

# Status of Wine-grape Vines as on 31 December 2014

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SAWIS

# Statistics i.r.o. South African wine grape vineyards over the past 10 years (2004 - 2014)

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## 1 Overview

Total hectares for 2014 stand at 99 463 ha compared to 99 680 ha in 2013. This represents a decrease of 217 ha. Until 2006 the total surface showed an annual increase; since then a steady decrease totaling 2 683 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.

For the period 2004–2014 the vineyard area as a percentage of the total area increased in Robertson and Worcester regions, while decreasing in the Paarl, Swartland and Stellenbosch 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 19.1% of the total wine surface in 2004, Colombar 11.2%, Cabernet Sauvignon 13.5%, Pinotage 6.6%, Chardonnay 7.3%, Shiraz 9.4%, Sauvignon blanc 6.9%, followed by the varieties detailed in Table 4. In 2014 Chenin blanc decreased to 18.0%. 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 regions.

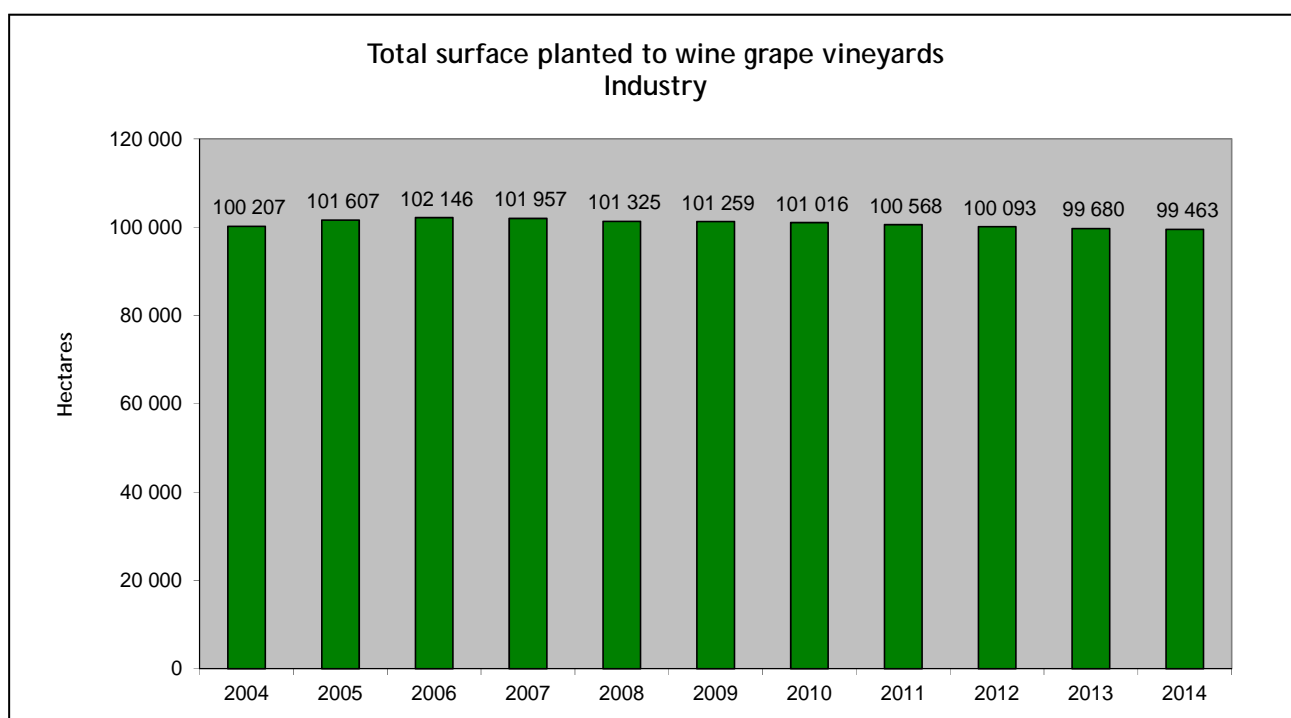


Figure 1: Total surface planted to wine grape vineyards in the industry

NO	VARIETY	2004	2014	NO	VARIETY	2004	2014
1	CHENIN BLANC	19 148.02	17 933.50	55	RAISIN BLANC	162.69	17.42
2	COLOMBAR	11 258.04	11 906.80	56	TINTA AMARELLA	0.91	15.83
3	CABERNET SAUV	13 530.82	11 406.96	57	WYNDRUIF VARIA	18.08	15.00
4	SHIRAZ (SYRAH)	9 414.69	10 410.33	58	MARSANNE	0.00	14.15
5	SAUVIGNON BLNC	6 944.43	9 224.21	59	MEUNIER	4.13	13.86
6	PINOTAGE	6 663.59	7 357.10	60	GAMAY NOIR	28.60	11.07
7	CHARDONNAY	7 283.12	7 356.12	61	MUSCAT OTTONEL	21.65	10.36
8	MERLOT	6 968.54	6 098.24	62	VIDAL BLANC	0.00	10.03
9	RUBY CABERNET	2 648.18	2 364.29	63	PINOT BLANC	29.37	9.70
10	MUSCAT D'ALEXANDRIE	2 825.08	1 947.70	64	GRASA DE COTNARI	0.00	9.03
11	CINSAUT	3 035.35	1 902.75	65	HANEPOOT (RED)	3.14	8.77
12	SEMILLON	1 005.05	1 180.82	66	FLORA	0.25	8.60
13	PINOT NOIR	521.60	1 122.32	67	ALICANTE BSCHT	14.06	8.30
14	VIOGNIER	492.61	868.32	68	CARMENERE	0.00	8.15
15	CABERNET FRANC	932.65	858.42	69	GRACIANO	0.00	7.58
16	MUSCAT DE FRONTIGNAN	640.97	810.27	70	ALVARINHO/ALBARI	0.00	7.47
17	PETIT VERDOT	465.17	772.98	71	KANAAN	49.21	6.75
18	MALBEC	397.87	472.04	72	CINSAUT BLANC	10.96	6.48
19	MATARO (MOURVEDRE)	235.78	449.15	73	WELDRA	24.86	4.79
20	NOUVELLE	74.42	432.06	74	CHAMBOURCIN	0.00	3.88
21	MUSCADEL (RED)	305.02	400.77	75	GRENACHE GRIS	1.24	3.21
22	CROUCHEN	1 236.69	377.70	76	TAMIOSA ROMANEAS	0.00	3.10
23	PINOT GRIS	75.45	352.91	77	TOURIGA FRANCA	3.24	2.57
24	GRENACHE (RED)	59.25	305.07	78	AGIORGITIKO	0.00	2.49
25	VILLARD BLANC	7.17	292.30	79	GRAND NOIR	0.00	2.31
26	CLAIRETTE BLANCHE	429.90	247.04	80	BOURBOULENC	2.45	2.20
27	TINTA BAROCCA	347.36	206.78	81	COLOMINO	6.21	2.10
28	ROOBERNET	135.87	202.85	82	PEDRO LUIS (VALSE PEDRO)	7.66	2.08
29	PALOMINO	627.76	170.39	83	GRACHEN	2.76	1.70
30	WEISSER RIESLING	290.23	164.27	84	CINSAUT GRIS	0.00	1.50
31	UGNI BLANC	83.68	129.28	85	TINTA FRANCISC	0.85	1.39
32	GEWURZTRAMINER	162.15	116.93	86	PONTAK	6.56	1.29
33	CARIGNAN	75.05	112.71	87	VERMINTINO NERO	0.00	1.16
34	TANNAT	22.67	110.30	88	SYLVANER	2.63	1.09
35	TOURIGA NACIONAL	79.04	106.08	89	CORNIFESTO	1.88	0.85
36	FERNAO PIRES	233.30	98.49	90	RIESLING TROLL	0.00	0.81
37	TEMPRANILLO	29.93	82.94	91	NERO D'AVOLA	0.00	0.61
38	THERONA	132.49	81.30	92	SEMILLON (RED)	0.00	0.59
39	GRENACHE BLANC	26.21	77.19	93	MACABEU	0.00	0.20
40	SANGIOVESE	56.69	71.09	94	BEOGRADSKA CRNA	0.00	0.15
41	EMERALD RIESLING	224.45	68.27	95	SEYVAL BLANC	0.00	0.12
42	BUKETTRAUBE	195.34	68.04	96	BAST CASTELLO	0.03	0.03
43	MORIO MUSCAT	21.13	62.76	97	KEUKA	0.00	0.00
44	ROUSSANNE	2.47	58.37	98	PERRICONE	0.01	0.00
45	VERDELHO	6.60	58.12	99	KERNER	6.19	0.00
46	CHENEL	163.33	57.18	100	FURMINT	5.77	0.00
47	DURIF	1.37	53.67	101	VITAL	0.25	0.00
48	SOUZAO	41.82	44.60	102	FOLLET	0.25	0.00
49	BARBERA	39.40	44.42	103	SCHONBURGER	0.32	0.00
50	PORTSOORTE	7.18	32.36	104	CSERSZEGI FUSZ	0.00	0.00
51	IRSAY OLIVIER	0.00	32.05	105	BRAKBOSEILAND	0.75	0.00
52	ZINFANDEL	35.88	29.53	106	OLASZ	0.00	0.00
53	HARSLEVELU	129.92	24.27	107	AUXERROIS	3.70	0.00
54	NEBBIOLO	15.67	20.29		TOTAL	100 207.11	99 463.47

Table 1: Plantings of selected wine grape varieties for 2004 and 2014



District	2004		2014	
	% of total	Ha	% of total	Ha
Little Karoo	3%	2 976	3%	2 660
Northern Cape	5%	4 761	5%	4 659
Olifants River	10%	9 746	10%	10 149
Robertson	13%	13 014	15%	14 652
Swartland	15%	15 277	14%	13 591
Paarl	18%	18 185	16%	15 835
Stellenbosch	17%	17 376	16%	16 037
Worcester	7%	7 165	9%	8 858
Breedekloof	12%	11 706	12%	13 022
<b>Total</b>	<b>100%</b>	<b>100 207</b>	<b>100%</b>	<b>99 463</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 (2004 - 2014)

