

# Status of Wine-grape Vines as on 31 December 2013

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SAWIS

# Statistics i.r.o. South African wine grape vineyards over the past 10 years (2003 - 2013)

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## 1 Overview

Total hectares for 2013 stand at 99 680 ha compared to 100 093 ha in 2012. This represents a decrease of 413 ha. Until 2006 the total surface showed an annual increase; since then a steady decrease totaling 2 466 ha.

Varieties remained relatively constant (Table 1). Chenin blanc and Colombar remain overall the most planted white varieties, followed by Cabernet Sauvignon and Shiraz as the most planted red varieties. Since 2003 Colombar has passed Cabernet Sauvignon as the second most planted variety.

For the period 2003 – 2013 the vineyard area as a percentage of the total area increased in Robertson and Bredekloof regions, while decreasing in the Stellenbosch, Paarl and Swartland regions (Table 2). Over the past 10 years there was no significant change in the hectare percentage white and red wine grapes in the various regions (Figure 4).

Regarding individual wine grape varieties, Chenin blanc represented 19.6% of the total wine surface in 2003, Colombar 11.2%, Cabernet Sauvignon 13.3%, Pinotage 6.9%, Chardonnay 6.8%, Shiraz 8.8%, Sauvignon blanc 6.9%, followed by the varieties detailed in Table 4. In 2013 Chenin blanc decreased to 17.9%. Sauvignon blanc and Shiraz increased significantly over this period, as well as lesser planted varieties such as Nouvelle, Mouvedre, Pinot Gris, Grenache (Red) and Villard blanc.

As mentioned before 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. 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. Notwithstanding this concern, the industry is able to produce large to record crops through improved and adjusted viticultural practices.

Ramsey is the only rootstock showing an upward planting trend in most regions, especially in Bredekloof, Olifants River, Robertson and Worcester.

The Perold and Drip occur most frequently as the wine industry's trellising and irrigation methods respectively.

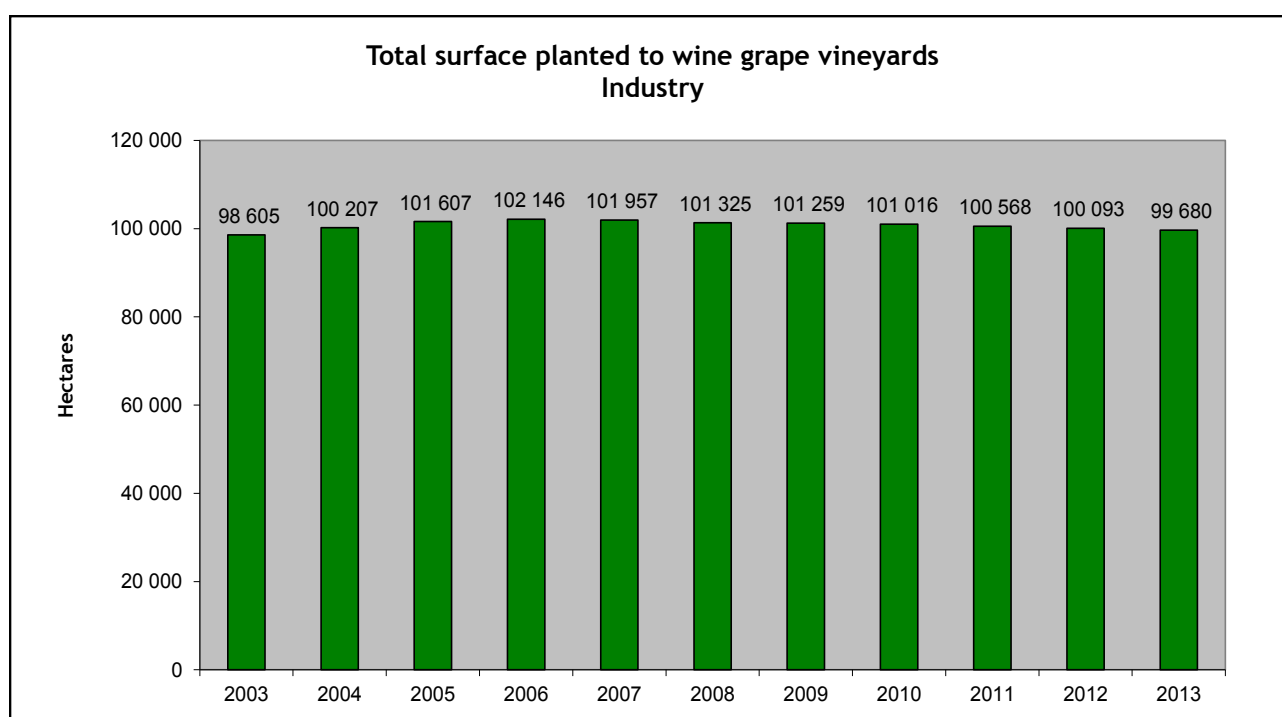


Figure 1: Total surface planted to wine grape vineyards in the industry

No	VARIETY	2003	2013	No	VARIETY	2003	2013
1	CHENIN BLANC	19 324.65	17 889.95	53	NEBBIOLO	18.72	19.99
2	COLOMBAR	11 025.76	11 696.36	54	TINTA AMARELLA	0.91	14.75
3	CABERNET SAUVIGNON	13 159.89	11 658.11	55	WINEGRAPE VARIETY	21.23	14.31
4	SHIRAZ (SYRAH)	8 724.11	10 508.79	56	GAMAY NOIR	35.58	13.93
5	SAUVIGNON BLANC	6 843.47	9 320.80	57	MEUNIER	4.14	13.86
6	CHARDONNAY	6 688.88	7 665.26	58	MUSCAT OTTONEL	23.51	10.36
7	PINOTAGE	6 829.31	7 196.07	59	IRSAY OLIVIER	0.00	10.08
8	MERLOT	6 781.28	6 183.48	60	ALICANTE BOUSCHET	15.64	9.98
9	RUBY CABERNET	2 533.30	2 312.35	61	PINOT BLANC	30.37	9.68
10	MUSCAT D'ALEXANDRIE	3 074.64	1 983.90	62	MARSANNE	0.00	9.53
11	CINSAUT	3 084.63	1 915.89	63	CARMENERE	0.00	9.23
12	SEMILLON (GROENDRUIF)	998.09	1 194.89	64	FLORA	0.25	8.60
13	PINOT NOIR	536.01	1 118.94	65	GRACIANO	0.00	7.48
14	CABERNET FRANC	865.20	881.46	66	WELDRA	35.35	7.07
15	VIOGNIER	352.16	878.91	67	HANEPOOT(RED)	4.16	6.77
16	MUSCAT DE FRONTIGNAN	665.32	788.59	68	KANAAN	56.23	6.75
17	PETIT VERDOT	389.37	764.53	69	CINSAUT BLANC	14.82	6.48
18	MALBEC	364.38	473.96	70	GRENACHE(GRIS)	0.00	5.30
19	NOUVELLE	10.99	427.74	71	GRASA DE COTNARI	0.00	3.48
20	MOURVEDRE (MATARO)	162.23	427.73	72	TOURIGA FRANCA	3.76	3.16
21	CROUCHEN	1 361.29	416.52	73	PORT VARIETY	7.18	3.13
22	MUSCADEL(RED)	313.62	387.62	74	GRACHEN	2.77	2.30
23	PINOT GRIS (RULANDER)	75.88	343.96	75	BOURBOULENC	2.45	2.20
24	GRENACHE (RED)	42.36	275.27	76	COLOMINO	6.60	2.10
25	VILLARD BLANC	7.18	270.03	77	PEDRO (VALSE PEDRO)	17.62	2.08
26	CLAIRETTE BLANCHE	483.34	263.59	78	PONTAK	6.25	1.80
27	TINTA BAROCCA	366.53	206.42	79	ALVARINHO/ALBARI	0.00	1.75
28	PALOMINO	772.49	180.41	80	CINSAUT GRIS	0.04	1.50
29	ROOBERNET	130.99	172.59	81	TINTA FRANCISC	0.85	1.39
30	RIESLING (WEISS)	319.75	168.36	82	NERO D'AVOLA	0.00	1.33
31	GEWURZTRAMINER	167.21	109.55	83	GRAND NOIR	0.00	1.19
32	TANNAT	9.90	107.25	84	SYLVANER	2.63	1.09
33	CARIGNAN	77.68	105.62	85	CORNIFESTO	1.88	0.85
34	TOURIGA NACIONAL	63.80	102.15	86	RIESLING TROLL (KERNER)	0.00	0.81
35	FERNAO PIRES	241.90	100.24	87	CHAMBOURCIN	0.00	0.81
36	UGNI BLANC (TREBBIANO)	94.91	96.63	88	VIDAL BLANC	0.00	0.26
37	THERONA	133.28	85.25	89	BEOGRADSKA CRNA	0.00	0.15
38	TEMPRANILLO	22.47	76.26	90	SEYVAL BLANC	0.00	0.12
39	EMERALD RIESLG	233.26	72.24	91	BAST CASTELLO	0.03	0.03
40	BUKETTRAUBE	209.29	70.31	92	TAMIOSA ROMANEAS	0.00	0.02
41	GRENACHE BLANC	21.31	65.90	93	KEUKA	0.01	0.00
42	SANGIOVESE	55.99	64.71	94	PERRICONE	0.01	0.00
43	CHENEL	181.75	61.48	95	KERNER	8.12	0.00
44	MORIO MUSCAT	19.12	53.17	96	FURMINT	6.36	0.00
45	ROUSSANNE	0.39	51.96	97	VITAL	0.26	0.00
46	BARBERA	33.16	49.52	98	FOLLET	0.25	0.00
47	VERDELHO	5.53	48.53	99	SCHONBURGER	0.32	0.00
48	SOUZAO	44.81	44.90	100	CSERSZEGI FUSZ	0.01	0.00
49	DURIF	1.38	37.38	101	BRAKBOSEILAND	0.75	0.00
50	ZINFANDEL	37.70	31.42	102	OLASZ	0.29	0.00
51	RAISIN BLANC	187.14	29.79	103	AUXERROIS	3.71	0.00
52	HARSLEVELU	143.32	27.97		TOTAL	98605.46	99 680.41

Table 1: Plantings of selected wine grape varieties for 2003 and 2013

District	2003		2013	
	% of total	Ha	% of total	Ha
Little Karoo	3%	2,927	3%	2,637
Northern Cape	5%	4,747	5%	4,652
Olifants River	10%	9,445	10%	10,116
Robertson	13%	12,703	15%	14,676
Swartland	15%	14,938	14%	13,509
Paarl	18%	17,949	16%	16,106
Stellenbosch	18%	17,401	16%	16,294
Worcester	9%	8,661	9%	8,814
Breedekloof	10%	9,834	13%	12,878
<b>Total</b>	<b>100%</b>	<b>98,605</b>	<b>100%</b>	<b>99,680</b>

