decreasing trend with an annual average growth rate of -10.2%, while white varieties experienced an increasing trend with an annual average growth rate of +9.5%.
- From 2002 to 2003 the average price of both red and white varieties increased by 2.9% and 34.9%, respectively.
- The Olifants River / Orange River district experienced the lowest average prices for both red and white varieties for the entire review period.
- The Constantia / Durbanville / Stellenbosch / Grabouw district maintained the highest average prices for white varieties throughout the review period and every second year for red varieties.

Chardonnay

- From 2002 to 2006 Chardonnay's industry average price increased by an average rate of 5.7% each year.
- The Paarl / Malmesbury district was the only district that showed a constant year-on-year increase of 6%.
- However, the Constantia / Durbanville / Stellenbosch / Grabouw district, with the exception of 2005, maintained the highest average price over the review period.

Sauvignon Blanc

- Sauvignon Blanc was the highest priced white variety among Chardonnay, Chenin Blanc, Colombar, Riesling and Semillon.
- It also showed the biggest variation in price, among the above-mentioned varieties, over the various districts; the Olifants River / Orange River district had an average price of R449.37 per hectolitre and the Constantia / Durbanville / Stellenbosch / Grabouw district an average price of R622.12 per hectolitre in 2006.
- The annual average growth rate was +7.6% for the review period.
- The Worcester / Little Karoo / Robertson district's average price was in line with that of the industry average price throughout the review period.
- The Constantia / Durbanville / Stellenbosch / Grabouw district's average price increased by an annual average rate of 4.7% from 2002 to 2005, and then increased substantially by 10.7% from 2005 to 2006.
- The only deviations from this increasing trend in the average price of Sauvignon Blanc, was a 1.1% decrease in the Paarl / Malmesbury district from 2004 to 2005 and a 2% decrease in the Olifants River / Orange River district from 2005 to 2006.

Chenin Blanc

- After a huge increase in 2003, the average price in all the districts except for the Constantia / Durbanville / Stellenbosch / Grabouw district, then experienced a decrease in 2004.
- The Constantia / Durbanville / Stellenbosch / Grabouw district maintained a constant average annual increase of 10.1% throughout the review period.
- The Paarl / Malmesbury district holds the highest price for Chenin Blanc throughout the review period, reaching a peak of R386.30 per hectolitre in 2006.
- The annual average growth rate was +10.2% from 2002 to 2006.