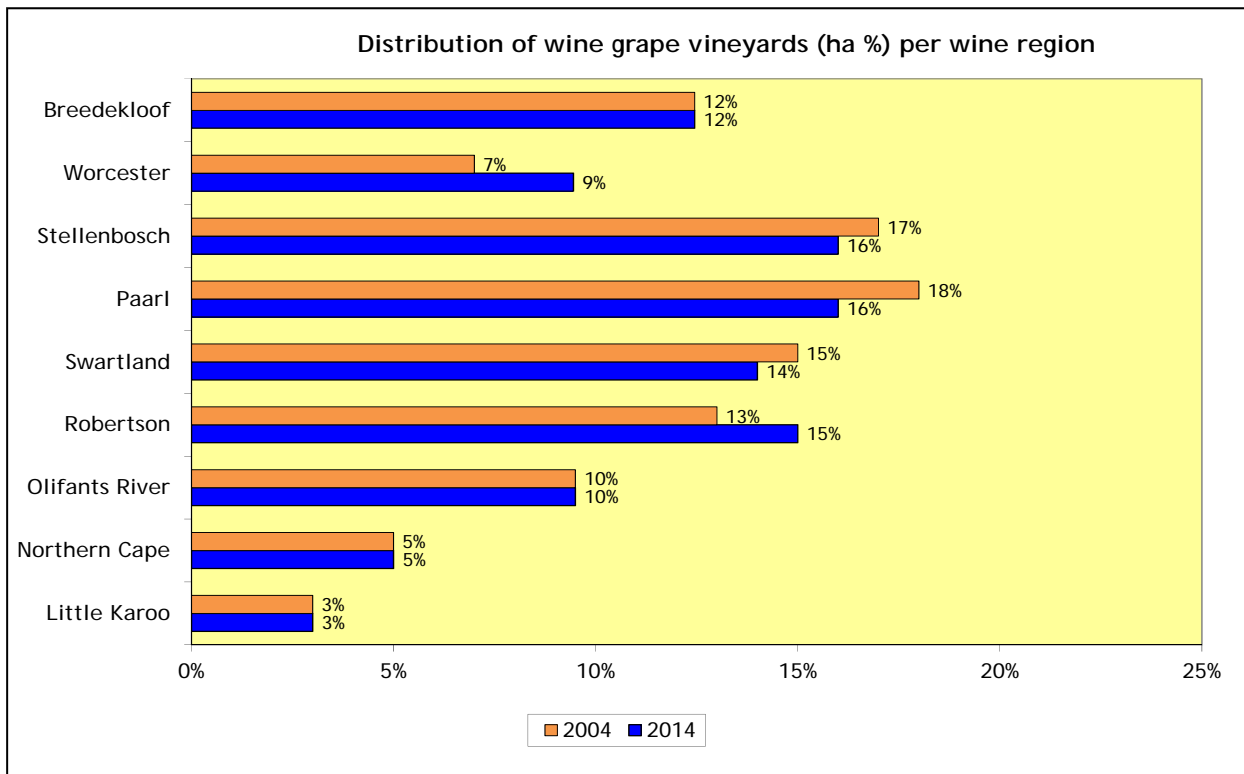


Figure 2: Distribution of wine grape vineyards as a percentage (%) per wine region (2014)

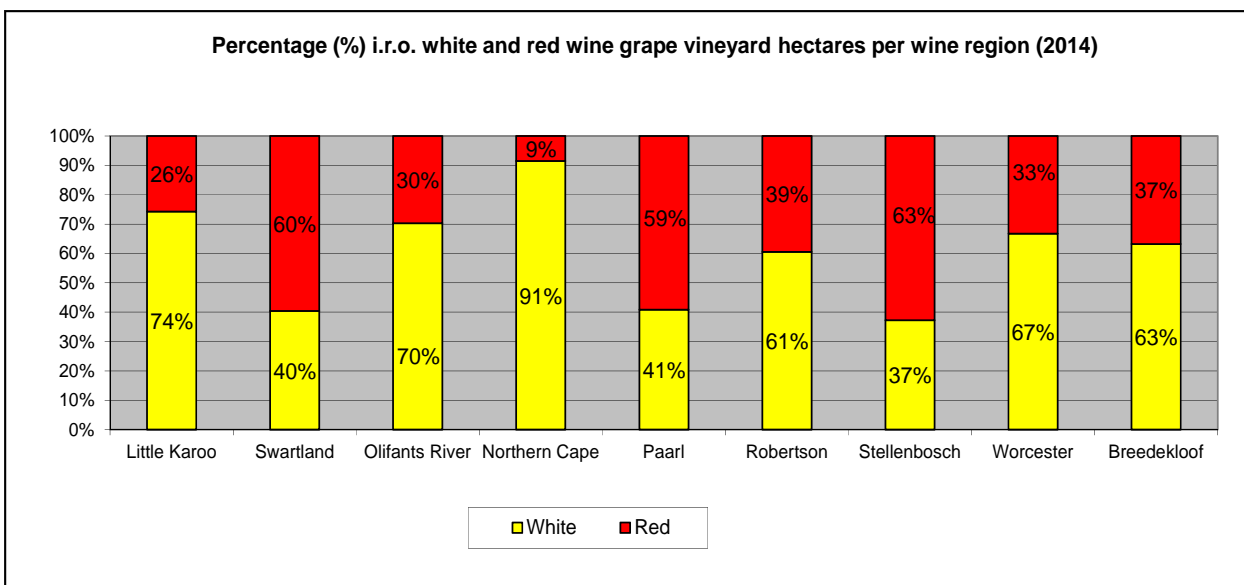


Figure 3: Percentage (%) white and red wine grape vineyard hectares per wine region (2014)

District	2004		2014	
	Red (ha)	White (ha)	Red (ha)	White (ha)
Little Karoo	25%	75%	26%	74%
Swartland	55%	45%	60%	40%
Olifants River	35%	65%	30%	70%
Northern Cape	11%	89%	9%	91%
Paarl	57%	43%	59%	41%
Robertson	36%	64%	39%	61%
Stellenbosch	66%	34%	63%	37%
Worcester	31%	69%	33%	67%
Breedekloof	36%	64%	37%	63%
<b>Total</b>	<b>46%</b>	<b>54%</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 (2004 and 2014)

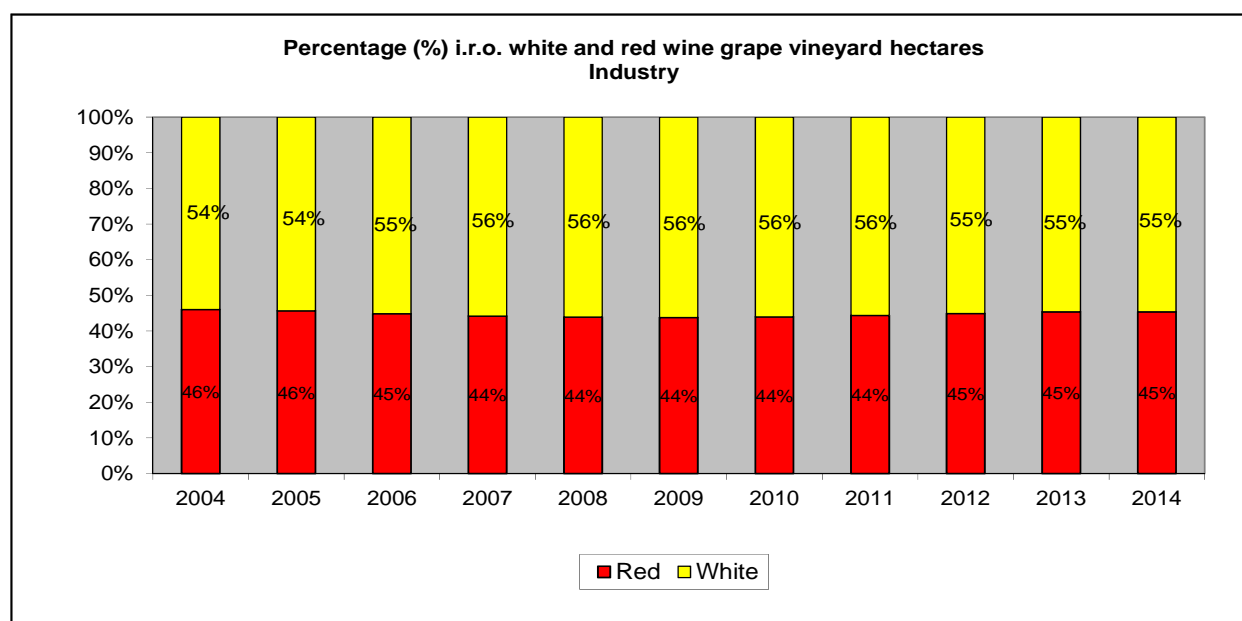


Figure 4: Percentage (%) white and red wine grape vineyard hectares

Variety	2004		2014		Change since 2004 (Ha)
	Hectares	% of total	Hectares	% of total	
Chenin blanc	19 148	19.1%	17 934	18.0%	-1 215
Cabernet Sauvignon	13 531	13.5%	11 407	11.5%	-2 124
Colombar	11 258	11.2%	11 907	12.0%	649
Shiraz (Syrah)	9 415	9.4%	10 410	10.5%	996
Sauvignon blanc	6 944	6.9%	9 224	9.3%	2 280
Chardonnay	7 283	7.3%	7 356	7.4%	73
Merlot	6 969	7.0%	6 098	6.1%	-870
Pinotage	6 664	6.6%	7 357	7.4%	694
Ruby Cabernet	2 648	2.6%	2 364	2.4%	-284
Muscat d'Alexandrie	2 825	2.8%	1 948	2.0%	-877
Cinsaut	3 035	3.0%	1 903	1.9%	-1 133
Crouchen (Cape Riesling)	1 237	1.2%	378	0.4%	-859
Palomino	628	0.6%	170	0.2%	-457
Other	8 623	8.6%	11 007	11.1%	2 385
<b>Total</b>	<b>100 207</b>	<b>100%</b>	<b>99 463</b>	<b>100%</b>	<b>-744</b>

Table 4: Surface i.r.o. most planted varieties in the industry (2004 and 2014)