Table 2: Distribution of wine grape vineyards (red & white) per wine region as a percentage (%) and hectares of the total SA wine grape vineyards surface (2003 - 2013)

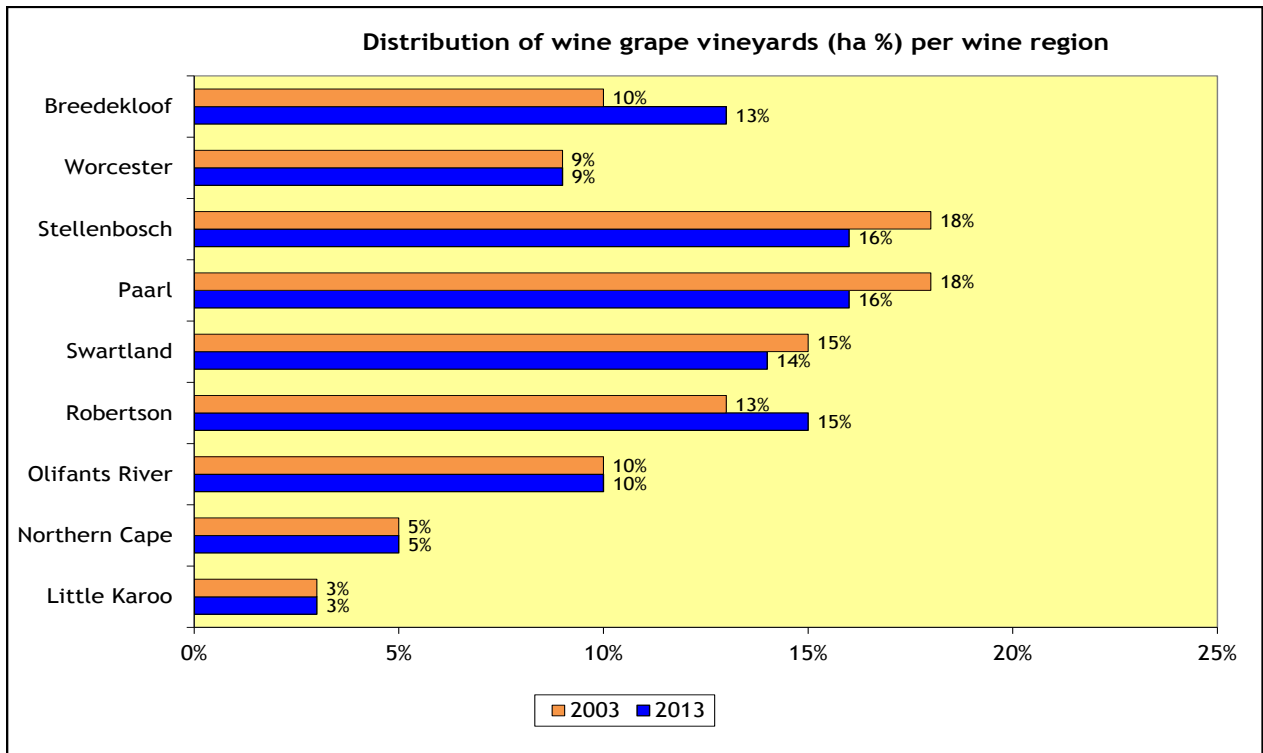


Figure 2: Distribution of wine grape vineyards as a percentage (%) per wine region (2013)

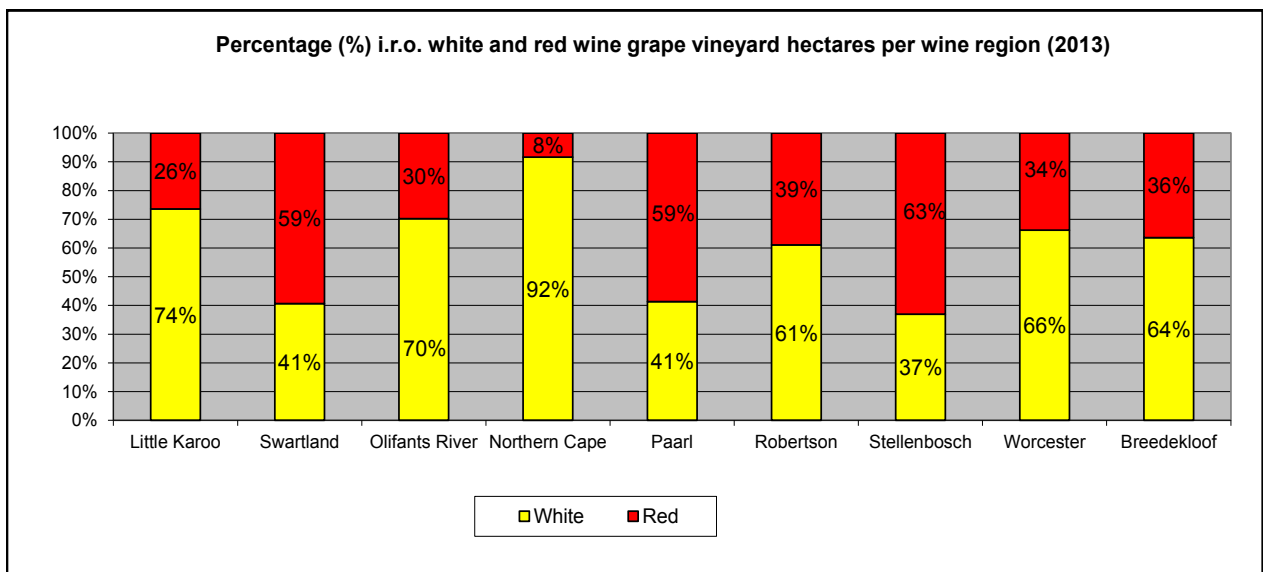


Figure 3: Percentage (%) white and red wine grape vineyard hectares per wine region (2013)

District	2003		2013	
	Red (ha)	White (ha)	Red (ha)	White (ha)
Little Karoo	25%	75%	26%	74%
Swartland	53%	47%	59%	41%
Olifants River	35%	65%	30%	70%
Northern Cape	11%	89%	8%	92%
Paarl	56%	44%	59%	41%
Robertson	36%	64%	39%	61%
Stellenbosch	65%	35%	63%	37%
Worcester	32%	68%	34%	66%
Breedekloof	36%	64%	36%	64%
<b>Total</b>	<b>45%</b>	<b>55%</b>	<b>45%</b>	<b>55%</b>

Table 3: Red and white wine grape vineyard distribution per wine region as a percentage (%) of the surface in each wine region (2003 and 2013)

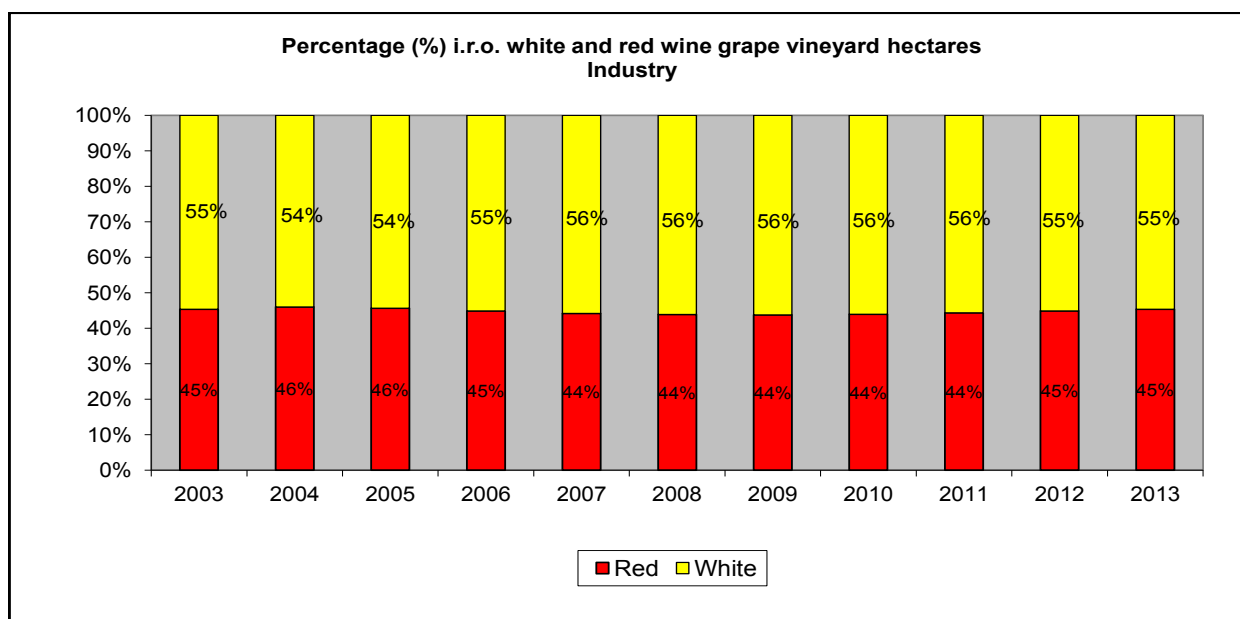


Figure 4: Percentage (%) white and red wine grape vineyard hectares

Variety	2003		2013		Change since 2003 (Ha)
	Hectares	% of total	Hectares	% of total	
Chenin blanc	19 325	19.6%	17 890	17.9%	-1 435
Cabernet Sauvignon	13 160	13.3%	11 658	11.7%	-1 502
Colombar	11 026	11.2%	11 696	11.7%	671
Shiraz (Syrah)	8 724	8.8%	10 509	10.5%	1 785
Sauvignon blanc	6 843	6.9%	9 321	9.4%	2 477
Chardonnay	6 689	6.8%	7 665	7.7%	976
Merlot	6 781	6.9%	6 183	6.2%	-598
Pinotage	6 829	6.9%	7 196	7.2%	367
Ruby Cabernet	2 533	2.6%	2 312	2.3%	-221
Muscat d'Alexandrie	3 075	3.1%	1 984	2.0%	-1 091
Cinsaut	3 085	3.1%	1 916	1.9%	-1 169
Crouchen (Cape Riesling)	1 361	1.4%	417	0.4%	-945
Palomino	772	0.8%	180	0.2%	-592
Other	8 402	8.5%	10 753	10.8%	2 351
<b>Total</b>	<b>98 605</b>	<b>100%</b>	<b>99 680</b>	<b>100%</b>	<b>1 075</b>

Table 4: Surface i.r.o. most planted varieties in the industry (2003 and 2013)