Cabernet Sauvignon

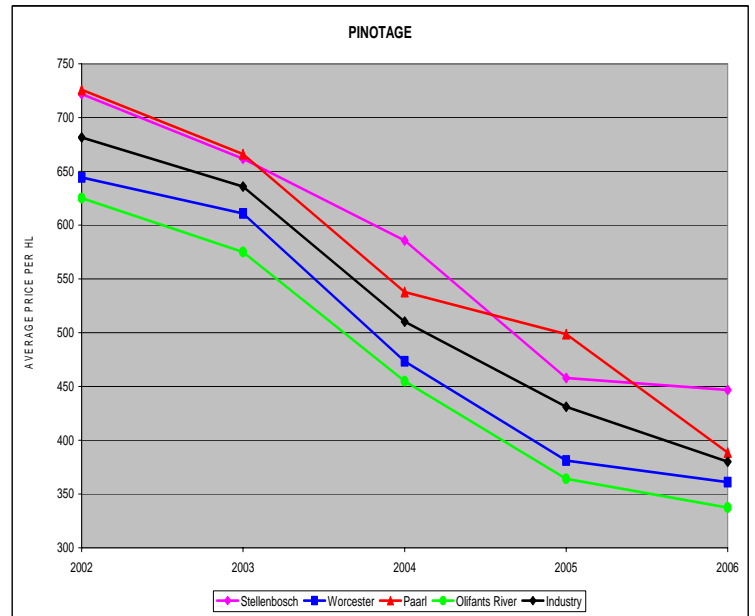
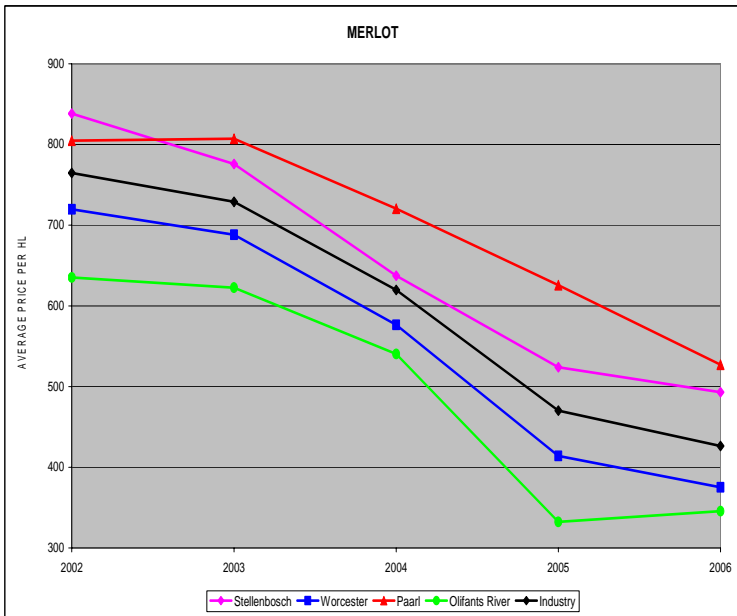
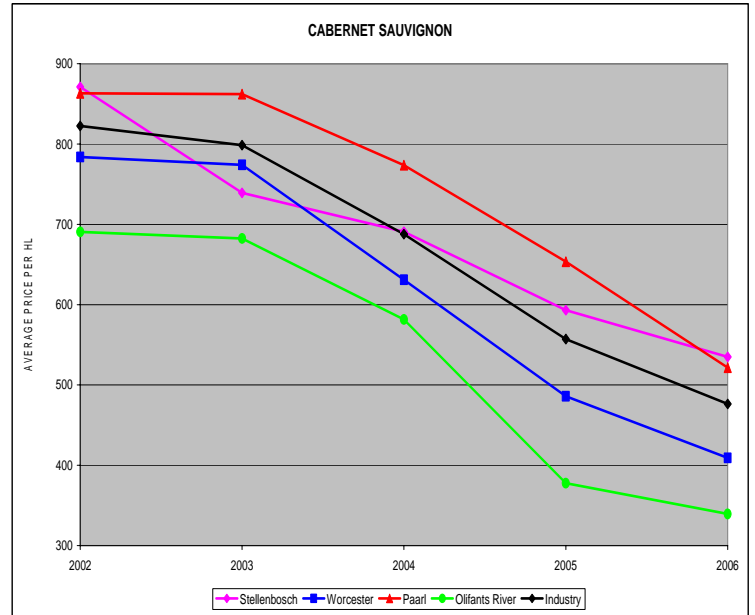
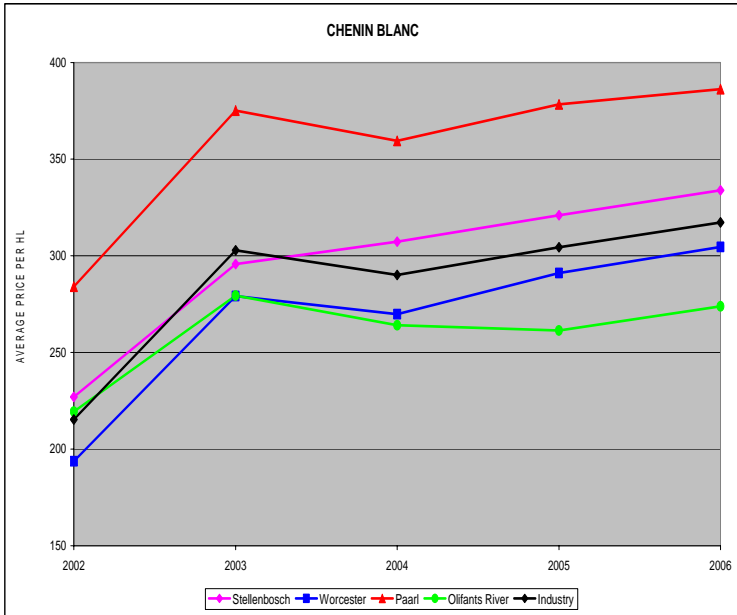
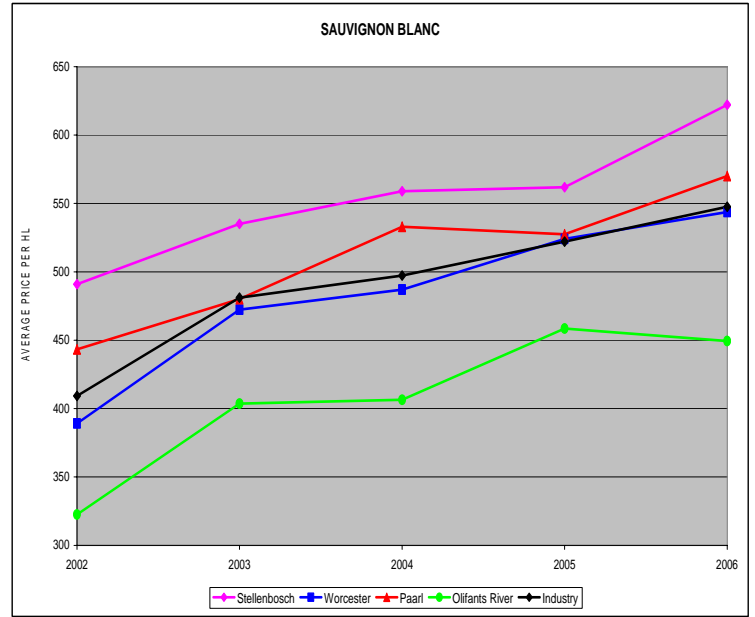
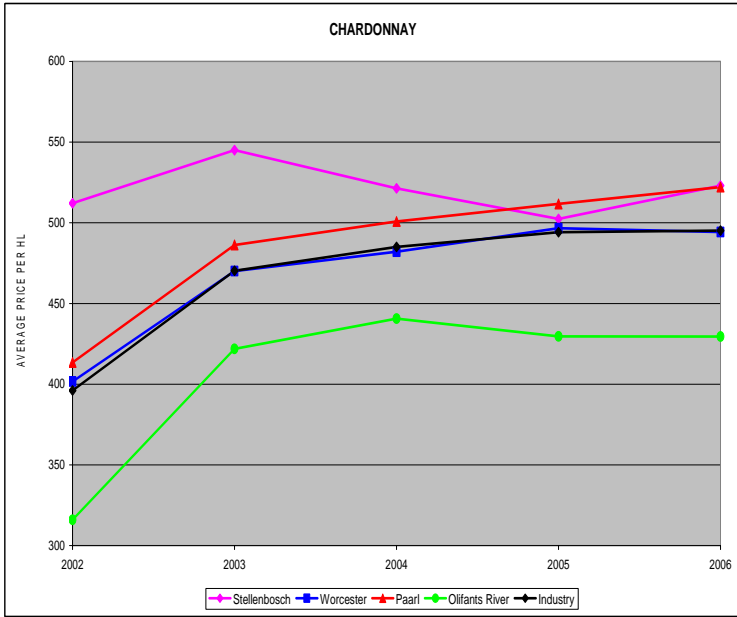
- Average prices decreased over all districts for the entire review period.
- The biggest decrease in Cabernet Sauvignon's average price of 35.03% occurred in the Olifants River / Orange River district in 2005.
- The annual average growth rate was -12.8% from 2002 to 2006.
- Cabernet Sauvignon was the highest priced red variety amongst Merlot, Pinotage and Shiraz.