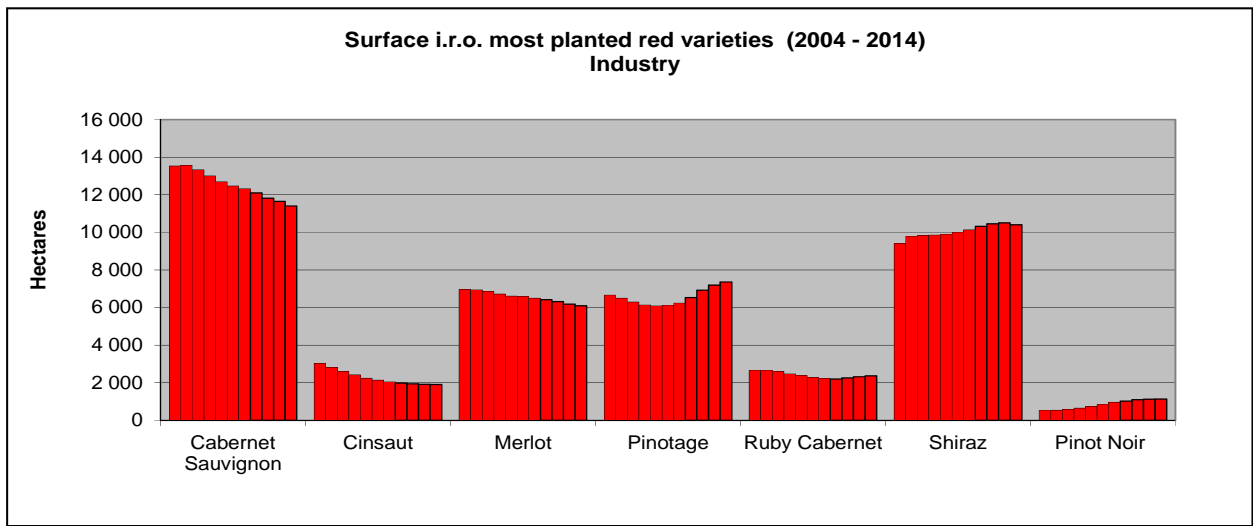


Figure 5: Surface i.r.o. most planted red varieties in the industry (2004 - 2014)

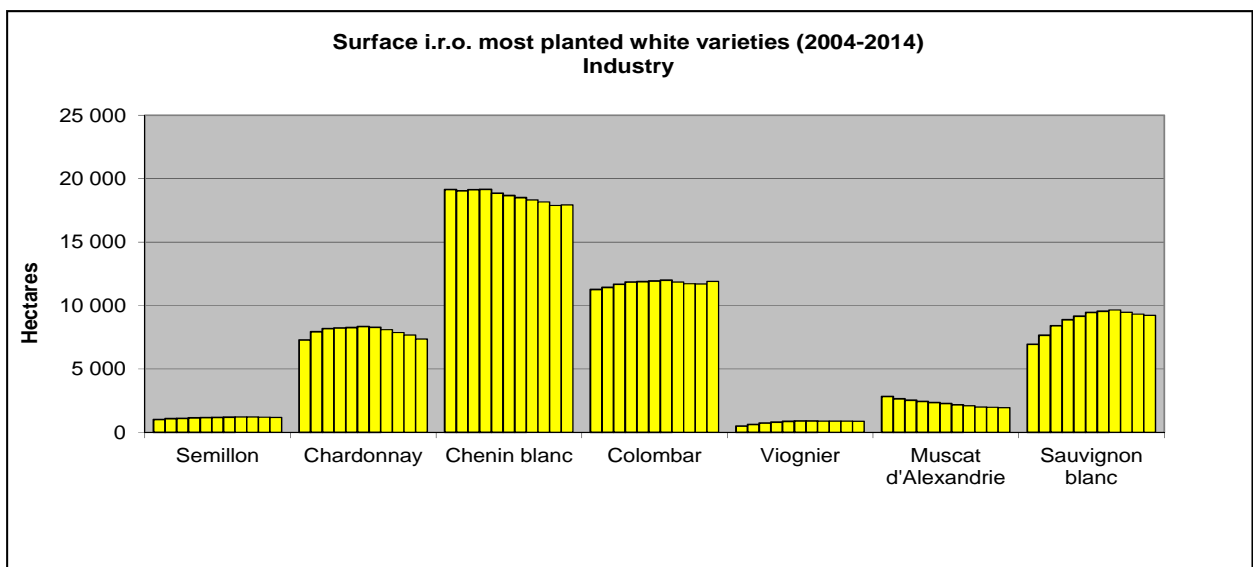


Figure 6: Surface i.r.o. most planted white varieties in the industry (2004 - 2014)

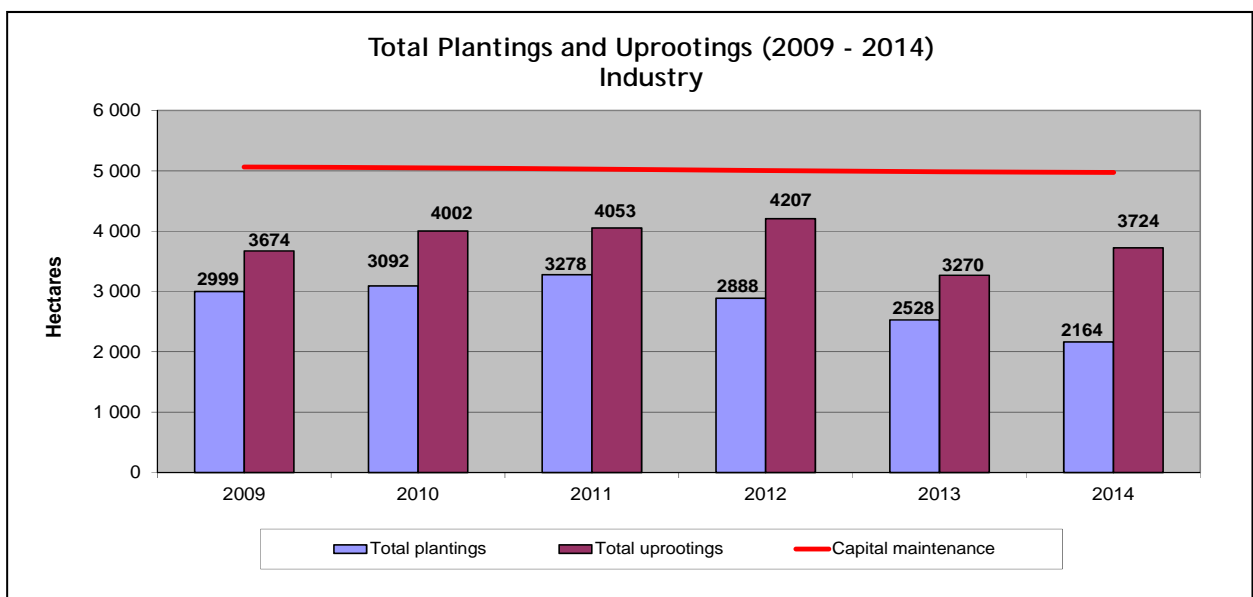


Figure 7: Plantings and uprooting i.r.o. red and white grape vineyards in the industry (2009 - 2014)

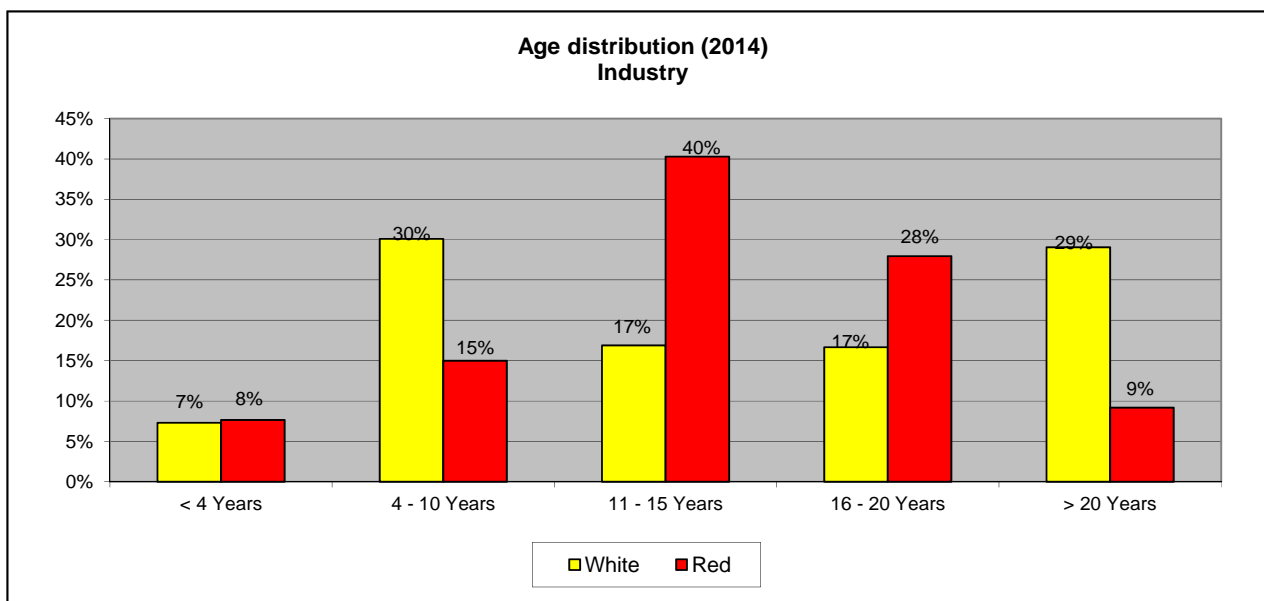


Figure 8: Age distribution of white and red wine grape vineyards (2014)

AGE OF VINES	HECTARES IN WINE REGION AS % OF TOTAL									
	TOTAL HECTARES	NORTHERN CAPE	OLIFANTS RIVER	SWART-LAND	LITTLE KAROO	PAARL	ROBERTSON	STELLENBOSCH	WORCESTER	BREEDKLOOF
< 4 Years	7.3	2.0	6.6	6.1	9.0	5.5	10.4	4.2	10.8	8.9
4 - 10 Years	30.1	25.2	26.6	23.8	30.2	24.9	35.0	28.0	39.3	33.4
11 - 15 Years	16.9	14.7	15.1	19.6	15.9	18.4	17.3	19.0	17.4	14.4
16 - 20 Years	16.7	37.7	16.5	15.4	17.1	13.0	14.8	13.9	13.3	16.0
> 20 Years	29.1	20.4	35.1	35.0	27.9	38.1	22.5	35.0	19.2	27.3
<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	7.6	3.7	8.0	6.0	6.3	5.9	13.3	3.5	12.2	13.1
4 - 10 Years	15.0	25.6	10.0	10.0	19.0	13.6	19.9	14.2	27.1	16.0
11 - 15 Years	40.3	25.3	38.9	40.4	41.0	44.9	33.7	43.3	36.1	37.1
16 - 20 Years	27.9	36.4	37.3	34.4	24.4	25.8	27.5	24.6	19.9	27.7
> 20 Years	9.2	9.0	5.8	9.2	9.4	9.8	5.5	14.5	4.7	6.1
<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>

