

## HARVEST AND SALES ESTIMATE - MARCH 2011

WINE PRODUCED	Average % alc/vol 2010	million gross litres							Trend 2011/ 2010
		2005	2006	2007	2008	2009	2010	Estimate 2011	
Wine		628.5	709.7	730.4	763.3	805.1	779.8	778.8	99.9
Wine for brandy	11.51	82.9	82.1	101.5	86.6	71.4	39.6	33.6	84.9
Grape juice concentrate and grape juice		64.6	73.2	65.2	72.5	34.8	52.1	37.4	71.8
Distilling wine	9.82	129.2	147.9	146.4	166.6	122.1	113.3	123.9	109.4
<b>Total</b>		<b>905.2</b>	<b>1 013.0</b>	<b>1 043.5</b>	<b>1 089.0</b>	<b>1 033.4</b>	<b>984.8</b>	<b>973.7</b>	<b>98.9</b>

WINE MARKET REQUIREMENT	million gross litres							Trend 2011/ 2010
	2005	2006	2007	2008	2009	2010	Estimate 2011	
Producer sales to wholesalers: Wine in bulk	419.1	407.6	441.3	539.0	508.4	503.2		0.0
Grapes	67.5	71.8	67.2	70.9	71.0	62.8		0.0
	<b>486.6</b>	<b>479.4</b>	<b>508.5</b>	<b>610.0</b>	<b>579.4</b>	<b>566.0</b>		<b>0.0</b>
Direct producer sales (packaged wine) and exports	148.2	155.4	173.4	200.1	196.5	200.3		0.0
<b>Total</b>	<b>634.8</b>	<b>634.8</b>	<b>681.9</b>	<b>810.0</b>	<b>775.9</b>	<b>766.3</b>	<b>764.1</b>	<b>99.7</b>
Wine imported in bulk by wholesalers*	15.4	11.3	9.2	11.0	12.3	9.8	12.0	122.5
<b>Total wine market requirement</b>	<b>650.2</b>	<b>646.1</b>	<b>691.1</b>	<b>821.1</b>	<b>788.3</b>	<b>776.1</b>	<b>776.1</b>	<b>100.0</b>

\* must for sweetening purposes included

WINE PRODUCTION AND SALES	million gross litres							Trend 2011/ 2010
	2005	2006	2007	2008	2009	2010	Estimate 2011	
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	778.8	99.9
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	
<b>Minus: Sales</b>	<b>634.8</b>	<b>634.8</b>	<b>681.9</b>	<b>810.0</b>	<b>775.9</b>	<b>766.3</b>	<b>764.1</b>	<b>99.7</b>
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	<b>339.4</b>	<b>403.1</b>	<b>425.2</b>	<b>357.2</b>	<b>361.7</b>	<b>351.0</b>	<b>340.5</b>	<b>97.0</b>
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							Trend 2011/ 2010
	2005	2006	2007	2008	2009	2010	Estimate 2011	
Ex industry (current and previous vintages)	130.3	148.5	154.6	168.0	129.7	115.5	127.8	110.7
Ex import (current year)	24.3	31.1	39.6	10.4	4.1	20.3	34.2	168.5
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
<b>Total</b>	<b>186.4</b>	<b>191.0</b>	<b>194.2</b>	<b>178.8</b>	<b>133.8</b>	<b>135.8</b>	<b>162.0</b>	<b>119.3</b>
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							