Merlot

- Merlot's average price only increased twice throughout the review period. For 2003 in the Paarl / Malmesbury district by 0.3% and for 2006 in the Olifants River / Orange River district by 4%, whereas the Constantia / Durbanville / Stellenbosch / Grabouw district and the Worcester / Little Karoo / Robertson district showed a decrease of 12.4% and 15% respectively, over the review period.
- From 2004 to 2005 Merlot's average price experienced its biggest decrease of 24.15%.
- The annual average growth rate was -13.6% over the review period.

Pinotage

- Pinotage's trend is similar to that of Merlot.
- All districts showed a decreasing trend in average prices for the entire review period.
- The annual average growth rate was -13.6% from 2002 to 2006, the same as Merlot.
- Pinotage had the lowest industry average price compared to Cabernet Sauvignon, Merlot and Shiraz.



RSA EXPORTS: WINE AND FLAVOURED GRAPE LIQUOR

PRODUCT		JANUARY			6 MONTHS			12 MONTHS			Litres
		2006	2007	Trend	AUG '05 - JAN '06	AUG '06 - JAN '07	Trend	FEB '05 - JAN '06	FEB '06 - JAN '07	Trend	
Chardonnay	P	666 969	1 189 477	178.34	5 834 455	7 319 461	125.45	13 270 475	14 695 170	110.74	
	B	222 458	489 179	219.90	1 606 464	1 928 167	120.03	3 897 826	4 124 700	105.82	
Sauvignon Blanc	P	436 468	772 558	177.00	5 441 017	6 398 872	117.60	12 472 043	12 392 742	99.36	
	B	271 694	196 800	72.43	1 108 334	1 122 631	101.29	2 734 365	2 269 880	83.01	
Chenin Blanc	P	618 592	807 403	130.52	7 100 334	6 555 250	92.32	18 534 218	15 358 249	82.86	
	B	895 766	1 514 107	169.03	7 699 757	9 511 652	123.53	16 337 445	20 340 086	124.50	
Other White	P	2 226 696	2 180 401	97.92	20 740 669	16 480 623	79.46	39 982 686	34 157 053	85.43	
	B	1 127 785	1 045 910	92.74	11 269 078	6 775 603	60.13	21 915 456	14 225 680	64.91	
TOTALS WHITE WINE	P	3 948 725	4 949 839	125.35	39 116 475	36 754 206	93.96	84 259 422	76 603 214	90.91	
	B	2 517 703	3 245 996	128.93	21 683 633	19 338 053	89.18	44 885 092	40 960 346	91.26	
	P+B	6 466 428	8 195 835	126.74	60 800 108	56 092 259	92.26	129 144 514	117 563 560	91.03	
Cabernet Sauvignon	P	710 504	1 105 371	155.58	5 175 919	6 232 607	120.42	11 235 293	12 545 102	111.66	
	B	50 450	425 573	843.55	768 335	1 802 802	234.64	2 295 275	3 195 475	139.22	
Shiraz	P	574 889	1 208 189	210.16	4 378 742	6 988 986	159.61	9 679 976	11 717 828	121.05	
	B	550 550	48 860	8.87	987 713	510 600	51.70	1 723 423	1 213 598	70.42	
Pinotage	P	347 288	687 740	198.03	4 394 935	3 966 692	90.26	10 129 132	8 145 404	80.42	
	B	176 610	829 068	469.43	2 579 548	4 222 177	163.68	5 613 625	6 827 657	121.63	
Merlot	P	258 307	505 178	195.57	2 733 334	3 782 981	138.40	5 611 983	7 303 633	130.14	
	B	172 867	193 520	111.95	1 314 725	951 573	72.38	2 178 215	1 506 373	69.16	
Other Red	P	4 257 913	3 188 786	74.89	30 145 456	27 049 972	89.73	60 513 300	54 381 334	89.87	
	B	2 455 004	2 576 343	104.94	15 651 004	16 739 186	106.95	29 829 031	31 331 547	105.04	
TOTALS RED WINE	P	6 148 901	6 695 264	108.89	46 828 386	48 021 238	102.55	97 169 684	94 093 301	96.83	
	B	3 405 481	4 073 364	119.61	21 301 325	24 226 338	113.73	41 639 569	44 074 650	105.85	
	P+B	9 554 382	10 768 628	112.71	68 129 711	72 247 576	106.04	138 809 253	138 167 951	99.54	
Blanc de Noir + Rosé	P	219 393	378 017	172.30	2 464 810	2 386 477	96.82	7 710 160	7 235 853	93.85	
	B	304 670	343 096	112.61	2 071 700	2 362 228	114.02	5 795 157	9 304 093	160.55	
	P+B	524 063	721 113	137.60	4 536 510	4 748 705	104.68	13 505 317	16 539 946	122.47	
TOTALS NATURAL WINE	P	10 317 019	12 023 120	116.54	88 409 671	87 161 921	98.59	189 139 266	177 932 368	94.07	
	B	6 227 854	7 662 456	123.04	45 056 658	45 926 619	101.93	92 319 818	94 339 089	102.19	
	P+B	16 544 873	19 685 576	118.98	133 466 329	133 088 540	99.72	281 459 084	272 271 457	96.74	
Fortified Wine	P	33 705	43 583	129.31	156 459	305 892	195.51	330 999	462 971	139.87	
	B	0	0	-	48 299	33 454	69.26	81 015	33 454	41.29	
	P+B	33 705	43 583	129.31	204 758	339 346	165.73	412 014	496 425	120.49	
Sparkling wine	P	61 620	49 548	80.41	933 444	1 404 000	150.41	1 516 802	2 006 139	132.26	
TOTALS ALL WINE	P	10 412 344	12 116 251	116.36	89 499 574	88 871 813	99.30	190 987 067	180 401 478	94.46	
	B	6 227 854	7 662 456	123.04	45 104 957	45 960 073	101.90	92 400 833	94 372 543	102.13	
	P+B	16 640 198	19 778 707	118.86	134 604 531	134 831 886	100.17	283 387 900	274 774 021	96.96	
OTHER(e.g. for vinegar, industrial)	P	0	0	-	0	0	-	0	0	-	
	B	0	0	-	0	0	-	0	0	-	
	P+B	0	0	-	0	0	-	0	0	-	
Flavoured Grape Liquor	P	0	12 240	-	480	12 313	2565.21	10 471	19 093	182.34	
TOTALS ALL PRODUCTS	P	10 412 344	12 128 491	116.48	89 500 054	88 884 126	99.31	190 997 538	180 420 571	94.46	
	B	6 227 854	7 662 456	123.04	45 104 957	45 960 073	101.90	92 400 833	94 372 543	102.13	
	P+B	16 640 198	19 790 947	118.93	134 605 011	134 844 199	100.18	283 398 371	274 793 114	96.96	