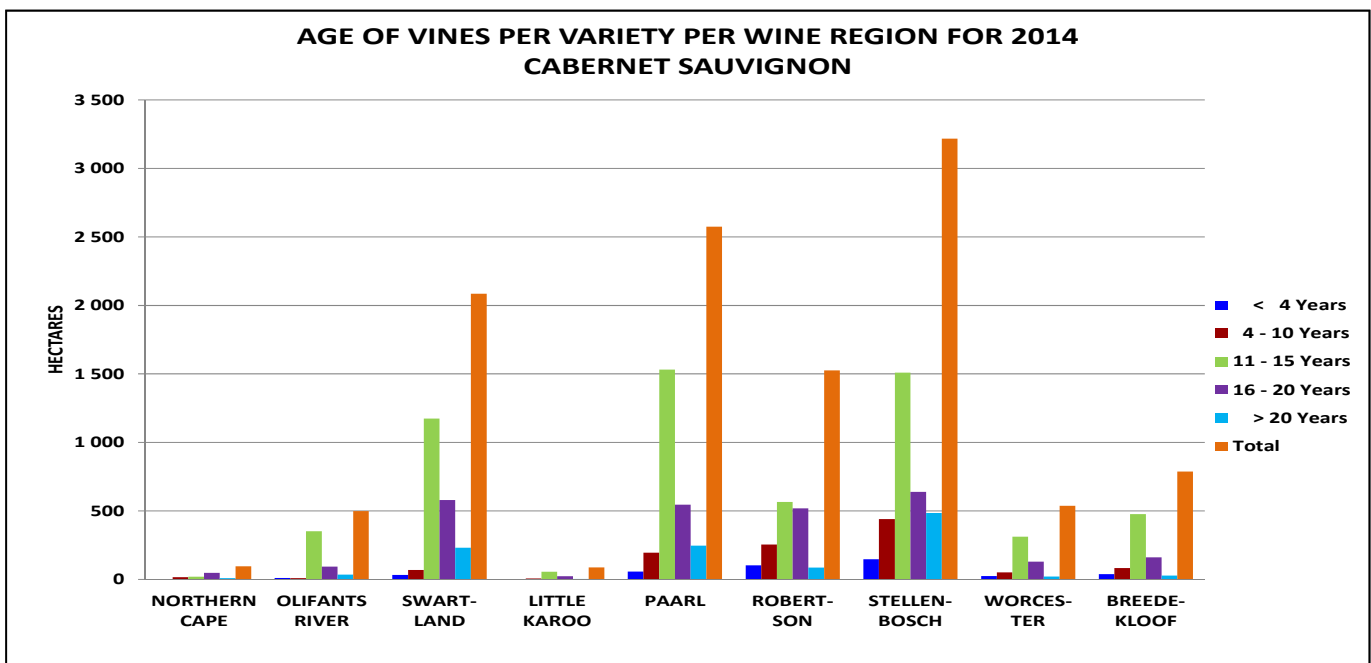
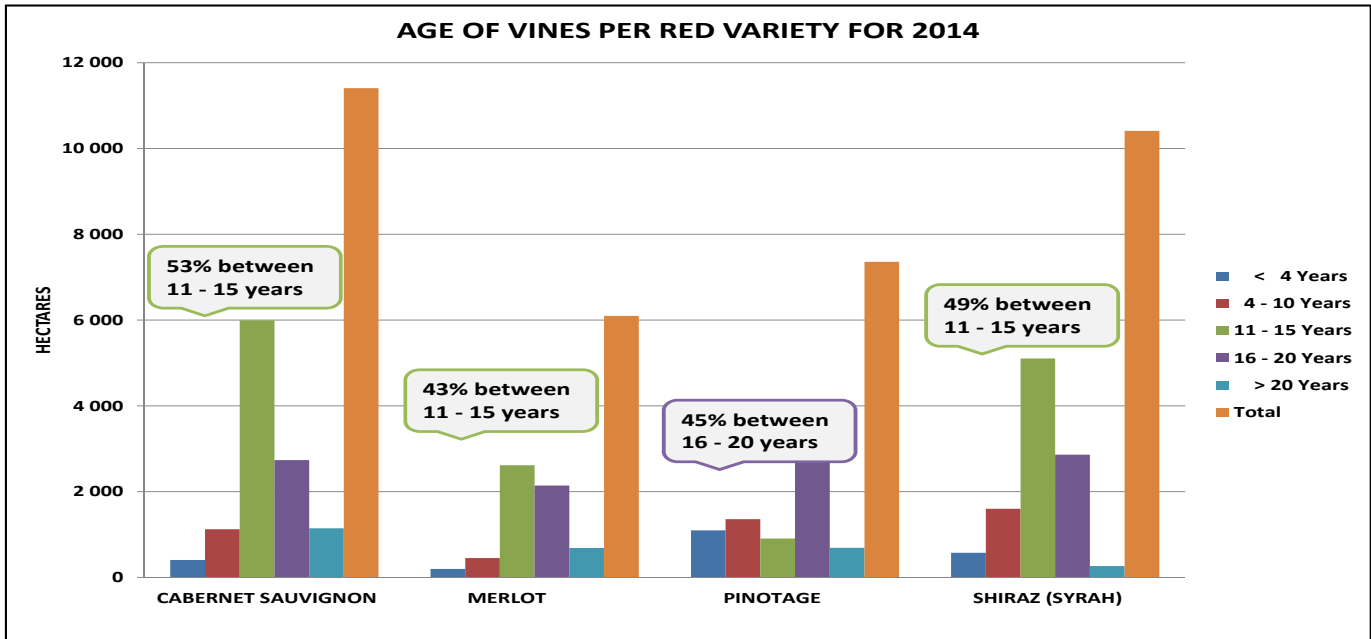
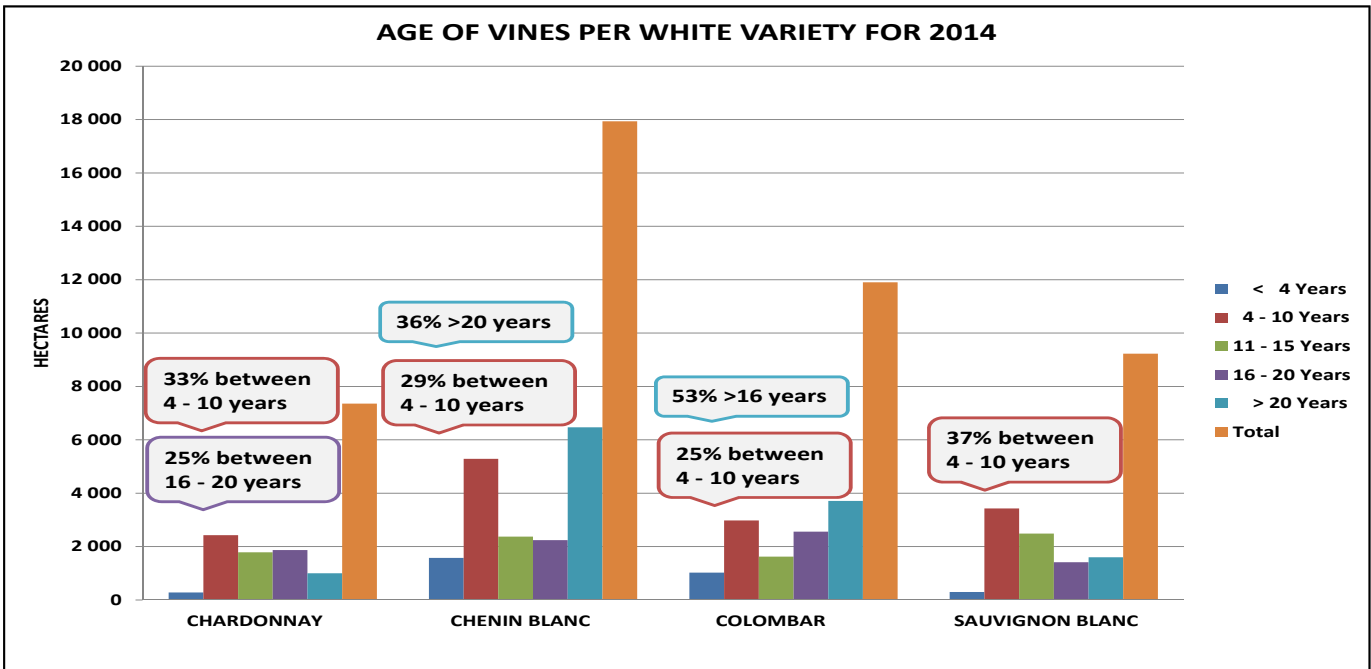
Table 5: Age distribution of vines per region per variety group for 2014 - % (Excluding Sultana)