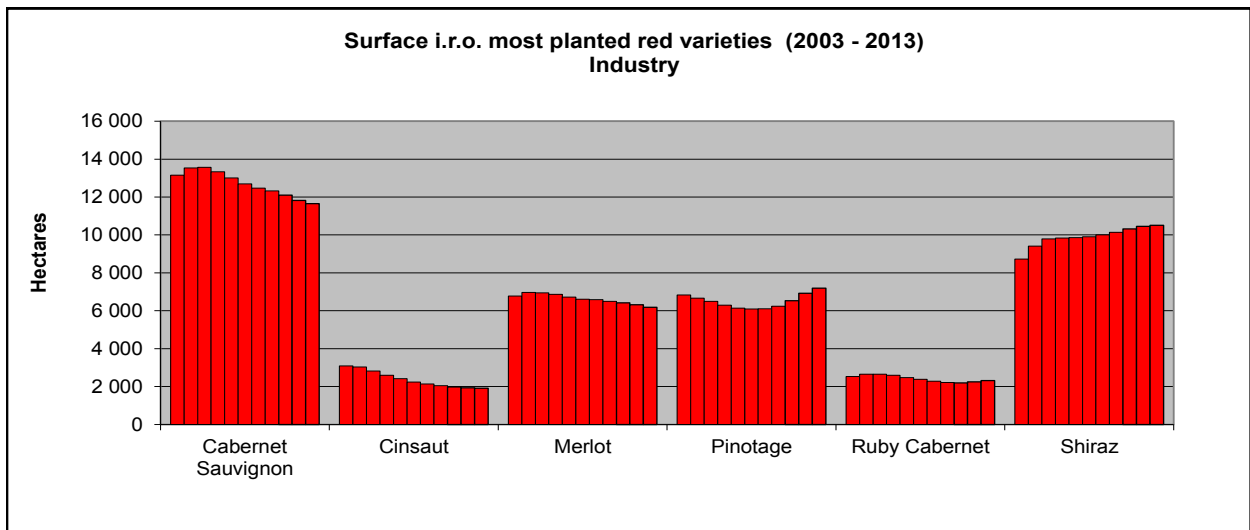


Figure 5: Surface i.r.o. most planted red varieties in the industry (2003 - 2013)

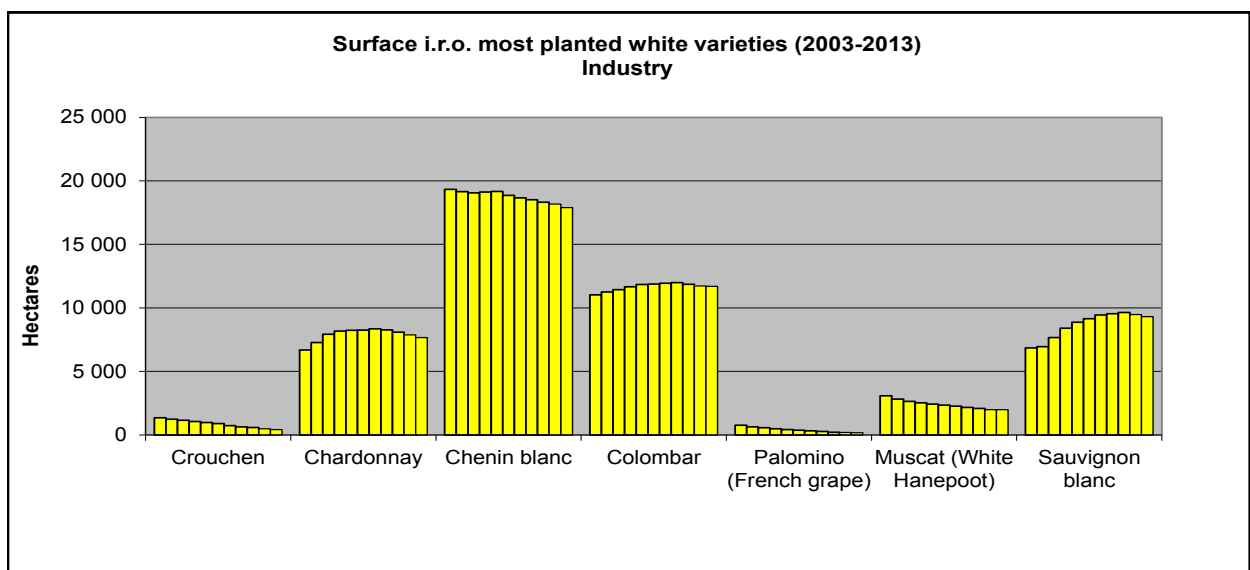


Figure 6: Surface i.r.o. most planted white varieties in the industry (2003 - 2013)

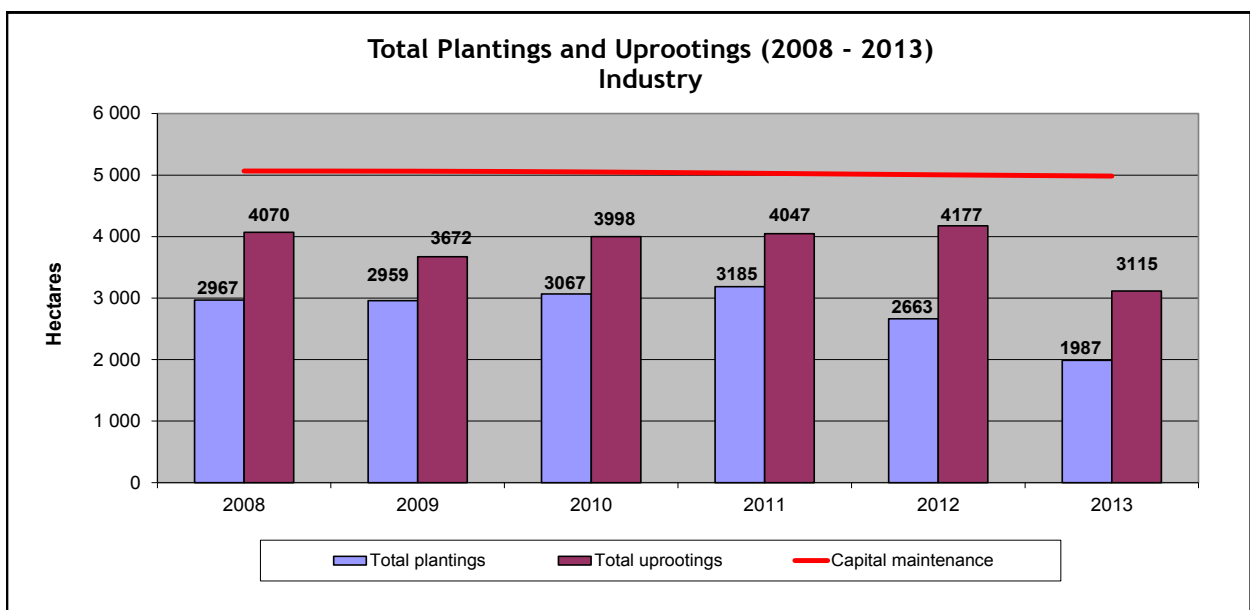


Figure 7: Plantings and uprooting i.r.o. red and white grape vineyards in the industry (2008 - 2013)

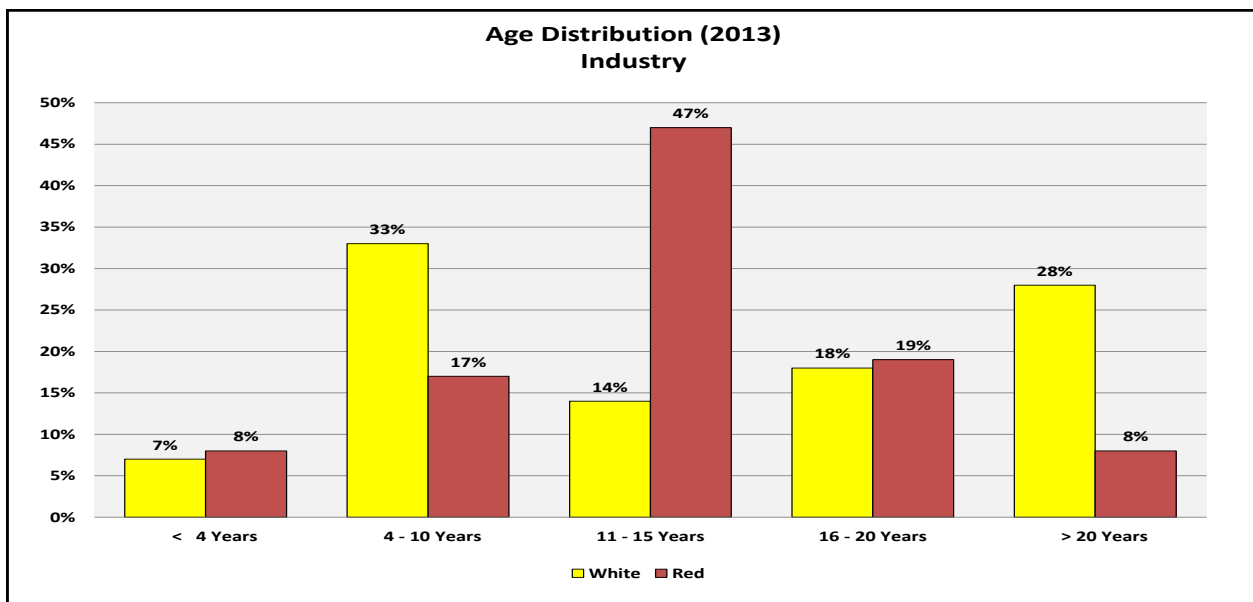


Figure 8: Age distribution of white and red wine grape vineyards (2013)

AGE OF VINES	HECTARES IN WINE REGION AS % OF TOTAL									
	TOTAL HECTARES	NORTHERN CAPE	OLIFANTS RIVER	SWART-LAND	LITTLE KAROO	PAARL	ROBERTSON	STELLENBOSCH	WORCESTER	BREDEKLOOF
< 4 Years	7.3	3.6	6.6	5.8	8.2	7.0	11.0	3.9	9.4	8.0
4 - 10 Years	32.9	25.8	30.0	28.2	33.8	26.8	36.7	32.8	43.7	35.5
11 - 15 Years	13.5	20.2	11.6	16.3	12.6	14.8	12.4	14.0	12.2	10.8
16 - 20 Years	18.1	32.6	21.0	16.0	19.3	13.5	17.8	13.6	14.6	19.1
> 20 Years	28.1	17.9	30.9	33.6	26.2	38.0	22.1	35.8	20.1	26.5
<b>Total white varieties</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
< 4 Years	8.2	7.4	8.5	6.2	5.3	6.2	15.8	3.2	13.1	15.0
4 - 10 Years	16.7	24.3	9.9	13.2	22.2	16.4	18.9	16.9	29.5	14.8
11 - 15 Years	47.3	38.6	55.1	47.2	48.3	48.3	42.4	49.2	41.5	46.5
16 - 20 Years	19.4	22.0	21.3	25.4	15.5	20.1	17.5	17.3	11.0	19.1
> 20 Years	8.4	7.7	5.2	8.0	8.6	9.1	5.5	13.4	4.9	4.7
<b>Total red varieties</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Table 5: Age distribution of vines per region per variety group for 2013 - % (Excluding Sultana)