P=Packaged

B=Bulk

SOURCE: DEPARTMENT OF AGRICULTURE, DIRECTORATE FOOD SAFETY AND QUALITY ASSURANCE

RSA WINE EXPORTS PER COUNTRY (PACKAGED AND BULK)

PACKAGED AND BULK NATURAL WINE EXPORTS (Litres) PER COUNTRY FOR THE PERIOD FEBRUARY - JANUARY

COUNTRY	200502 - 200601				200602 - 200701				Trend 200602 - 200701 / 200502 - 200601			
	White	Red	BLANC DE NOIR / ROSÉ	Total	White	Red	BLANC DE NOIR / ROSÉ	Total	White	Red	BLANC DE NOIR / ROSÉ	Total
UNITED KINGDOM	54 424 271	39 536 365	2 592 424	96 553 060	45 301 813	33 839 548	2 966 862	82 108 223	83	86	114	85
GERMANY	10 172 356	23 187 495	2 514 341	35 874 192	14 445 868	25 014 150	5 347 805	44 807 823	142	108	213	125
THE NETHERLANDS	16 448 346	24 921 049	6 125 229	47 494 624	12 412 644	18 936 088	5 111 029	36 459 761	75	76	83	77
SWEDEN	9 620 031	10 536 026	5 769	20 161 826	10 481 854	12 641 744	74 151	23 197 749	109	120	1 285	115
DENMARK	2 523 905	7 329 550	3 632	9 857 087	3 170 461	8 933 992	13 289	12 117 742	126	122	366	123
CANADA	6 302 179	7 340 544	57 749	13 700 472	3 565 256	7 506 461	71 289	11 143 006	57	102	123	81
UNITED STATES OF AMERICA	4 331 494	5 766 310	136 769	10 234 573	4 425 222	6 227 468	138 753	10 791 443	102	108	101	105
BELGIUM	4 230 004	3 610 578	465 483	8 306 065	4 687 451	3 958 409	661 086	9 306 946	111	110	142	112
FRANCE	2 396 130	2 428 433	879 826	5 704 389	2 962 331	4 230 533	1 222 107	8 414 971	124	174	139	148
REPUBLIC OF IRELAND	2 659 001	2 301 203	27 774	4 987 978	2 781 557	2 358 603	41 243	5 181 403	105	102	148	104
FINLAND	3 052 709	1 236 613	288	4 289 610	2 267 408	1 356 660	3 105	3 627 173	74	110	1 078	85
SWITZERLAND	1 216 999	1 381 834	344 755	2 943 588	1 496 108	1 431 763	343 042	3 270 913	123	104	100	111
KENYA	711 925	732 093	23 292	1 467 310	978 965	916 345	22 770	1 918 080	138	125	98	131
NEW ZEALAND	5 533 890	63 140	2 790	5 599 820	1 829 391	7 232	2 493	1 839 116	33	11	89	33
NORWAY	327 233	1 873 963	140	2 201 336	245 512	1 292 150	72	1 537 734	75	69	51	70
RUSSIA	197 243	372 633	2 160	572 036	453 513	844 443	5 895	1 303 851	230	227	273	228
JAPAN	619 506	851 159	2 007	1 472 672	494 927	770 968	0	1 265 895	80	91	0	86
MAURITIUS *	194 033	212 786	105 370	512 189	448 608	400 934	172 314	1 021 856	231	188	164	200
LATVIA	257 313	434 189	1 562	693 064	359 448	620 787	1 350	981 585	140	143	86	142
TANZANIA	478 506	358 309	9 176	845 991	562 197	382 704	10 647	955 548	117	107	116	113
UNITED ARAB EMIRATES	394 142	346 268	11 472	751 882	376 177	314 530	18 300	709 007	95	91	160	94
POLAND	120 552	406 342	17 235	544 129	143 986	486 925	23 624	654 535	119	120	137	120
NIGERIA *	10 575	24 750	0	35 325	106 832	537 926	2 700	647 458	1 010	2 173	0	1 833
CHINA	42 479	183 231	0	225 710	91 581	479 256	12 830	583 667	216	262	0	259
AUSTRALIA	127 206	174 846	29 741	331 793	169 577	155 425	18 831	343 833	133	89	63	104
OTHER COUNTRIES	2 752 486	3 199 545	146 333	6 098 364	3 304 873	4 522 906	254 359	8 082 138	120	141	174	133
TOTAL	129 144 514	138 809 254	13 505 317	281 459 085	117 563 560	138 167 950	16 539 946	272 271 456	91	100	122	97