### Age Distribution per Variety

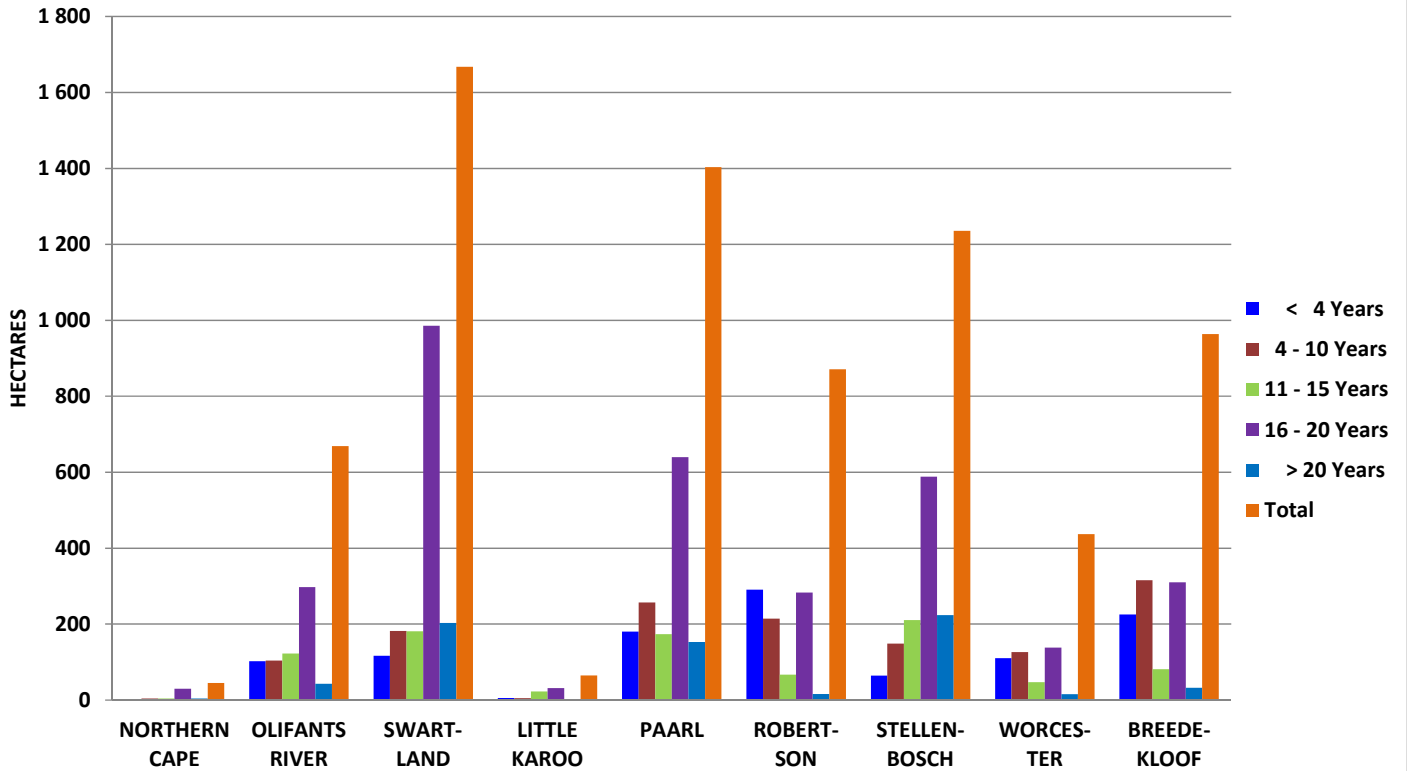
Figure 9 depicts the age distribution of selected varieties per wine region. The predominant age of Pinotage is 16 - 20 years, followed by Cabernet Sauvignon, Merlot and Shiraz with 11 - 15 years. Regarding white varieties Sauvignon blanc and Chardonnay lead with 4 - 10 years, followed by Chenin blanc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