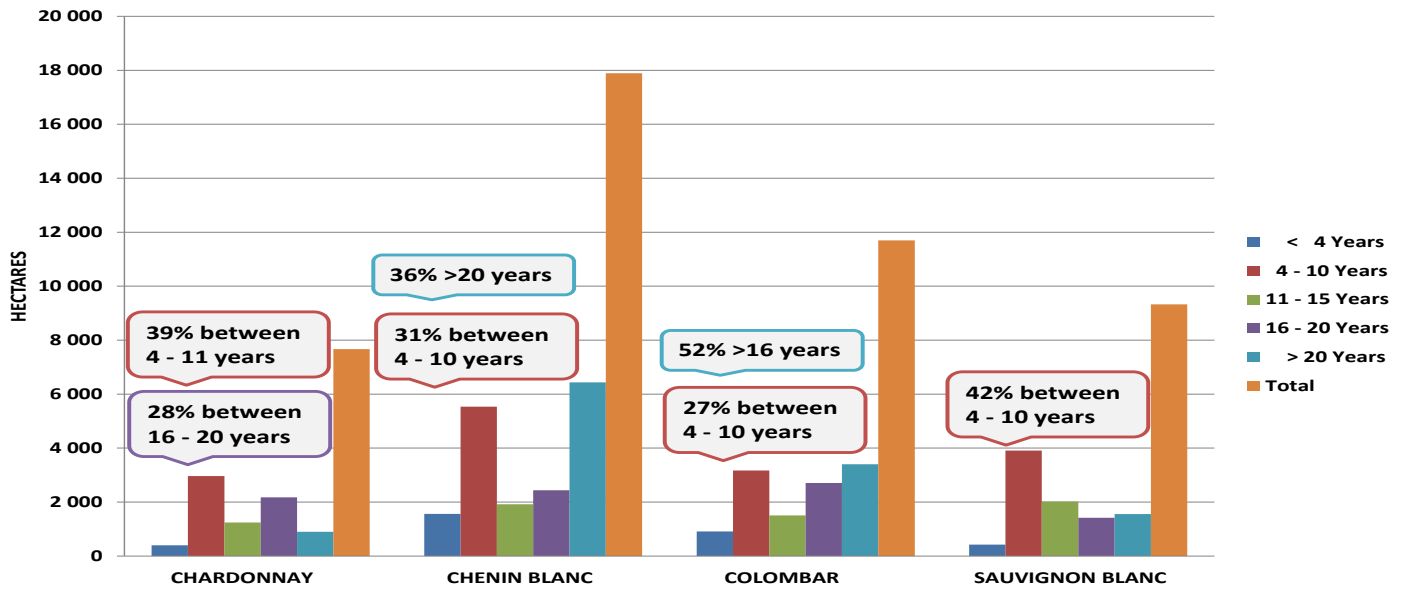
### Age Distribution per Variety

Figure 9 depicts the age distribution of selected varieties per wine region. The predominant age of Pinotage is 16 - 20 years, followed by Cabernet Sauvignon, Merlot and Shiraz with 11 - 15 years. Regarding white varieties Sauvignon blanc and Chardonnay lead with 4 - 10 years, followed by Chenin blanc and Colombar with >20 and 4 - 10 years.

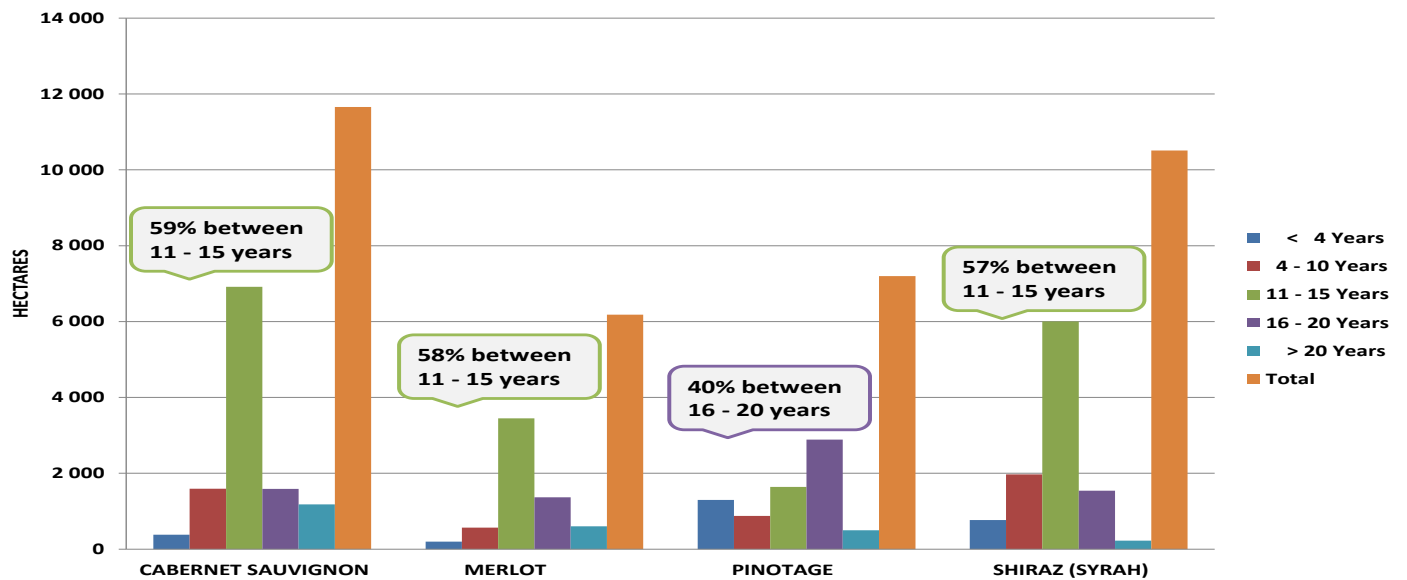
The oldest red varieties are found in Stellenboch, Paarl and Swartland regions. Olifants River, Robertson, Bredekloof and Worcester lead with Chenin blanc and Colombar plantings. Pinotage < 4 years are found mainly in Robertson, Bredekloof, Paarl and Worcester regions. Both younger white and red varieties are found across all regions; certain regions leading the renewing of specific varieties.



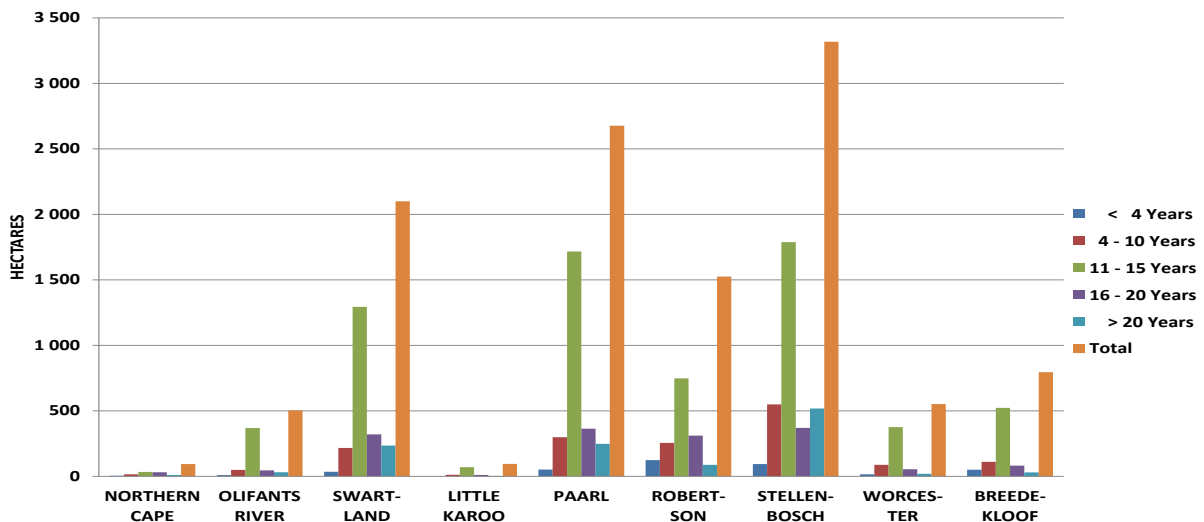
### AGE OF VINES PER WHITE VARIETY FOR 2013



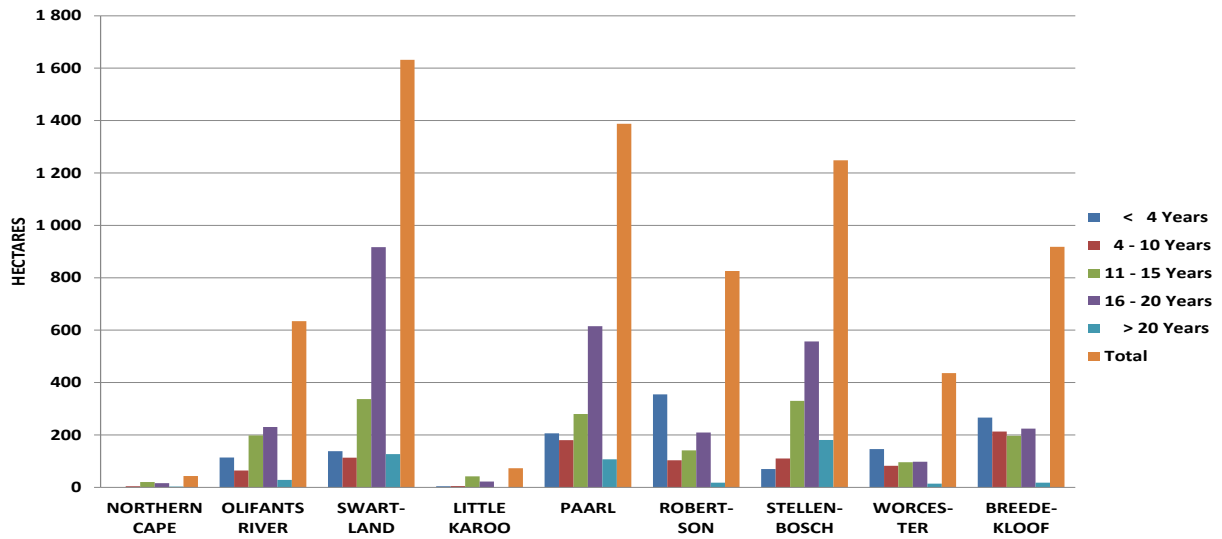
### AGE OF VINES PER RED VARIETY FOR 2013