PACKAGED NATURAL WINE EXPORTS (Litres) PER COUNTRY FOR THE PERIOD FEBRUARY - JANUARY

COUNTRY	200502 - 200601				200602 - 200701				Trend 200602 - 200701 / 200502 - 200601			
	White	Red	BLANC DE NOIR / ROSÉ	Total	White	Red	BLANC DE NOIR / ROSÉ	Total	White	Red	BLANC DE NOIR / ROSÉ	Total
UNITED KINGDOM	38 326 282	31 309 484	2 270 577	71 906 343	31 686 136	27 907 329	2 766 767	62 360 232	83	89	122	87
SWEDEN	9 620 031	10 536 026	5 769	20 161 826	10 481 854	12 641 744	74 151	23 197 749	109	120	1 285	115
THE NETHERLANDS	10 528 181	15 532 989	3 099 978	29 161 148	7 760 641	9 838 569	2 515 581	20 114 791	74	63	81	69
GERMANY	3 498 421	10 394 353	1 621 811	15 514 585	3 505 144	10 032 913	858 710	14 396 767	100	97	53	93
UNITED STATES OF AMERICA	4 331 494	5 766 310	136 769	10 234 573	4 089 862	5 481 578	138 753	9 710 193	94	95	101	95
DENMARK	1 561 435	5 011 970	3 632	6 577 037	1 989 351	6 603 465	13 289	8 606 105	127	132	366	131
CANADA	2 794 398	3 942 302	57 749	6 794 449	2 556 551	4 303 327	71 289	6 931 167	91	109	123	102
REPUBLIC OF IRELAND	2 659 001	2 301 203	27 774	4 987 978	2 734 267	2 358 603	41 243	5 134 113	103	102	148	103
BELGIUM	2 388 650	1 961 752	222 134	4 572 536	2 404 140	2 345 548	269 432	5 019 120	101	120	121	110
FINLAND	2 310 007	1 058 193	288	3 368 488	1 689 218	1 187 360	3 105	2 879 683	73	112	1 078	85
KENYA	711 925	732 093	23 292	1 467 310	978 965	916 345	22 770	1 918 080	138	125	98	131
NORWAY	327 233	1 587 563	140	1 914 936	245 512	1 048 423	72	1 294 007	75	66	51	68
RUSSIA	197 243	372 633	2 160	572 036	429 513	771 604	5 895	1 207 012	218	207	273	211
SWITZERLAND	346 661	661 988	9 495	1 018 124	499 454	598 406	59 342	1 157 202	144	90	625	114
JAPAN	388 446	851 159	2 007	1 241 612	353 527	750 488	0	1 103 995	91	88	0	89
LATVIA	257 313	434 189	1 562	693 064	359 448	620 787	1 350	981 585	140	143	86	142
TANZANIA	478 506	358 309	9 176	845 991	562 197	382 704	10 647	955 548	117	107	116	113
UNITED ARAB EMIRATES	394 142	346 268	11 472	751 882	376 177	314 530	18 300	709 007	95	91	160	94
NIGERIA *	10 575	24 750	0	35 325	106 832	537 926	2 700	647 458	1 010	2 173	0	1 833
POLAND	120 552	335 196	17 235	472 983	143 986	390 355	23 624	557 965	119	116	137	118
MAURITIUS *	31 803	24 946	2 970	59 719	226 808	182 044	78 864	487 716	713	730	2 655	817
FRANCE	212 903	198 887	5 306	417 096	235 519	214 934	8 636	459 089	111	108	163	110
CHINA	42 479	135 411	0	177 890	67 581	314 756	1 350	383 687	159	232	0	216
SOUTH KOREA	510 090	54 028	495	564 613	337 061	41 002	0	378 063	66	76	0	67
AUSTRALIA	127 206	174 846	29 741	331 793	146 077	155 425	18 831	320 303	115	89	63	97
OTHER COUNTRIES	2 084 445	3 062 857	148 628	5 295 930	2 637 423	4 153 155	231 152	7 021 730	127	136	156	133
TOTAL	84 259 422	97 169 685	7 710 160	189 139 267	76 603 214	94 093 300	7 235 853	177 932 367	91	97	94	94