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

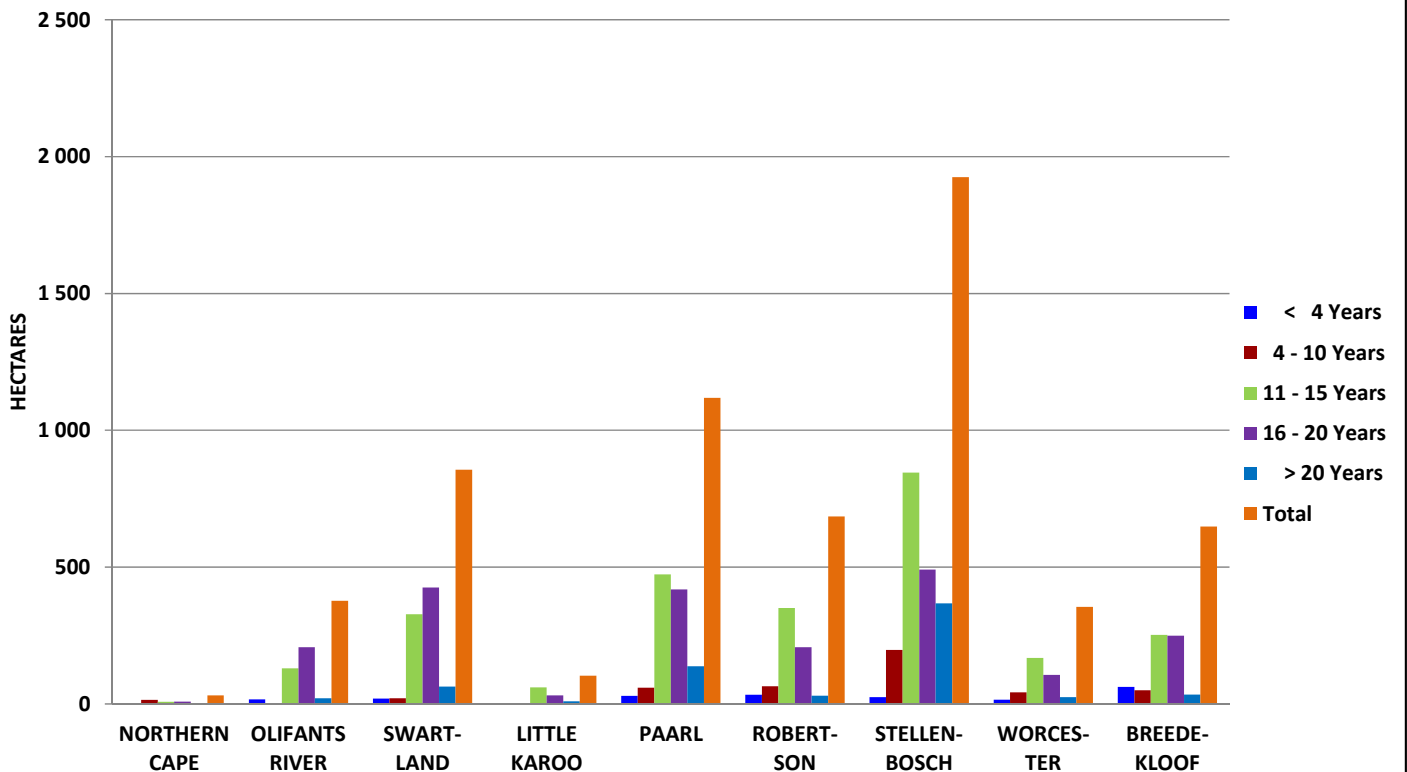




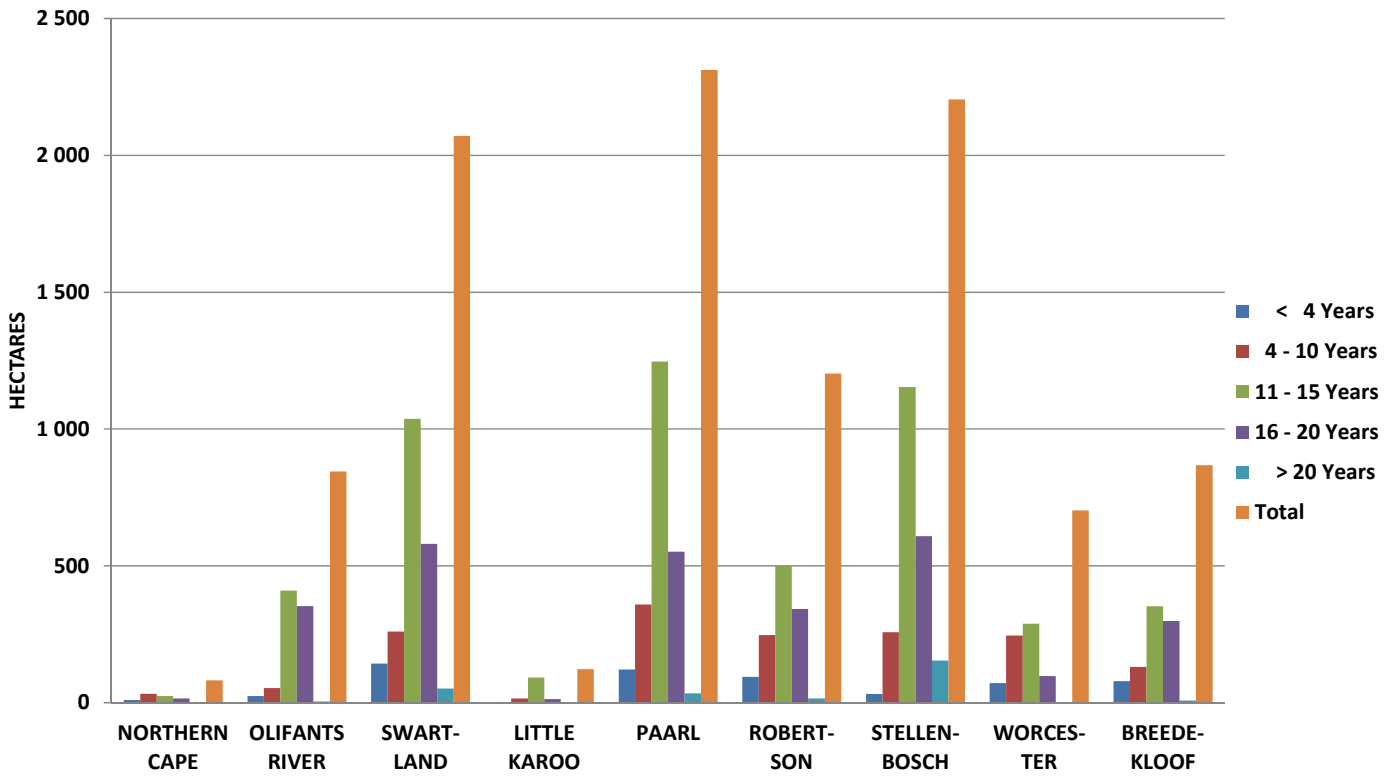
### AGE OF VINES PER VARIETY PER WINE REGION FOR 2014 PINOTAGE



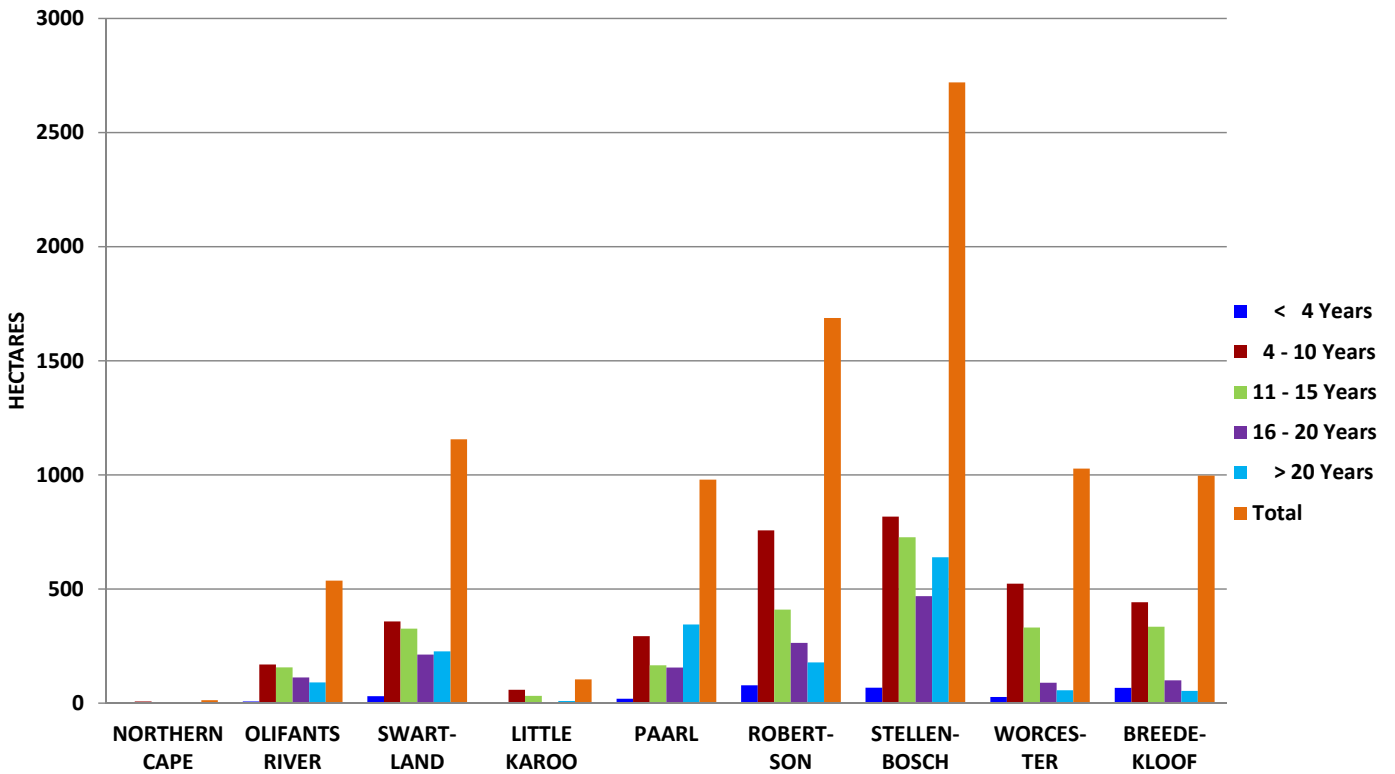
### AGE OF VINES PER VARIETY PER WINE REGION FOR 2014 MERLOT



### AGE OF VINES PER VARIETY PER WINE REGION FOR 2014 SHIRAZ (SYRAH)



### AGE OF VINES PER VARIETY PER WINE REGION FOR 2014 SAUVIGNON BLANC



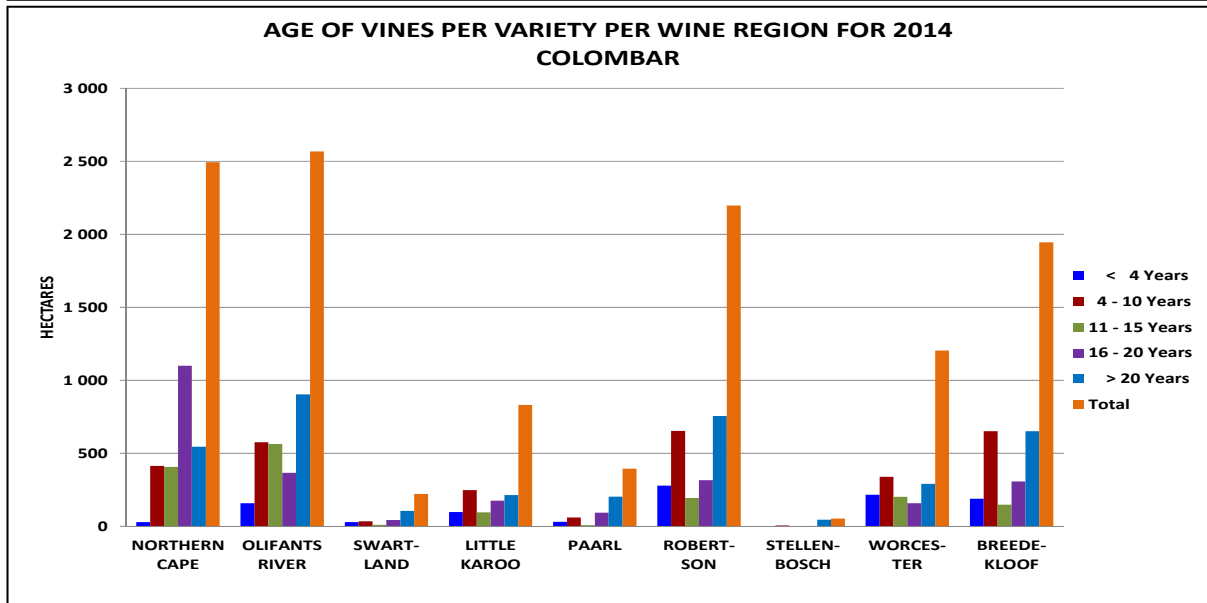
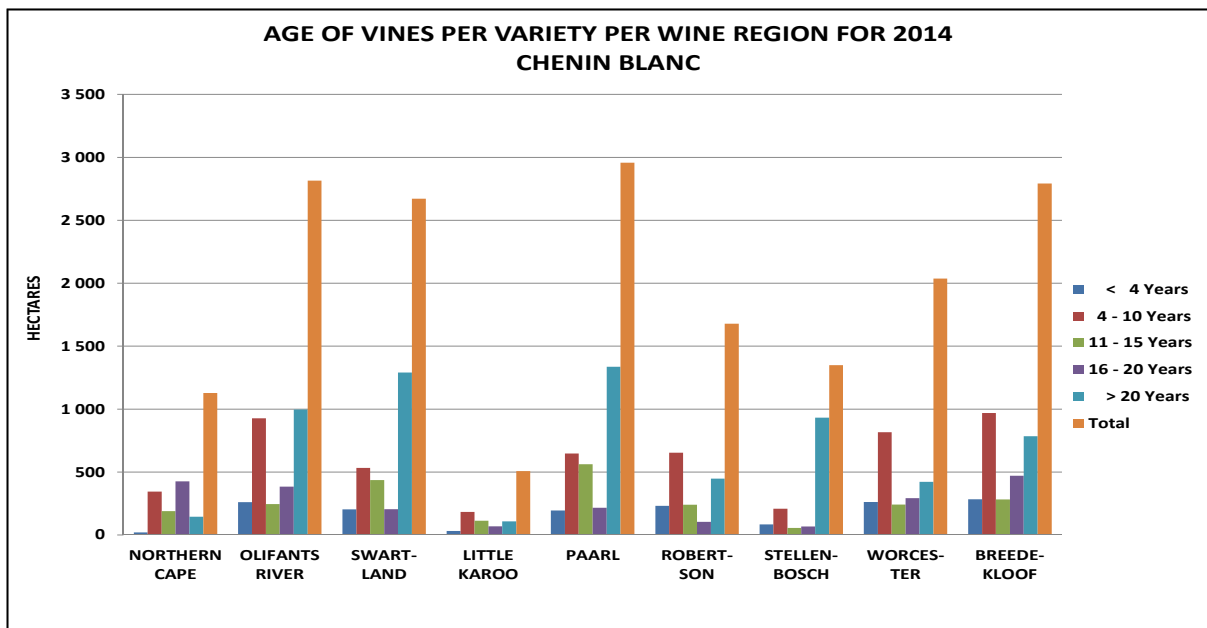
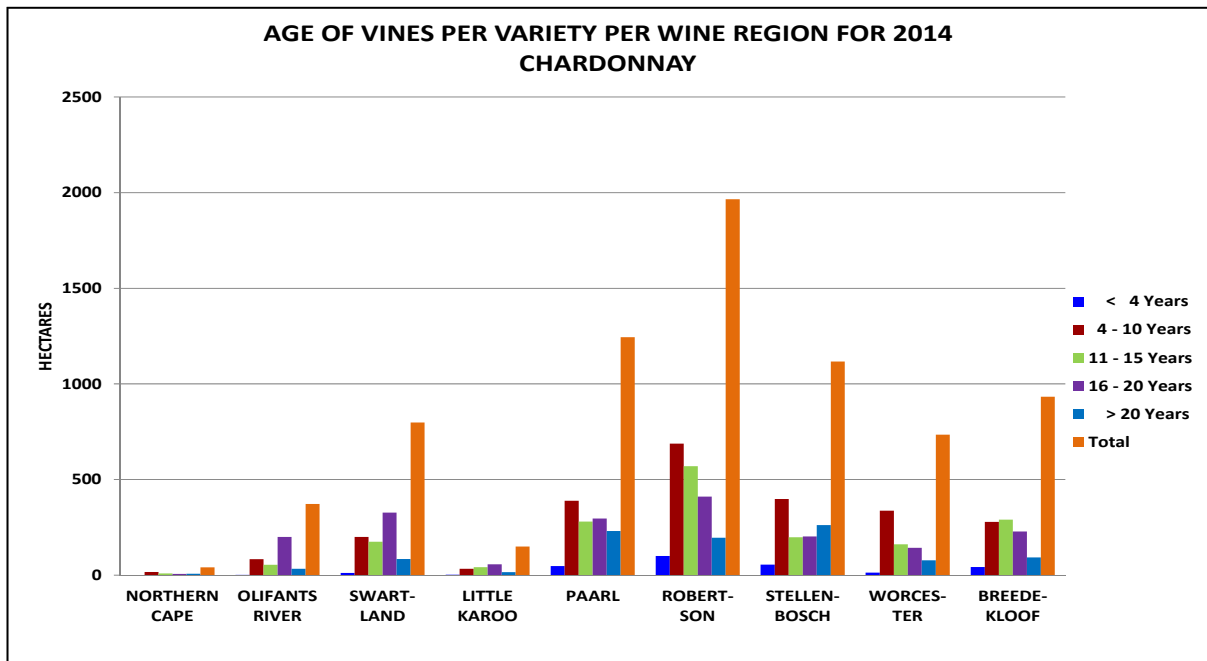