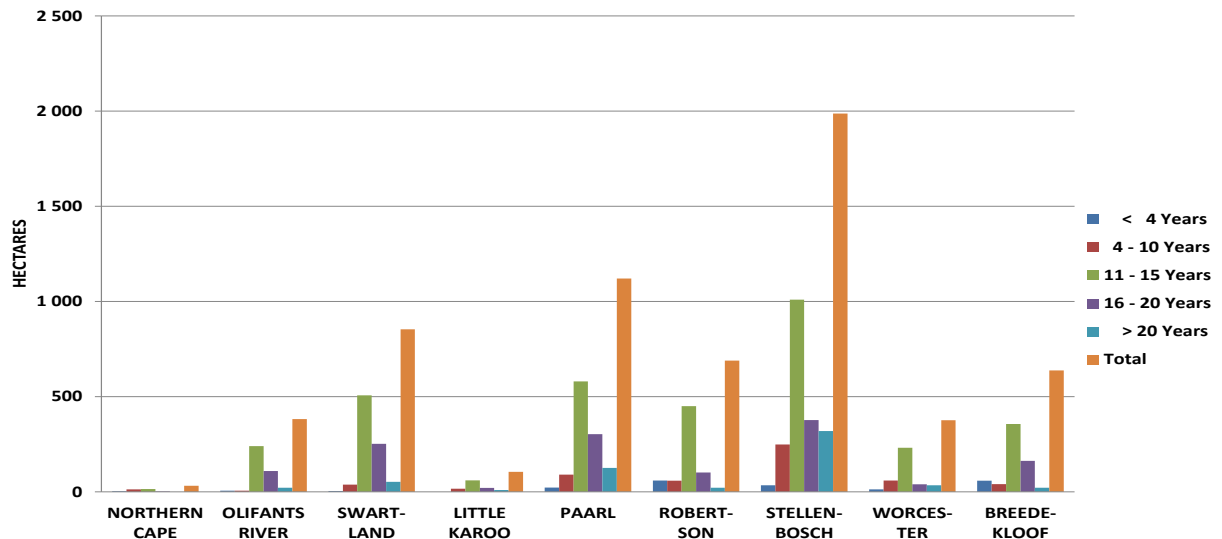
### AGE OF VINES PER VARIETY PER WINE REGION FOR 2013 CABERNET SAUVIGNON



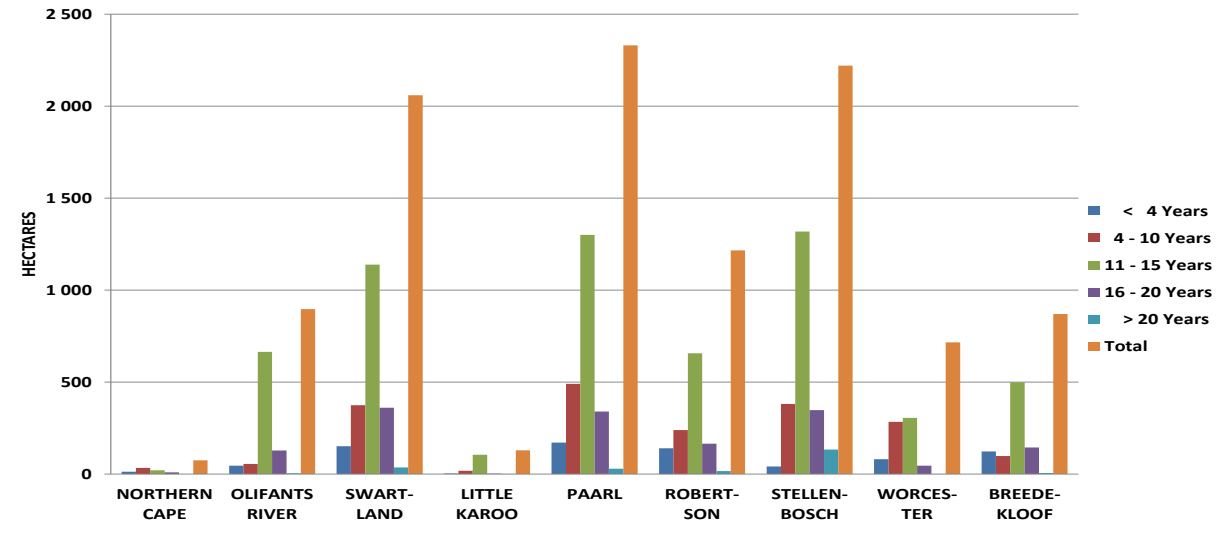
**AGE OF VINES PER VARIETY PER WINE REGION FOR 2013  
PINOTAGE**



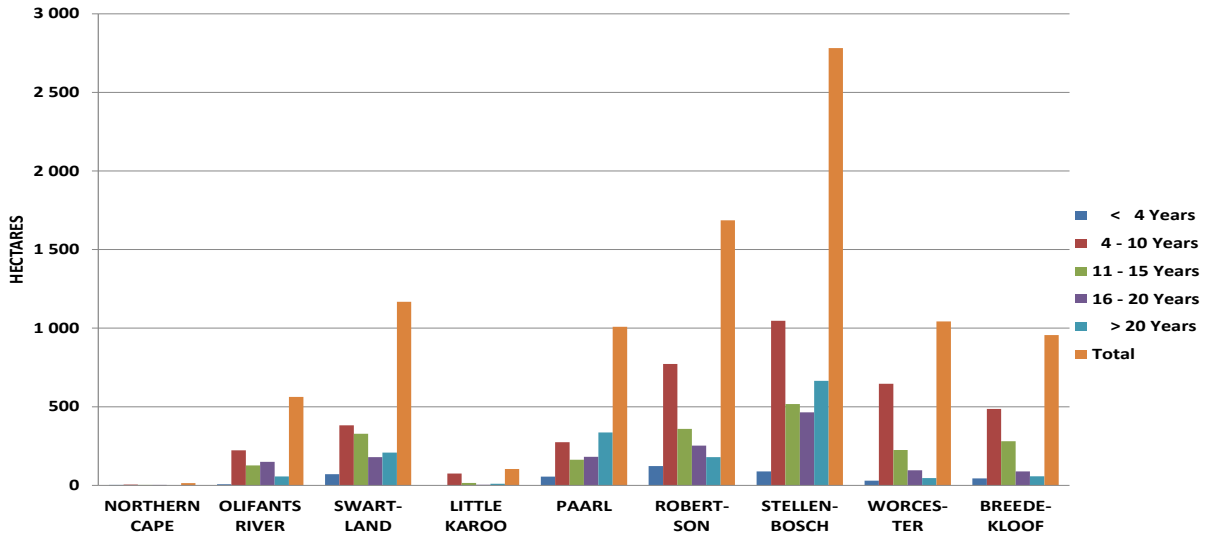
**AGE OF VINES PER VARIETY PER WINE REGION FOR 2013  
MERLOT**



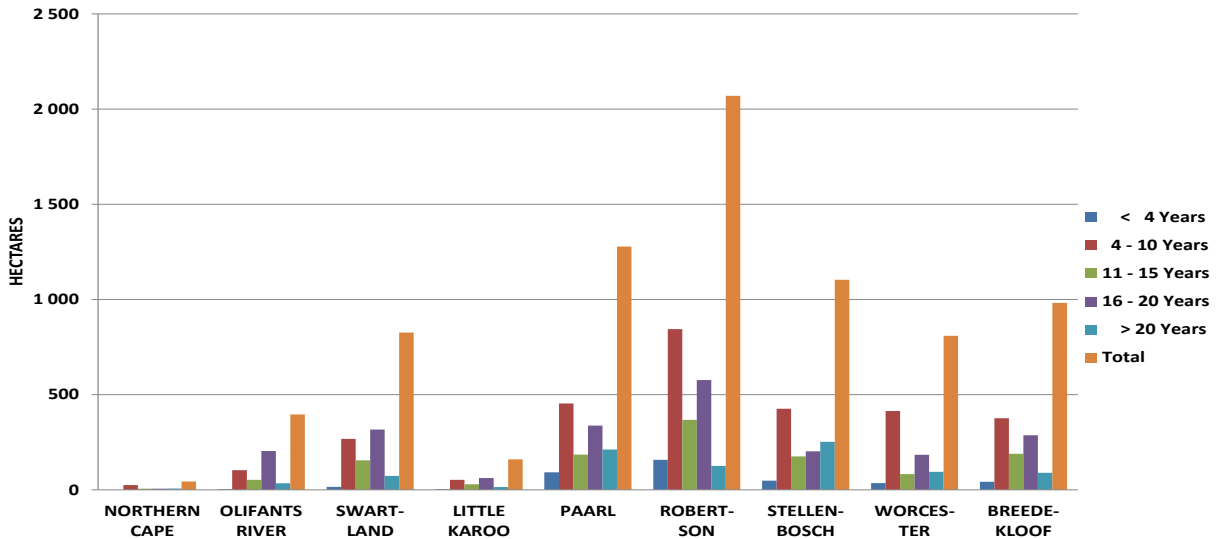
**AGE OF VINES PER VARIETY PER WINE REGION FOR 2013  
SHIRAZ (SYRAH)**