BULK NATURAL WINE EXPORTS (Litres) PER COUNTRY FOR THE PERIOD FEBRUARY - JANUARY

COUNTRY	200502 - 200601				200602 - 200701				Trend 200602 - 200701 / 200502 - 200601			
	White	Red	BLANC DE NOIR / ROSÉ	Total	White	Red	BLANC DE NOIR / ROSÉ	Total	White	Red	BLANC DE NOIR / ROSÉ	Total
GERMANY	6 673 935	12 793 142	892 530	20 359 607	10 940 724	14 981 237	4 489 095	30 411 056	164	117	503	149
UNITED KINGDOM	16 097 989	8 226 881	321 847	24 646 717	13 615 677	5 932 219	200 095	19 747 991	85	72	62	80
THE NETHERLANDS	5 920 166	9 388 060	3 025 251	18 333 477	4 652 003	9 097 520	2 595 448	16 344 971	79	97	86	89
FRANCE	2 183 227	2 229 546	874 520	5 287 293	2 726 812	4 015 599	1 213 471	7 955 882	125	180	139	150
BELGIUM	1 841 354	1 648 826	243 349	3 733 529	2 283 311	1 612 861	391 654	4 287 826	124	98	161	115
CANADA	3 507 781	3 398 242	0	6 906 023	1 008 705	3 203 134	0	4 211 839	29	94	0	61
DENMARK	962 470	2 317 580	0	3 280 050	1 181 110	2 330 527	0	3 511 637	123	101	0	107
SWITZERLAND	870 338	719 866	335 260	1 925 464	996 654	833 357	283 700	2 113 711	115	116	85	110
NEW ZEALAND	5 523 760	0	0	5 523 760	1 824 840	0	0	1 824 840	33	0	0	33
UNITED STATES OF AMERICA	0	0	0	0	335 360	745 890	0	1 081 250	0	0	0	0
FINLAND	742 702	178 420	0	921 122	578 190	169 300	0	747 490	78	95	0	81
MAURITIUS	162 230	187 840	102 400	452 470	221 800	218 890	93 450	534 140	137	117	91	118
ITALY	142 340	0	0	142 340	168 300	72 740	25 700	266 740	118	0	0	187
NORWAY	0	286 400	0	286 400	0	243 727	0	243 727	0	85	0	85
INDIA	0	71 800	0	71 800	94 420	119 200	0	213 620	0	166	0	298
CHINA	0	47 820	0	47 820	24 000	164 500	11 480	199 980	0	344	0	418
JAPAN	231 060	0	0	231 060	141 400	20 500	0	161 900	61	0	0	70
CZECH REPUBLIC	25 740	74 000	0	99 740	24 000	120 040	0	144 040	93	162	0	144
RUSSIA	0	0	0	0	24 000	72 839	0	96 839	0	0	0	0
POLAND	0	71 146	0	71 146	0	96 570	0	96 570	0	136	0	136
AUSTRIA	0	0	0	0	48 220	0	0	48 220	0	0	0	0
REPUBLIC OF IRELAND	0	0	0	0	47 290	0	0	47 290	0	0	0	0
TAIWAN	0	0	0	0	0	24 000	0	24 000	0	0	0	0
AUSTRALIA	0	0	0	0	23 530	0	0	23 530	0	0	0	0
OTHER COUNTRIES	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	44 885 092	41 639 569	5 795 157	92 319 818	40 960 346	44 074 650	9 304 093	94 339 089	91	106	161	102

* As from 1 July 2006 all packaged exports to previously exempted African countries and surrounding islands are reflected in full
SOURCE: DEPARTMENT OF AGRICULTURE, DIRECTORATE FOOD HEALTH AND QUALITY INSURANCE

OVERVIEW OF EXPORT MARKETS

Exports

The UK remains South Africa's most prominent market with regards to wine exports; in 2006 32.2% of total RSA wine exports were destined for the UK market. The recent drop of 15% in UK sales has coincided with a 3.6% drop in South African wine exports and has caused much concern. Here we turn our focus to markets outside the UK, those markets that could potentially have big influences on South African wine exports.

Less prominent markets that have shown remarkable growth from 2002 to 2006:

In 2002 a mere 4 230 litres of South African wines were exported to Nigeria, in 2006 this figure was an impressive 660 271 litres. Nigeria has experienced remarkable growth, particularly in 2006. Increasing the amount of South African wine imports by 3 920% from 2005 to 2006 and claiming 0.24% of total South African wine exports in 2006. Cabernet Sauvignon is by far the most popular of the main varieties and in 2006 it represented 36% of South African wine exports to Nigeria.

The Angolan market went from virtually non-existent to claiming an impressive 0.3% of total South African wine exports. Wine exports to Angola experienced phenomenal growth of 25 084% from 2005 to 2006. Angolan consumers also prefer Cabernet Sauvignon to the other main varieties.

In 2006, 0.35% of total RSA wine exports were sent to Latvia. The Latvian market has shown substantial growth from 2002 to 2006, achieving an average growth rate of 70% per annum. Red varieties have become increasingly popular over the past five years. Pinotage accounted for 9% of South African wine exports to Latvia in 2006, showing an increase of 299% on the 2005 figure. On the other hand Chenin Blanc showed a decrease of 79% from 2005 to 2006.

Mauritius has experienced equally impressive, sustained growth over the past five years, achieving an annual average growth rate of 233%. Mauritian consumers prefer the white varieties, in particular Chardonnay. Chenin Blanc has shown sustained growth over the last three years, but a sudden growth spurt in Sauvignon Blanc volumes (439% increase from 2005 to 2006) has made it, together with Chardonnay, the most popular wines in 2006.

The BRIC countries

Currently there is a buzz surrounding the BRIC countries (Brazil, Russia, India and China). We now take a closer look at the performance of South African wines within these countries.

Brazil:

The share of South African wine exports to Brazil has been small, reaching a peak in 2004 of 0.13% of total RSA wine exports. A closer look at the performance of South African wines, reveals that the Brazilian consumer favour South African red varieties. The most predominant variety being Pinotage, which represented 18.7% of RSA wine exports to Brazil in 2006. All the main varieties decreased in 2005 and then increased again in 2006, despite the fact that total wine exports to Brazil decreased by 21% from 2005 to 2006. This indicates an increase in the popularity of the main varieties (Chardonnay, Chenin Blanc, Sauvignon Blanc, Cabernet Sauvignon, Merlot, Pinotage and Shiraz). Pinotage increased by an overall 661% and Shiraz by 379% over the review period.

Russia:

Russia is the BRIC country in which South African wines have performed the best. Russia showed substantial growth from 2005 to 2006 (120%) and claimed 0.46% of total RSA wine exports in 2006. Pinotage and Shiraz have become increasingly popular within the Russian market. Pinotage experienced annual average growth of 99% and Shiraz of 100% from 2002 to 2006. Chenin Blanc has also become a favourite over this period, with an average growth rate of 67% per year.