Figure 9: Age of vines per variety per wine region for 2014

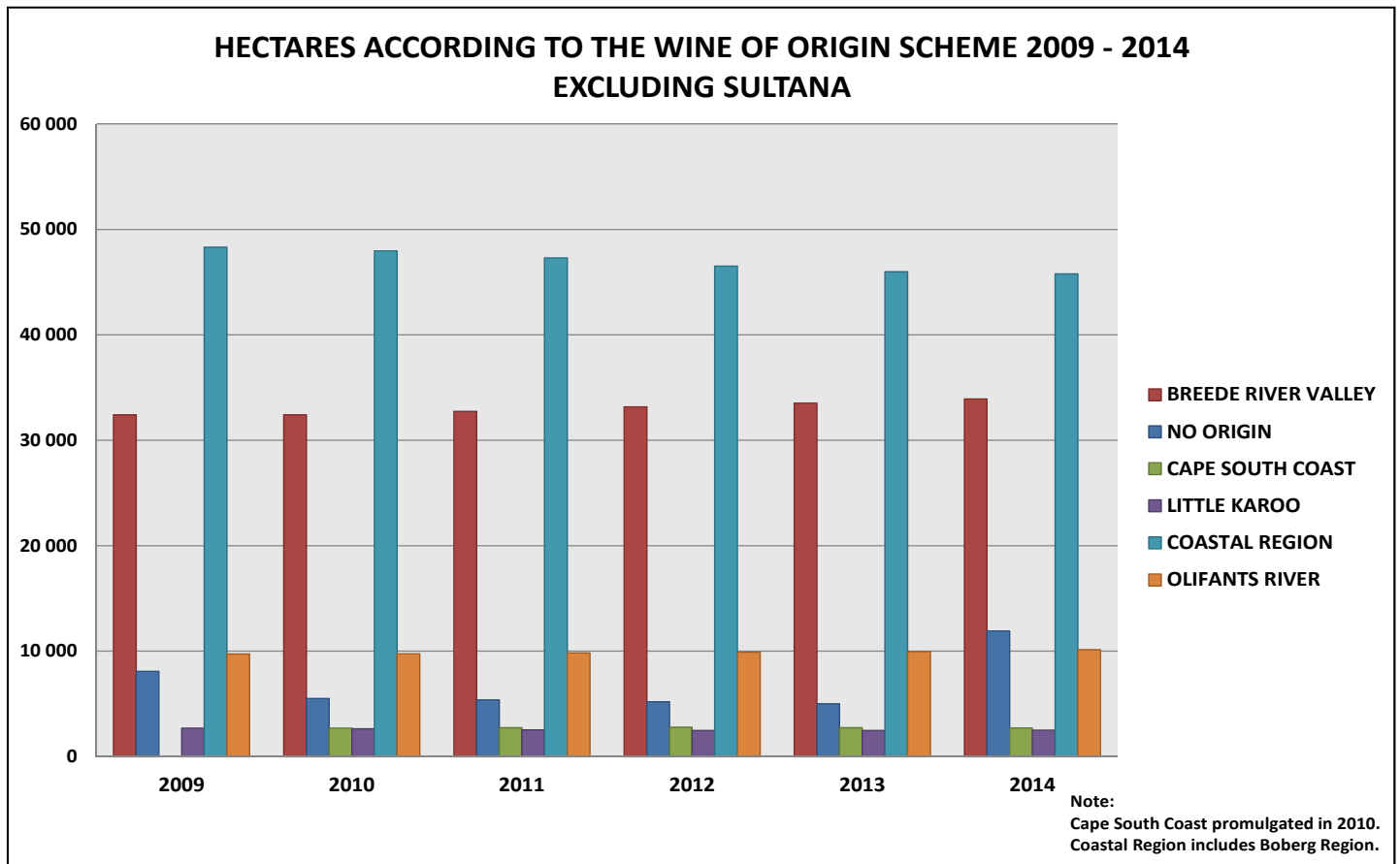
## Replacement of wine-grape vines

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	4 973.2	133.0	679.6	507.5	233.0	791.8	732.6	801.9	442.9	651.1
Actual planted	2 163.5	98.2	149.1	207.6	41.5	207.4	486.7	179.8	369.1	424.1

Table 6: Replacement per hectares per wine region at an annual rate of 5% - 2014 (Excluding Sultana)

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

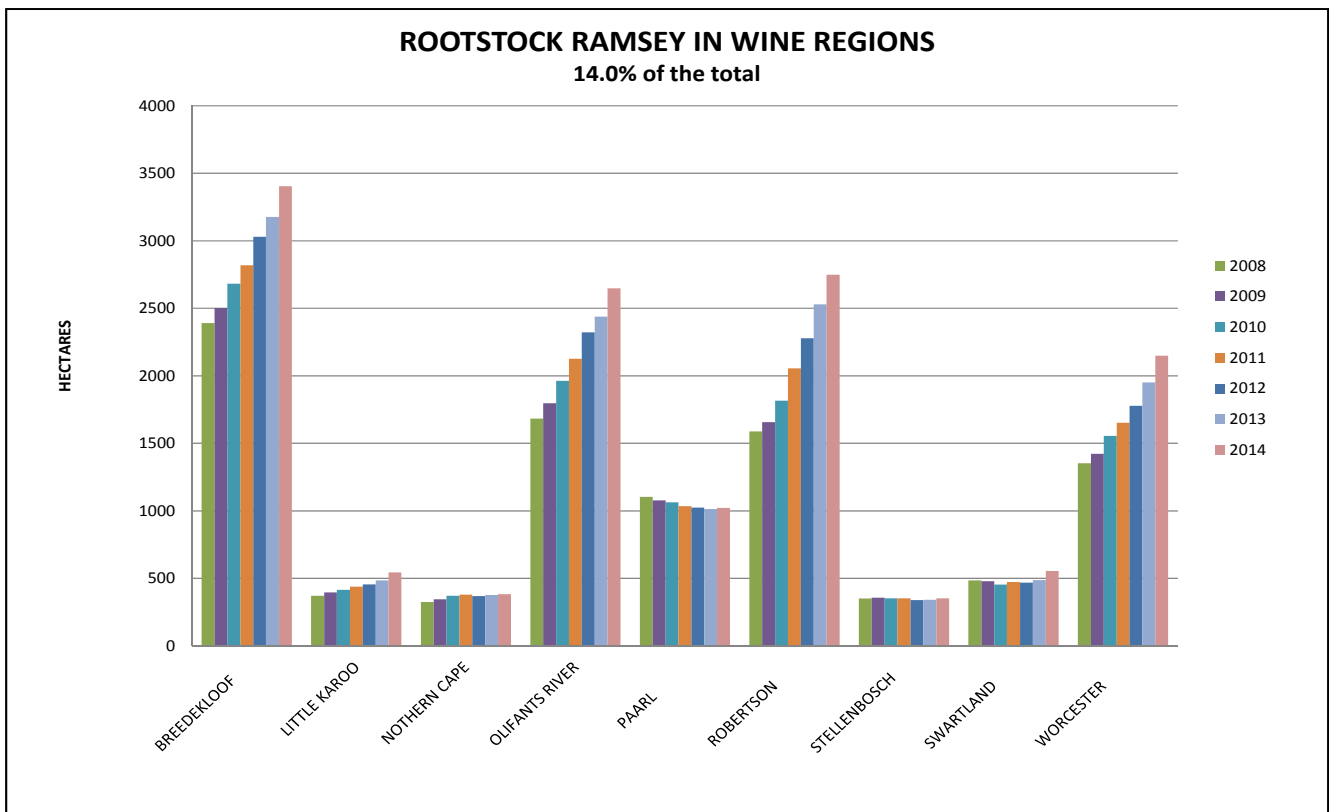
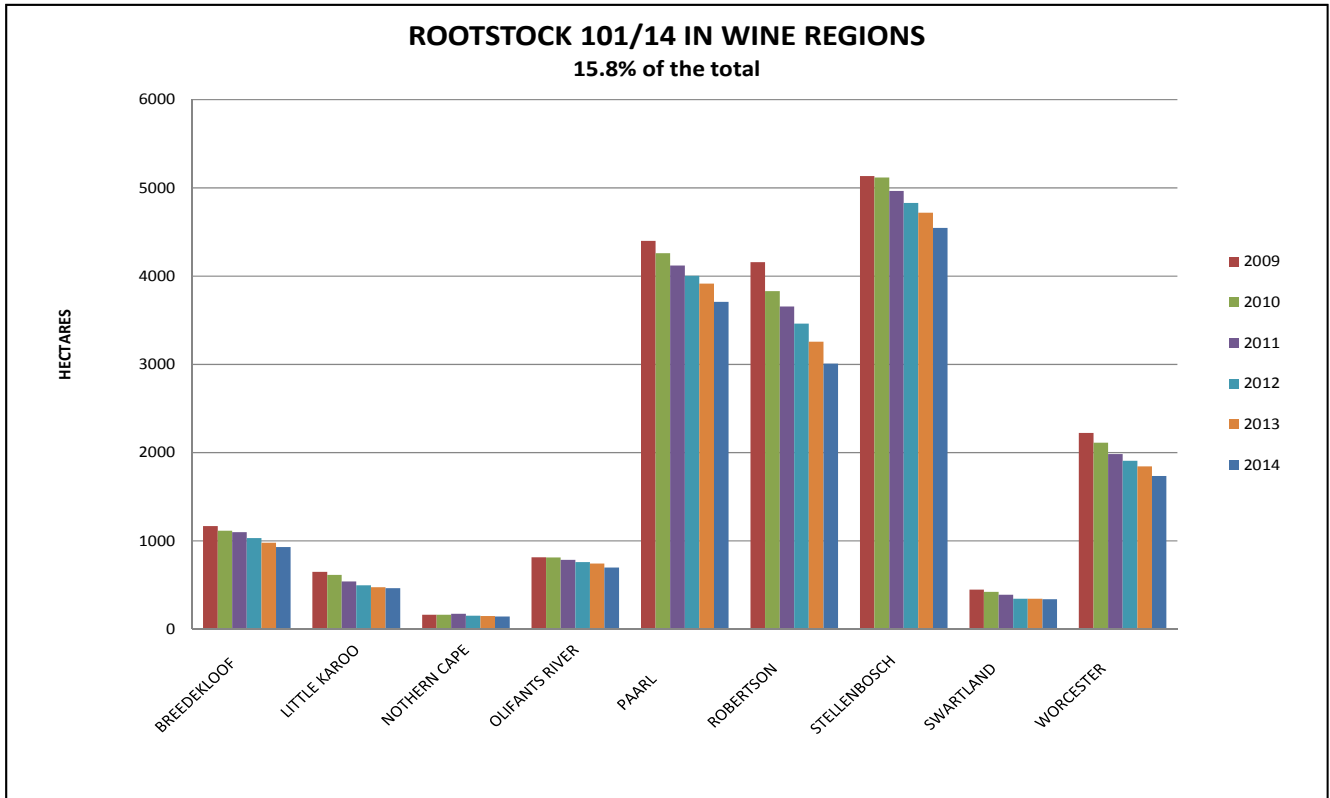


### 3 Rootstock

The rootstock mentioned below constitutes 88% of the total rootstock in the industry in 2014.

