

HARVEST AND SALES ESTIMATE - AUGUST 2011

WINE PRODUCED	Average % alc/vol 2011	million gross litres						Estimate 2011	Trend 2011/ 2010
		2005	2006	2007	2008	2009	2010		
Wine		628.5	709.7	730.4	763.3	805.1	779.8	827.5	106.1
Wine for brandy	11.06	82.9	82.1	101.5	86.6	71.4	39.6	34.2	86.4
Grape juice concentrate and grape juice		64.6	73.2	65.2	72.5	34.8	52.1	37.8	72.5
Distilling wine	9.35	129.2	147.9	146.4	166.6	122.1	113.3	104.8	92.5
Total		905.2	1 013.0	1 043.5	1 089.0	1 033.4	984.8	1 004.2	102.0

WINE MARKET REQUIREMENT	million gross litres						Estimate 2011	Trend 2011/ 2010
	2005	2006	2007	2008	2009	2010		
Producer sales to wholesalers: Wine in bulk	419.1	407.6	441.3	539.0	508.4	503.2	452.9	90.0
Grapes	67.5	71.8	67.2	70.9	71.0	62.8	74.1	118.0
	486.6	479.4	508.5	610.0	579.4	566.0	527.0	93.1
Direct producer sales (packaged wine) and exports	148.2	155.4	173.4	200.1	196.5	200.3	198.3	99.0
Total	634.8	634.8	681.9	810.0	775.9	766.3	725.3	94.6
Wine imported in bulk by wholesalers*	15.4	11.3	9.2	11.0	12.3	9.8	13.0	132.4
Total wine market requirement	650.2	646.1	691.1	821.1	788.3	776.1	738.2	95.1

* must for sweetening purposes included

WINE PRODUCTION AND SALES	million gross litres						Estimate 2011	Trend 2011/ 2010
	2005	2006	2007	2008	2009	2010		
Total wine stock at private and producer cellars on 1 Jan							351.0	
Wine production	628.5	709.7	730.4	763.3	805.1	779.8	827.5	106.1
Natural wine and must for sweetening imported by private and producer cellars	3.7	7.0	3.7	8.0	3.8	0.0	2.4	
Minus: Sales	634.8	634.8	681.9	810.0	775.9	766.3	725.3	94.6
Transfers (previous vintages)	5.4	3.6	10.2	6.1	5.7	5.2	5.2	100.0
Lees destroyed/shortages	17.7	18.2	22.7	23.6	25.9	22.4	22.4	100.0
Total wine stock at private and producer cellars on 31 Dec	339.4	403.1	425.2	357.2	361.7	351.0	428.0	121.9
Total wine stock at producer cellars on 31 Dec	221.1	278.4	295.4	236.2	232.7	220.1		
Total wine stock at private cellars on 31 Dec	118.3	124.6	129.8	121.0	129.0	130.9		

DISTILLING WINE MARKET REQUIREMENT	million litres @ 10% alc/vol						Estimate 2011	Trend 2011/ 2010
	2005	2006	2007	2008	2009	2010		
Ex industry (current and previous vintages)	130.3	148.5	154.6	168.0	129.7	115.5	104.0	90.0
Ex import (current year)	24.3	31.1	39.6	10.4	4.1	20.3	58.0	285.7
Ex import (previous year)	30.0	10.0	-					
Ex pool	1.8	1.4	0.04	0.46	0.02	0.02	0.02	100.0
Total	186.4	191.0	194.2	178.8	133.8	135.8	162.0	119.3
Pool deliveries	1.8	1.4	0.04	0.46	0.02	0.02	0.02	100.0
Ex import (destined for following year's market requirement)	10.0							