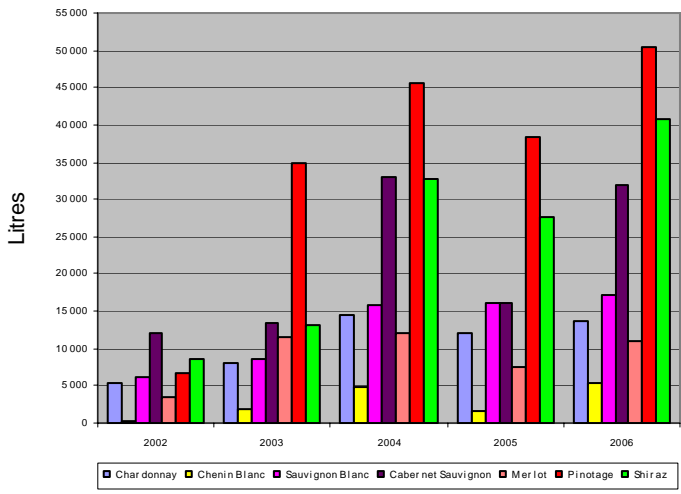
India:

It is estimated that wine consumption in India is growing at about 30% per year. However, exports to India have been minor over the past 5 years, reaching its highest point in 2006 at 0.03% of total RSA wine exports. This can be attributed to India's extremely high basic tariffs on imported wine which starts at 150%. Although exports to India have been minute, it has surprisingly emerged as the biggest market (within the BRIC countries) for Merlot in 2006. From 2002 to 2006 Merlot showed phenomenal overall growth of 10 783%.

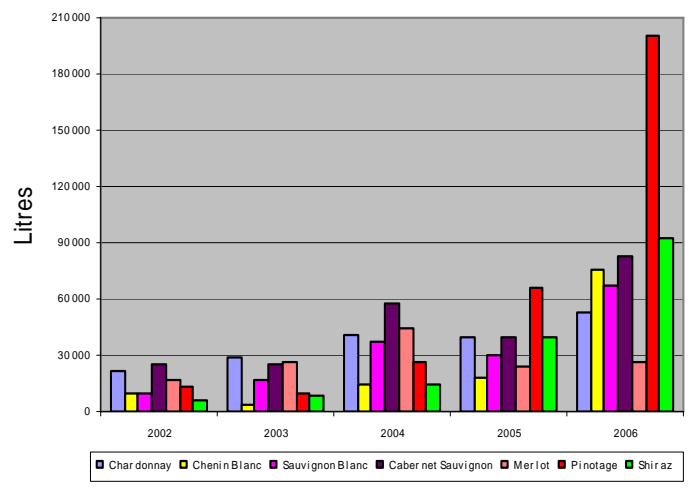
China:

Exports to China have been relatively small over the review period, but the market has shown much potential. The Chinese market experienced a growth spurt in 2006, increasing its share of total South African wine exports from 0.08% in 2005 to 0.18% in 2006. Chinese consumers also favour South African red varieties, in particular Shiraz. Shiraz achieved remarkable overall growth of 4 080% from 2002 to 2006. Other varieties that showed substantial growth over the review period were: Chardonnay which increased by 1 898%, Sauvignon Blanc by 343% and Pinotage by 549%.