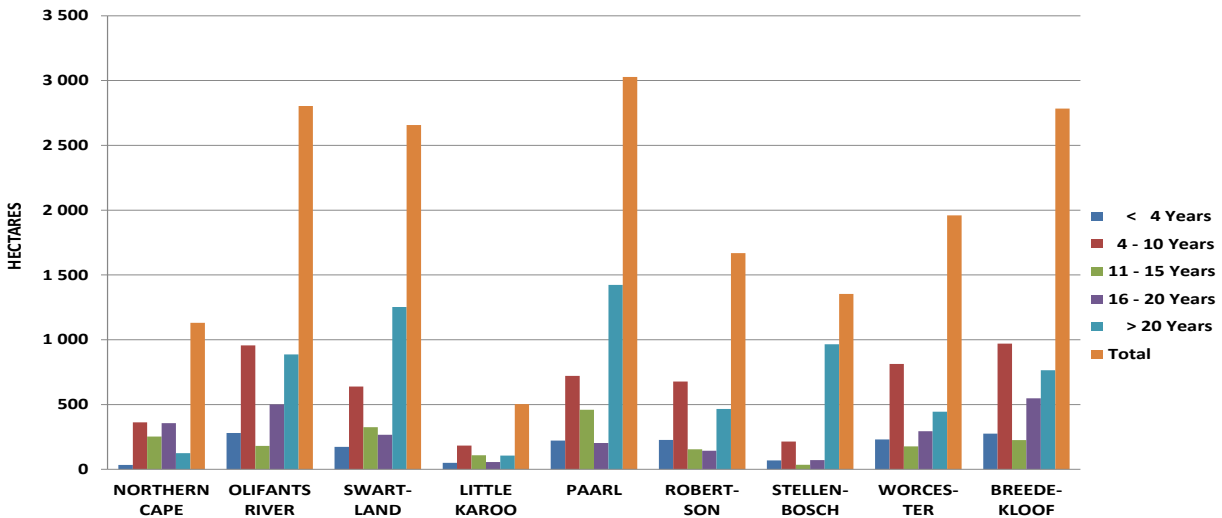
**AGE OF VINES PER VARIETY PER WINE REGION FOR 2013  
SAUVIGNON BLANC**



**AGE OF VINES PER VARIETY PER WINE REGION FOR 2013  
CHARDONNAY**



**AGE OF VINES PER VARIETY PER WINE REGION FOR 2013  
CHENIN BLANC**



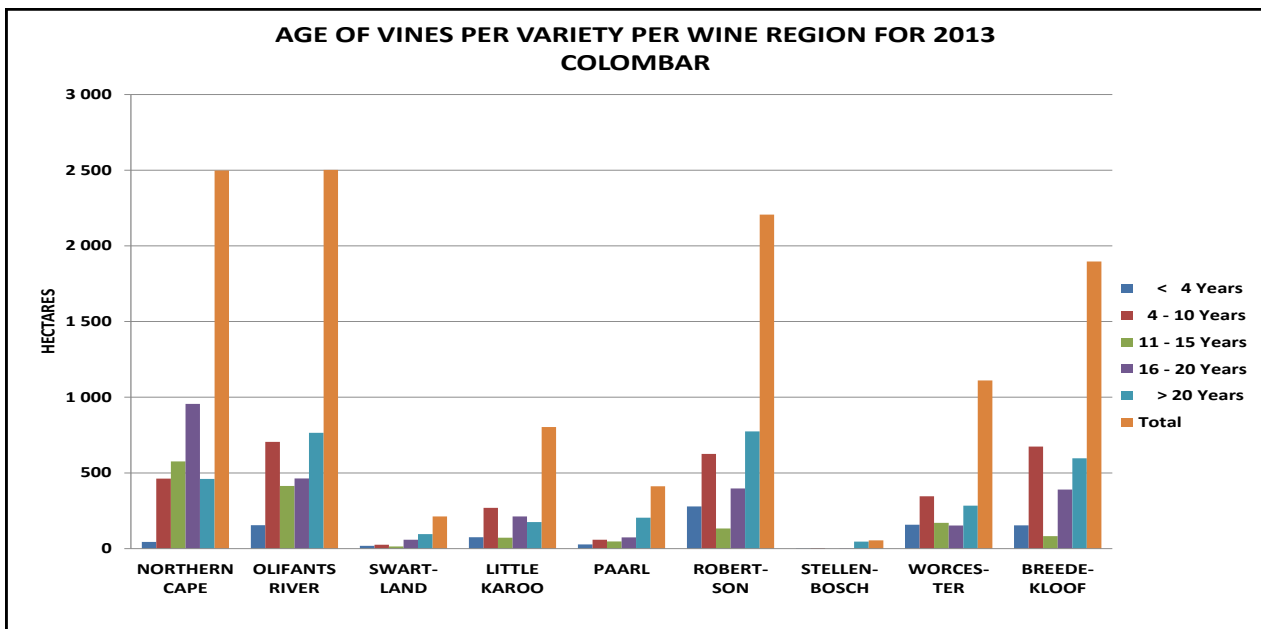


Figure 9: Age of vines per variety per wine region for 2013

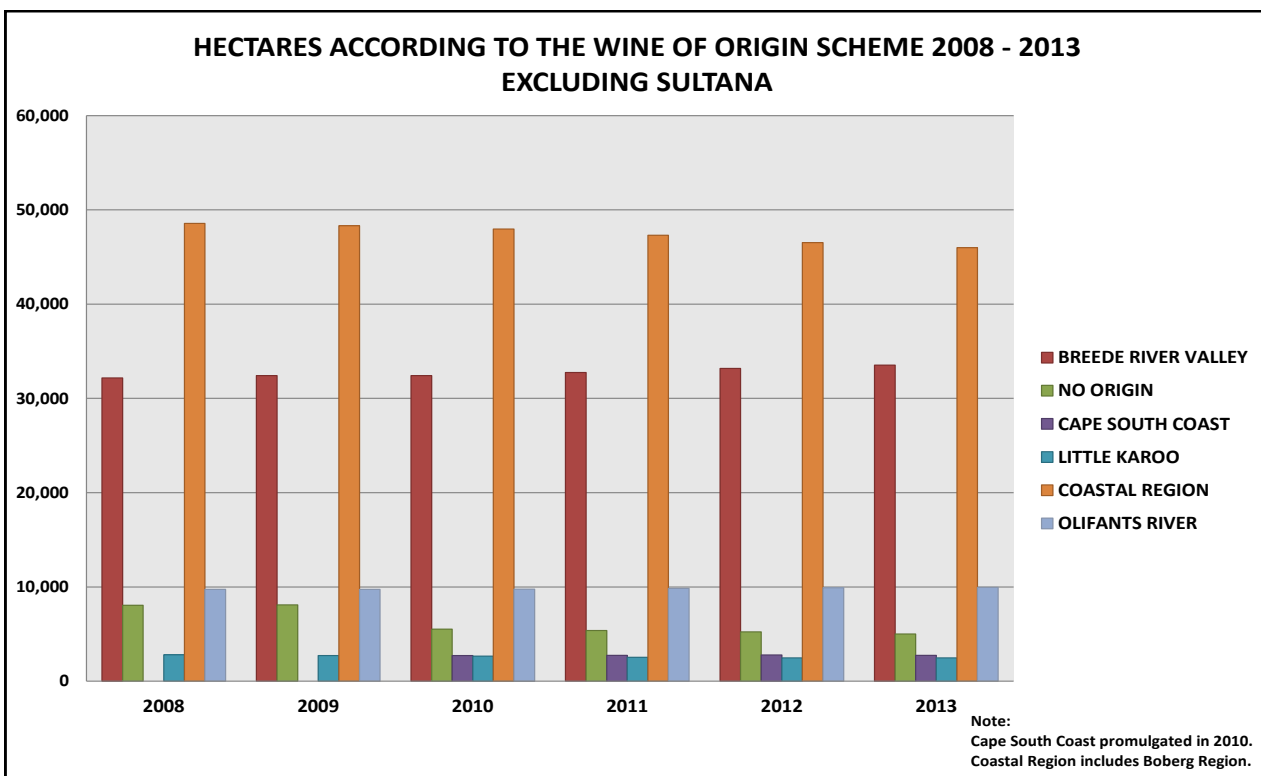
**Replacement of wine-grape vines**

The table below confirms the non-replacement of vineyards.

	Total Hectares	Little Karoo	Swart-land	Olifants River	Northern Cape	Paarl	Robert-son	Stellen-bosch	Worces-ter	Breede-kloof
Total white and red varieties	4 984.0	131.8	675.5	505.8	232.6	805.3	733.8	814.7	440.7	643.9
Actual planted	1 987.0	65.3	185.6	172.1	21.9	252.3	530.8	106.9	307.1	345.1

Table 6: Replacement per hectares per wine region at an annual rate of 5% - 2013 (Excluding Sultana)

**2 Hectares in wine regions according to the Wine of Origin Scheme** (detail statistics according to WO available on request)