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.

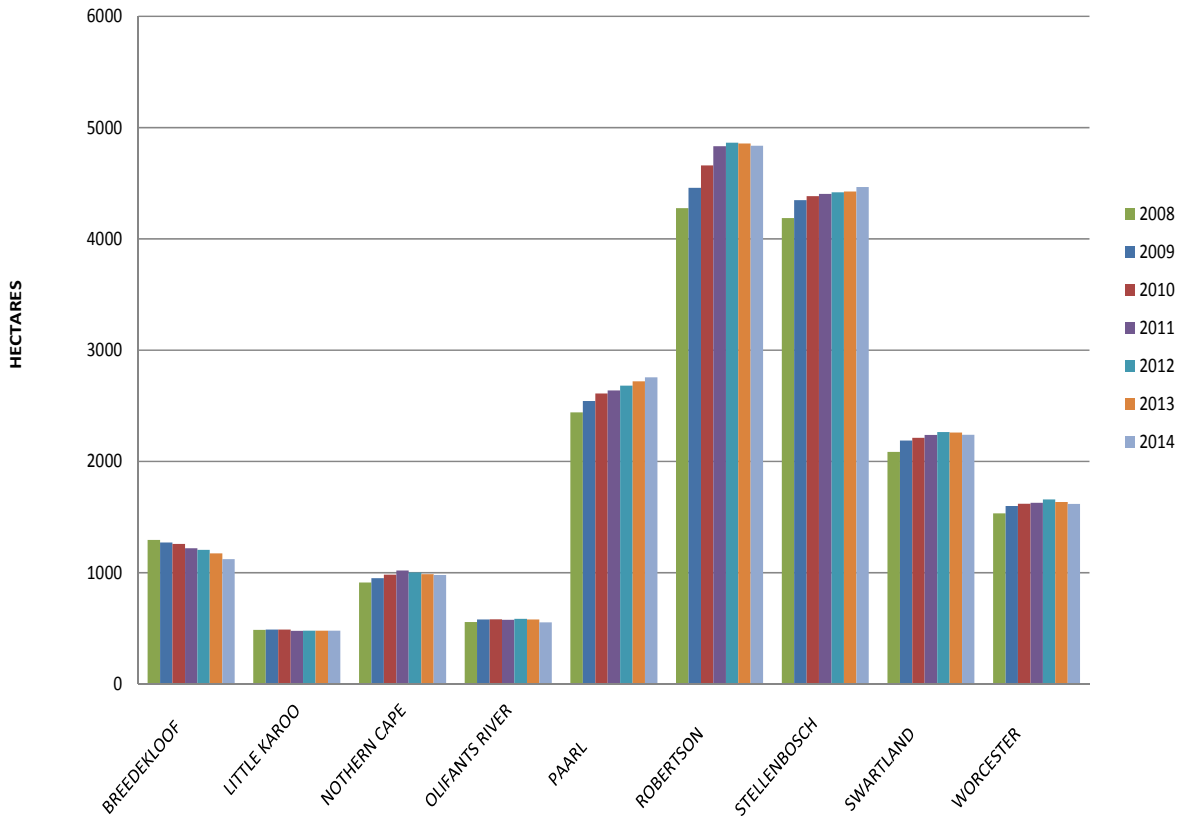
Ramsey shows a continuous upward trend in all regions except Paarl. Richter 99 occurs most frequently in the Swartland region.





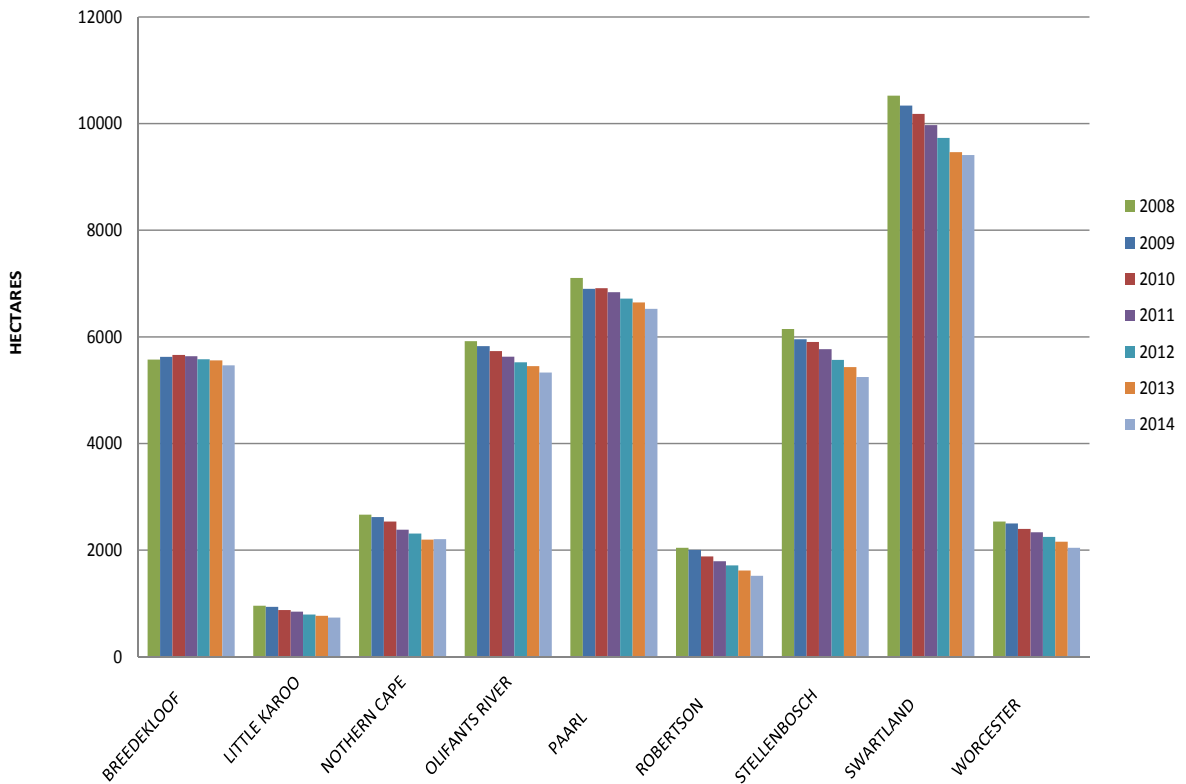
### ROOTSTOCK RICHTER 110 IN WINE REGIONS

19.3% of the total



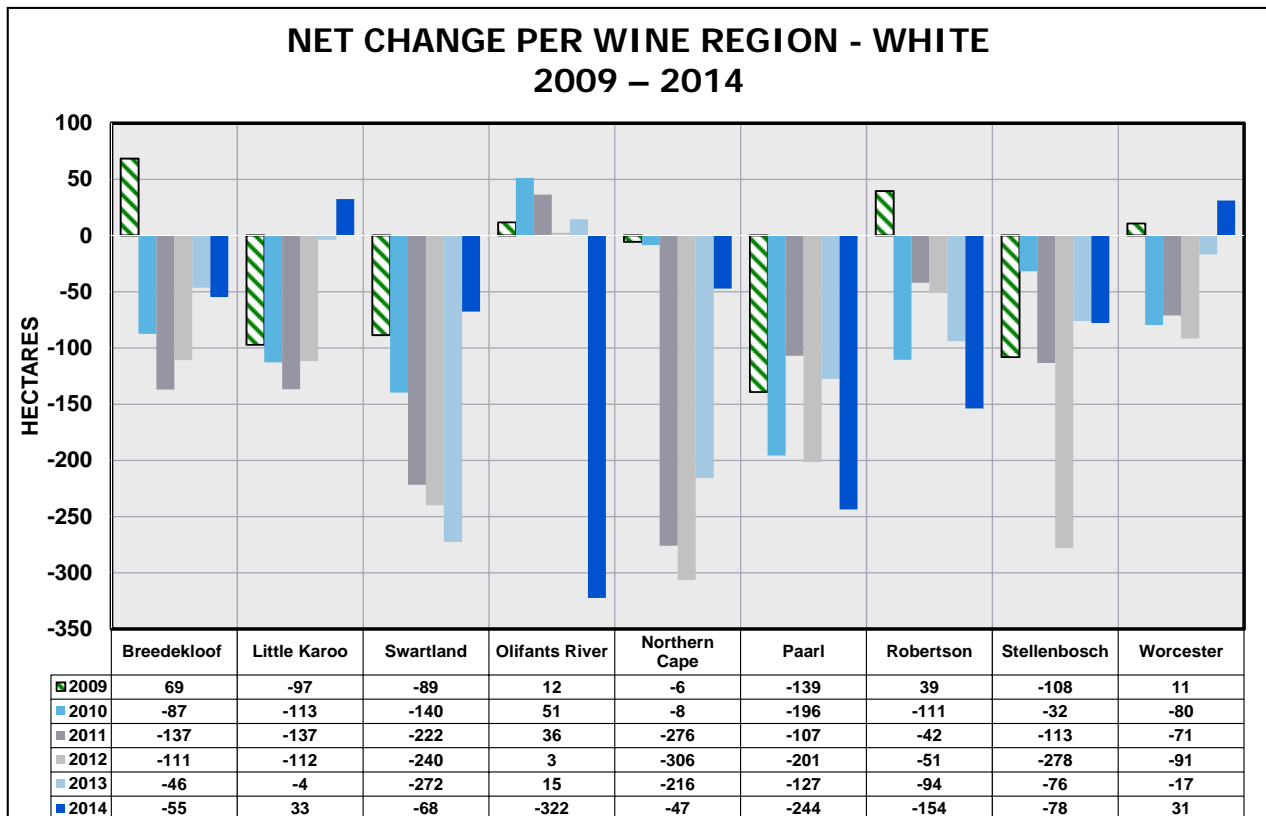
### ROOTSTOCK RICHTER 99 IN WINE REGIONS

39.0% of the total



#### 4 Net change of hectares per region

Worcester and Little Karoo regions constitute a net increase in red wine plantings, with Olifants River, Paarl and Robertson the largest net decrease.



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