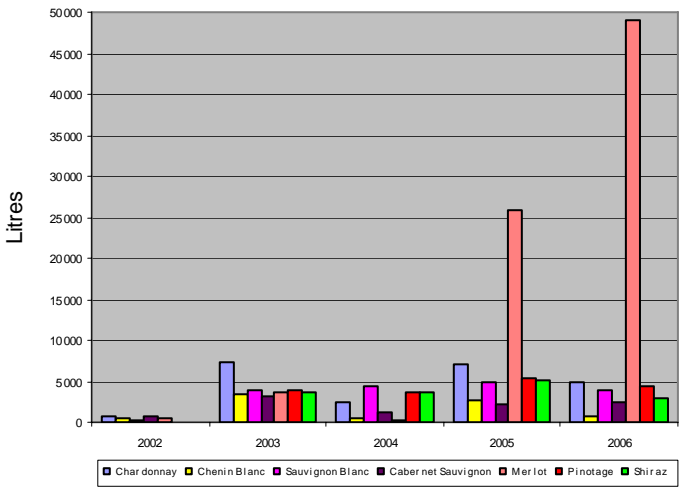
Brazil



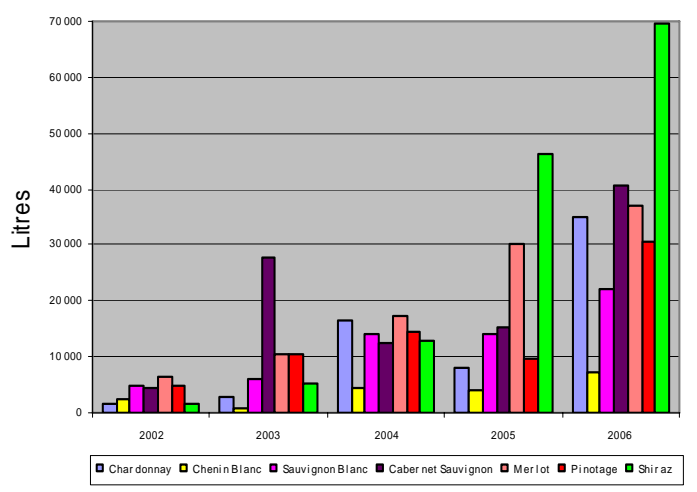
Russia



India



China

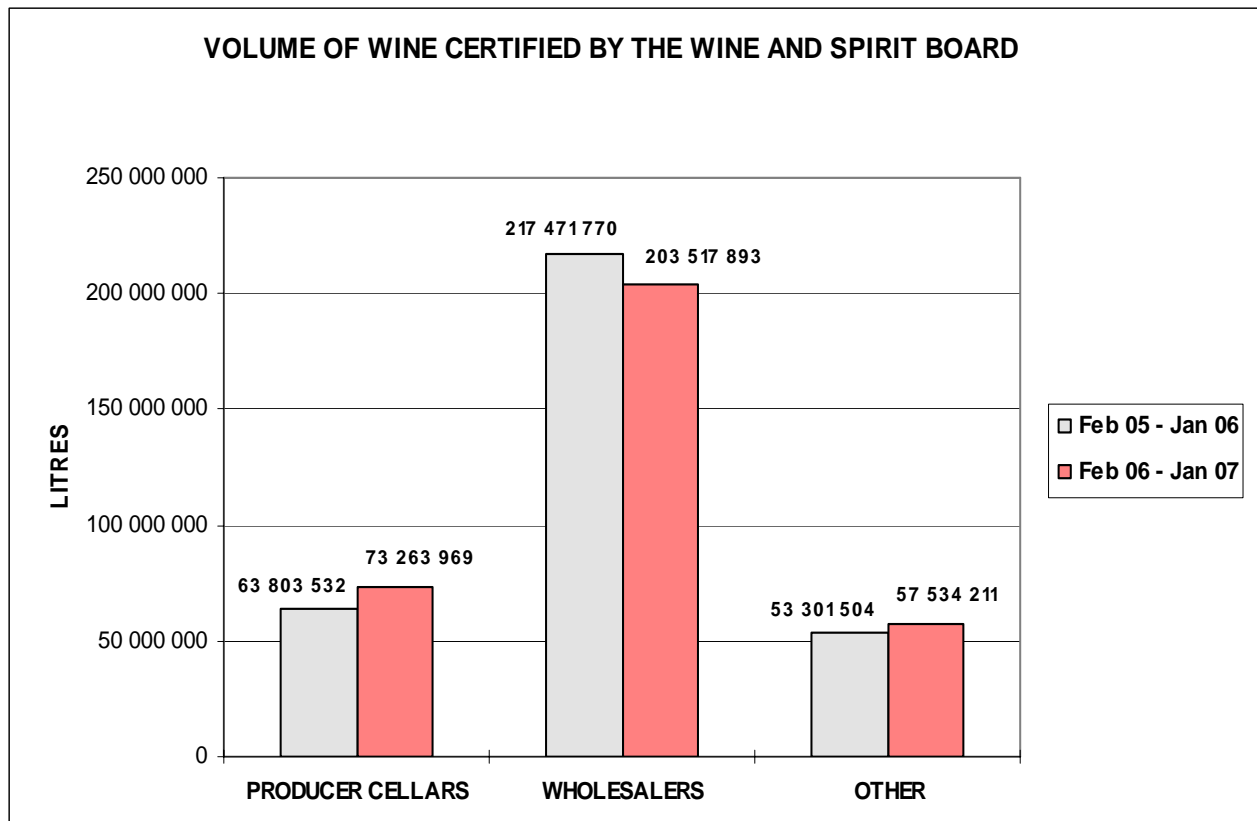


VOLUME OF WINE CERTIFIED (LITRES)

	1 MONTH			3 MONTHS			6 MONTHS			12 MONTHS		
	Jan-06	Jan-07	Trend	Nov-05 Jan-06	Nov-06 Jan-07	Trend	Aug-05 Jan-06	Aug-06 Jan-07	Trend	Feb-05 Jan-06	Feb-06 Jan-07	Trend
PRODUCER CELLARS												
Estate Wine	0	0		0	0		0	0		0	0	
Wine of Origin	2 038 119	3 229 004	158	6 800 369	11 784 554	173	15 935 690	22 513 157	141	36 109 735	41 036 385	114
Geographical Unit Wine	2 491 452	2 067 004	83	6 834 322	7 908 315	116	14 178 545	16 780 628	118	27 693 797	32 227 584	116
SUB TOTAL	4 529 571	5 296 008	117	13 634 691	19 692 869	144	30 114 235	39 293 785	130	63 803 532	73 263 969	115
WHOLESALERS												
Estate Wine	0	0		0	0		0	0		0	0	
Wine of Origin	1 704 056	1 760 772	103	5 970 450	6 372 773	107	14 638 607	14 733 617	101	29 124 983	30 943 388	106
Geographical Unit Wine	11 111 325	12 172 112	110	37 125 835	40 647 004	109	86 735 671	83 893 046	97	188 346 787	172 574 505	92
SUB TOTAL	12 815 381	13 932 884	109	43 096 285	47 019 777	109	101 374 278	98 626 663	97	217 471 770	203 517 893	94
OTHER												
Estate Wine	453 818	623 183	137	1 795 698	2 098 833	117	4 017 383	4 214 114	105	7 634 159	8 309 960	109
Wine of Origin	1 345 440	2 379 116	177	6 909 181	9 030 771	131	15 729 602	17 863 676	114	30 676 596	33 892 343	110
Geographical Unit Wine	711 006	916 850	129	3 291 489	3 836 277	117	7 737 071	7 808 496	101	14 990 749	15 331 908	102
SUB TOTAL	2 510 264	3 919 149	156	11 996 368	14 965 881	125	27 484 056	29 886 286	109	53 301 504	57 534 211	108
TOTAL	19 855 216	23 148 041	117	68 727 344	81 678 527	119	158 972 569	167 806 734	106	334 576 806	334 316 073	100

CERTIFIED BULK EXPORTS (included in above figures)	1 MONTH			3 MONTHS			6 MONTHS			12 MONTHS		
	Jan-06	Jan-07	Trend	Nov-05 Jan-06	Nov-06 Jan-07	Trend	Aug-05 Jan-06	Aug-06 Jan-07	Trend	Feb-05 Jan-06	Feb-06 Jan-07	Trend
	7 702 545	9 299 515	121	22 351 255	27 326 405	122	48 633 822	53 645 067	110	101 944 436	106 984 577	105

*The total volume of wine certified in the 2006 calendar year made up 47.6% of the 2006 wine production (52.9%-2005,44.1%-2004,38.5%-2003,43.7%-2002)



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