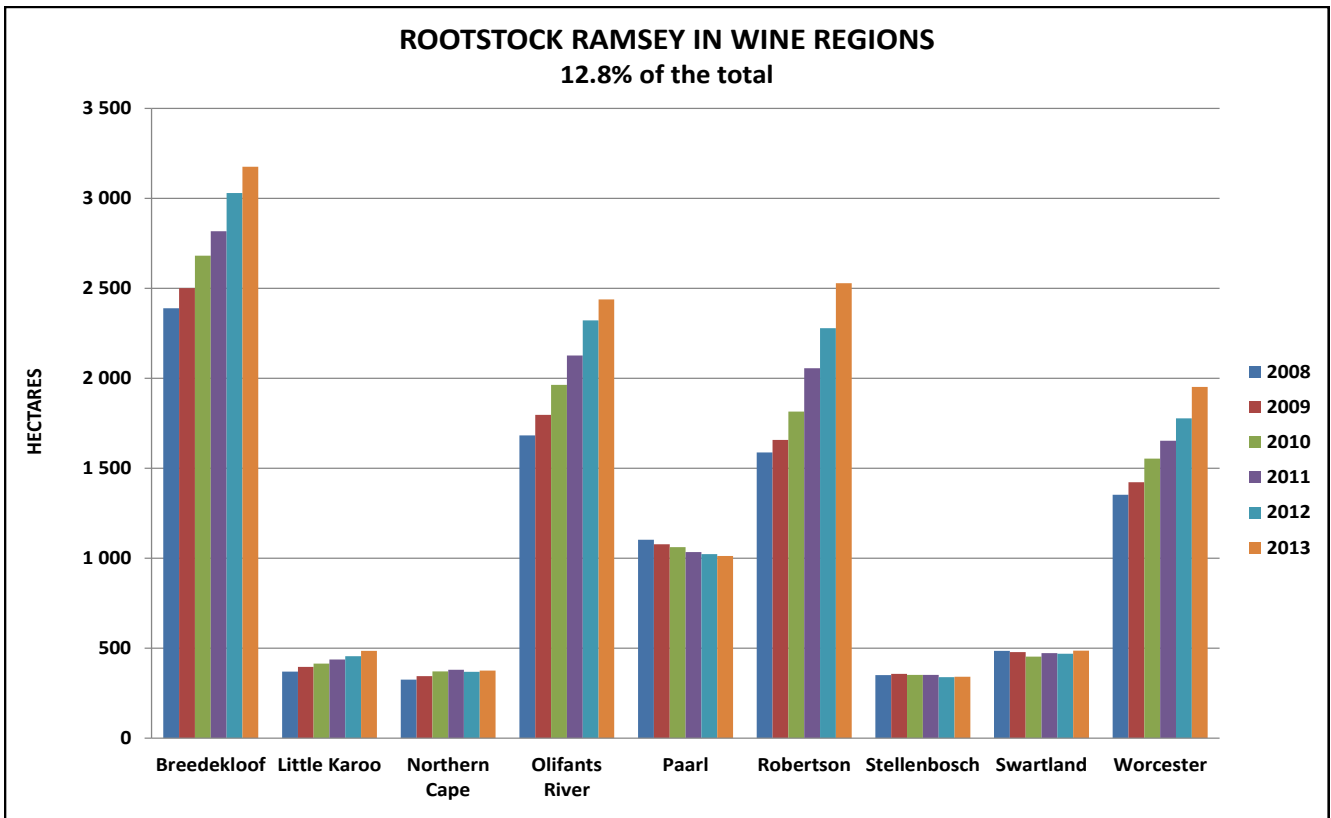
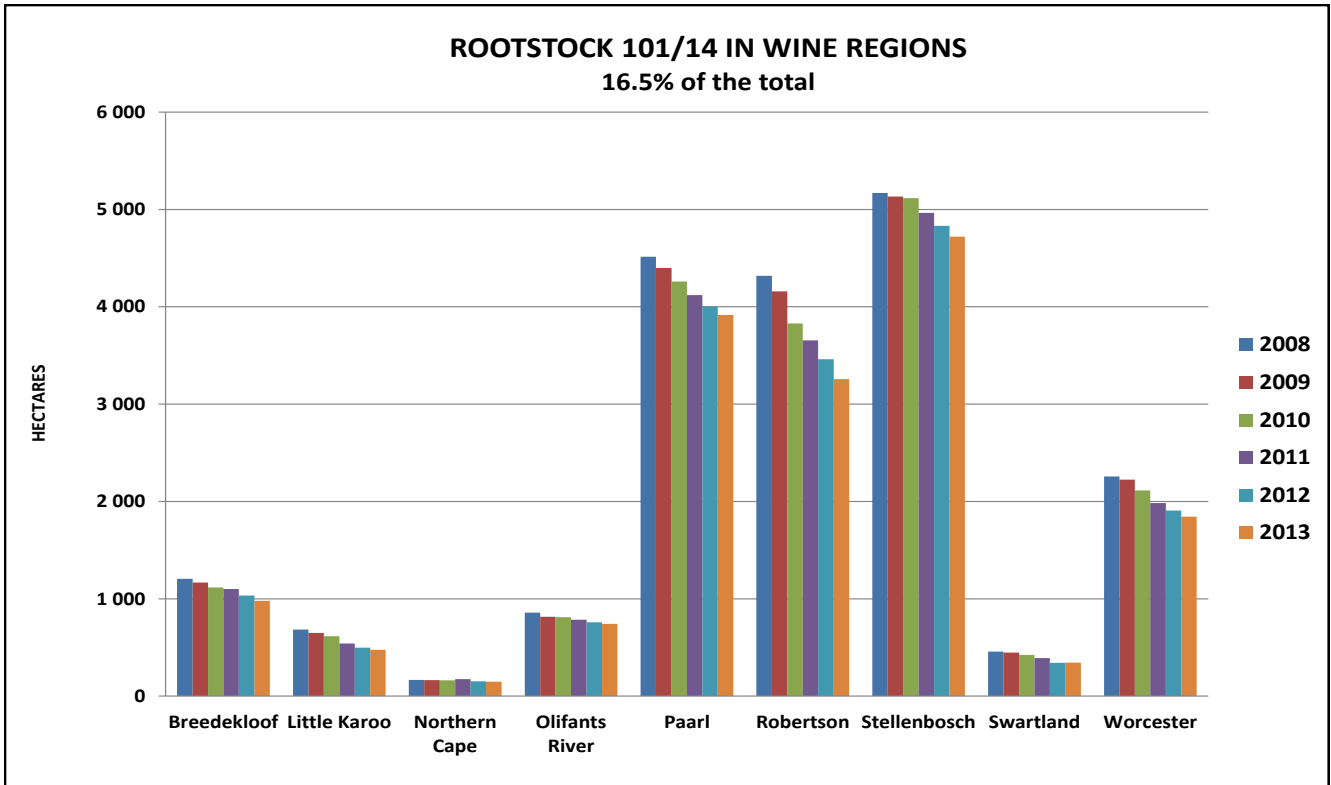


### 3 Rootstock

The rootstock mentioned below constitutes 88% of the total rootstock in the industry in 2013.

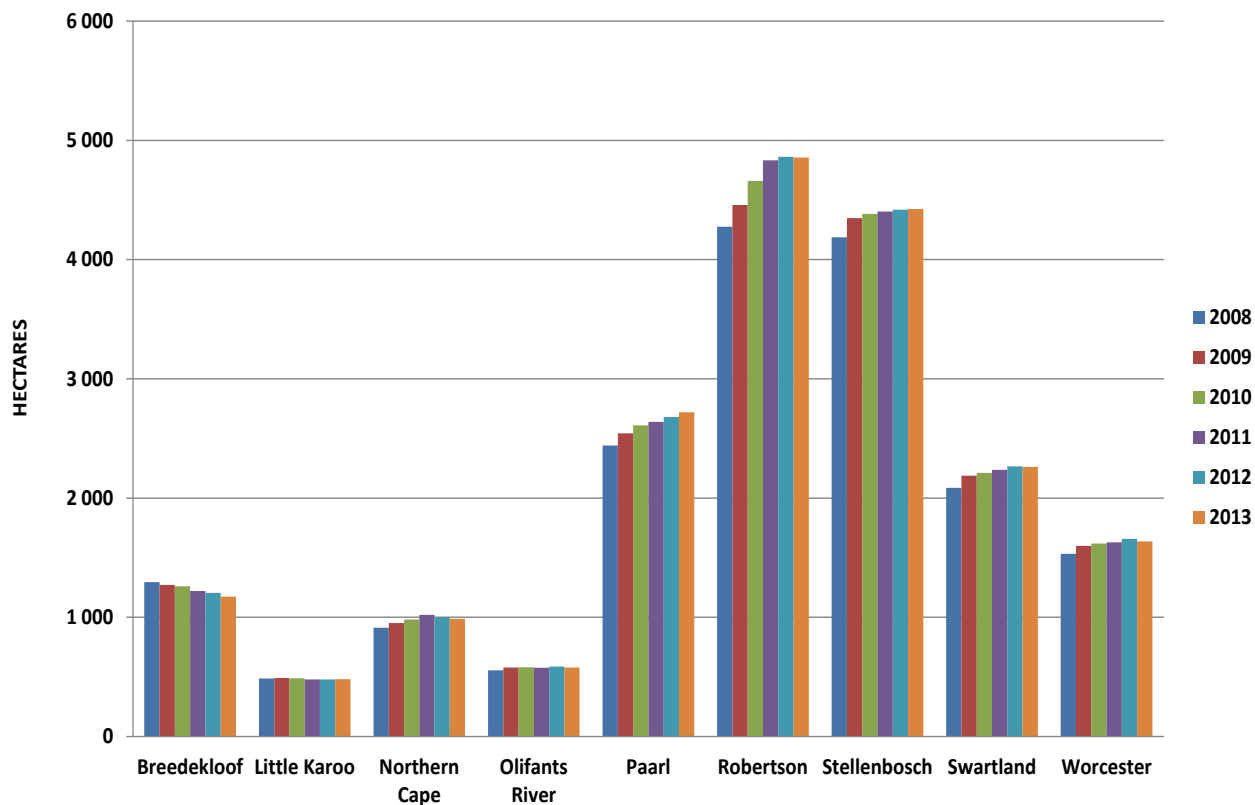
Rootstock 101/14 and Richter 110 occur most frequently in the Paarl, Robertson and Stellenbosch regions. Ramsey occurs most frequently in the Bredekloof, Olifants River, Robertson and Worcester regions.

Ramsey shows a continuous upward trend in all regions except Paarl. Richter 99 occurs most frequently in the Swartland region.



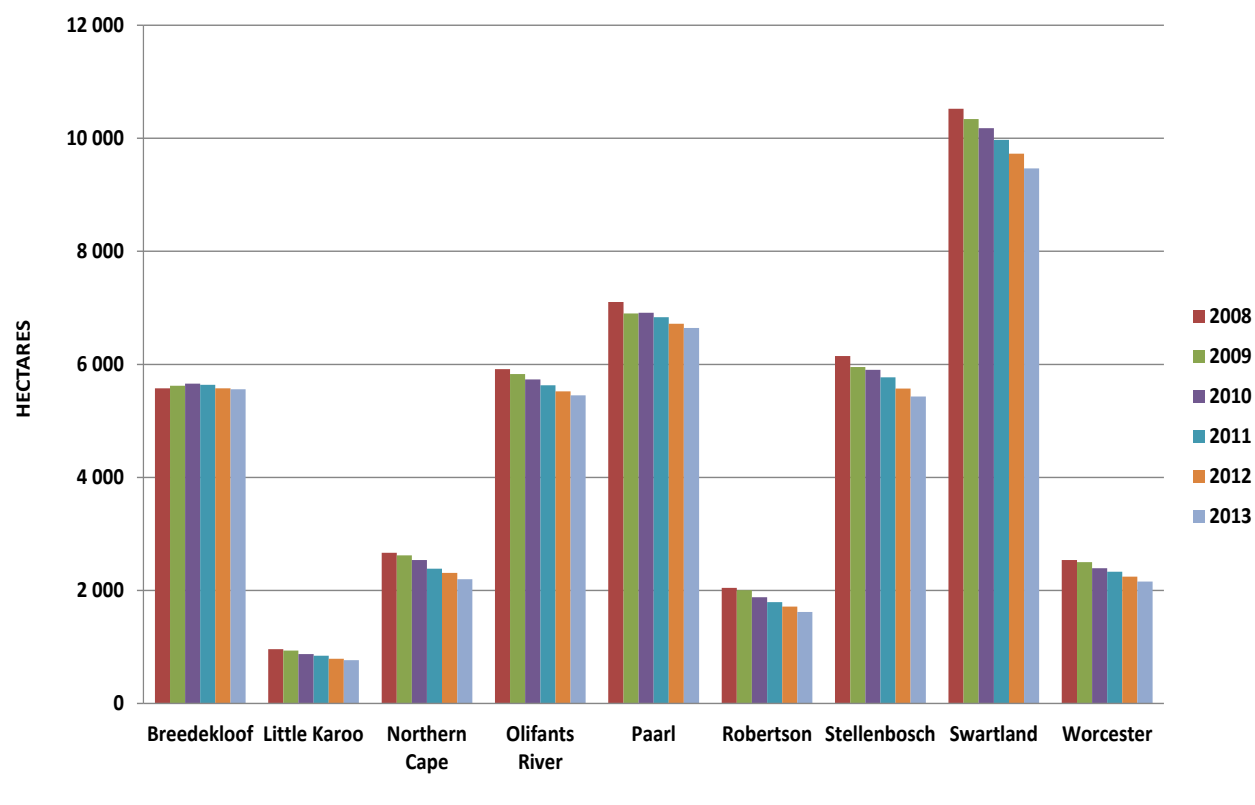
### ROOTSTOCK RICHTER 110 IN WINE REGIONS

19.2% of the total



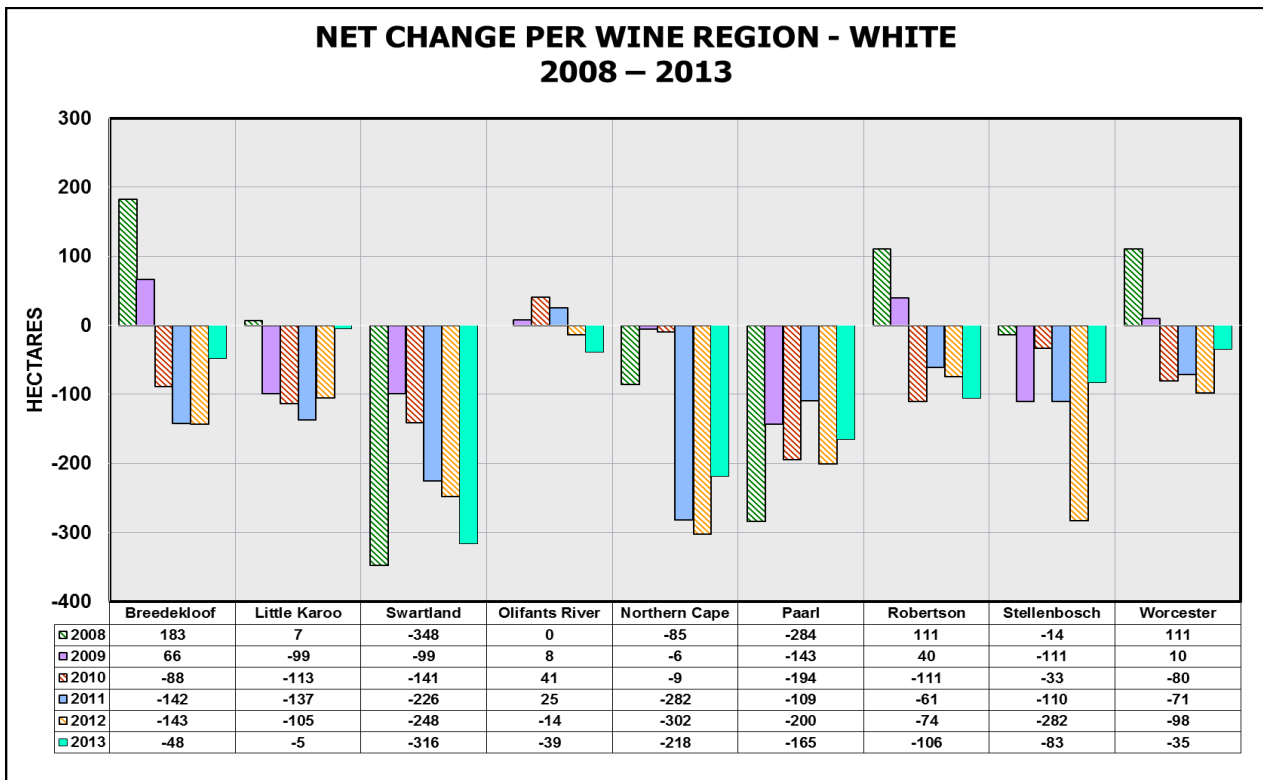
### ROOTSTOCK RICHTER 99 IN WINE REGIONS

39.4% of the total

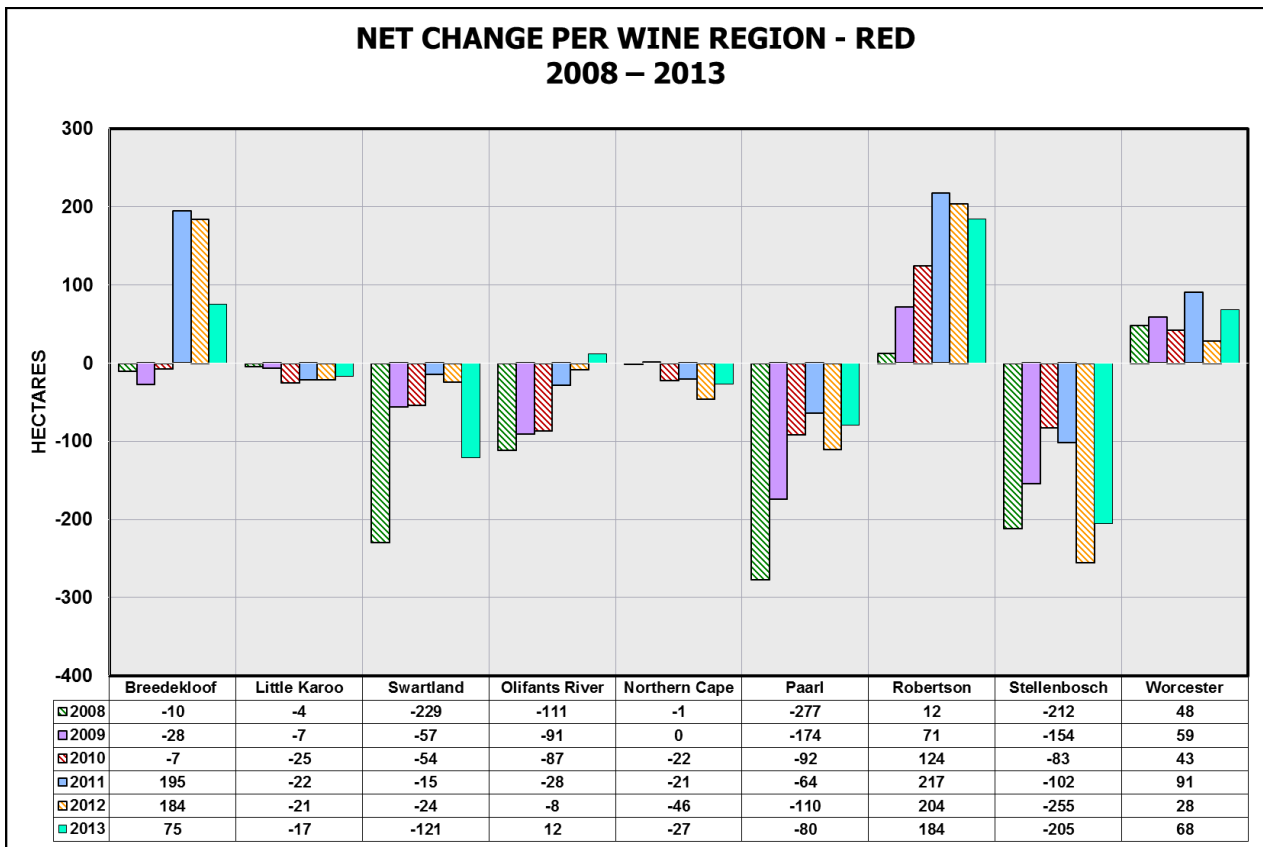


#### 4 Net change of hectares per region

No region constitutes a net increase in white wine plantings. Swartland, Northern Cape and Paarl constitute the largest net decrease.

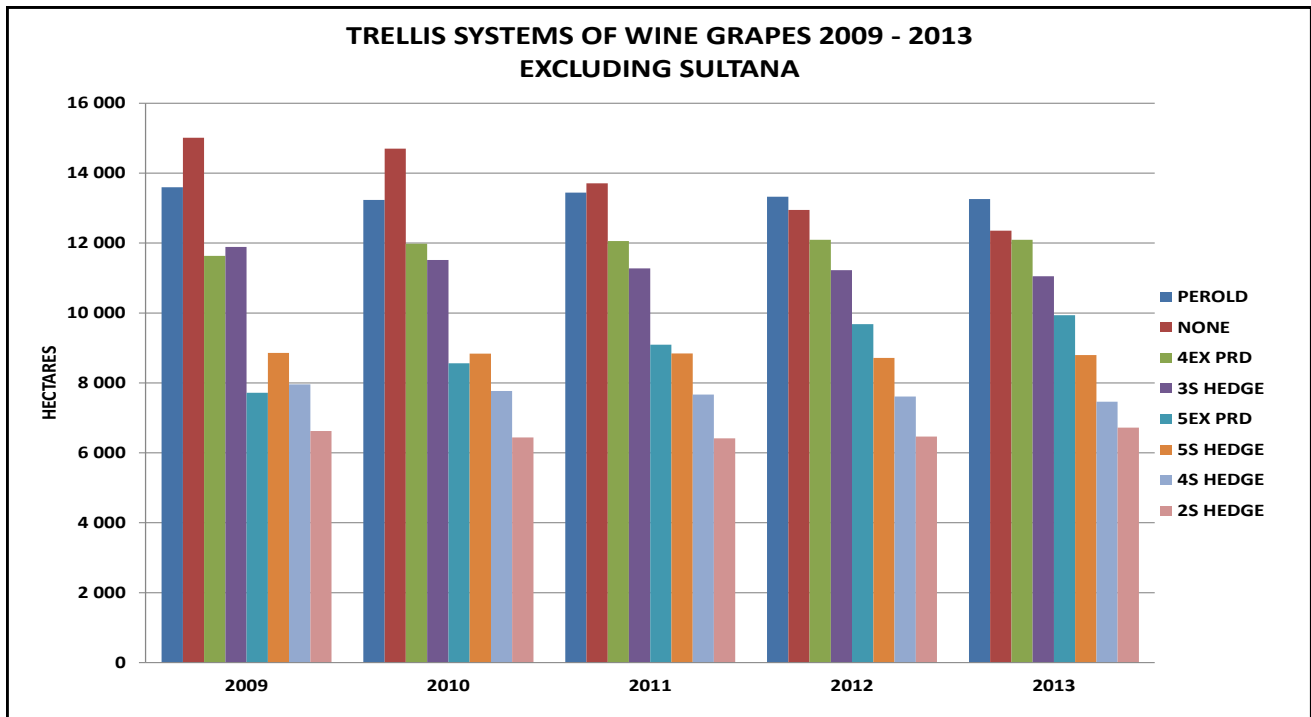


Bredekloof, Robertson and Worcester regions constitute a net increase in red wine plantings, with Swartland, Paarl and Stellenbosch the largest net decrease.



## 5 Trellis Systems

The trellis systems mentioned below constitute almost 70% of all systems in 2013. The Perold Trellis System in general occurs most frequently, followed by the 4-Strand Double Lengthened Perold System.



## 6 Irrigation Methods

The Drip irrigation method continues an upward trend and also occurs most frequently as irrigation method (60.6%), followed by almost unchanged trends of other methods.

