

Wine Industry

I N F O R M A T I O N

January 2009



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2009 GRAPE AND WINE HARVEST

The harvest estimates done by the viticulturists in respective regions during the second week of January 2009, do not deviate much from the official November 2008 estimates. The 2009 wine grape harvest is estimated at 1 321 877 tons, 7 % less than the 2008 harvest estimate. A slight decrease compared to the November 2008 estimate is estimated in the Swartland and Paarl areas (pages 2 and 3).

The favourable moderate weather conditions that prevailed during December till now with the absence of abnormal weather conditions are the reasons to expect a slight deviation from the November 2008 harvest estimates. Vineyards grew quite actively during this period due to the favourable weather conditions and good ground water supplies. Diseases and pests are well under control and without heat waves and excessive rainfall, we expect a very good qualitative vintage for the South African wine industry.

Also in this issue – domestic sales of natural wine during November 2008 (page 4), information regarding the price ranges in which wine were sold in bulk during November 2008 (pages 5 to 9), average prices of wine sold in bulk according to vintage, January to November 2008 (page 10), exports of wine and flavoured grape liquor for the period January to December 2008 (page 11), exports per country for the period January to December 2008 (page 12), exports of spirits for the period January to December 2008 (page 13), exports in various containers from January to December 2008 (page 14), exchange rate comparisons (page 15), import parity prices for wine, grape juice for concentrate and wine spirits respectively (pages 16 to 18) and volume of wine certified during December 2008 (pages 19 and 20).

SAWIS greetings until February
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FOR ANY ENQUIRIES CONTACT:

Robin Thomas
Tel: (021) 807 5719
E-mail: robin@sawis.co.za
Web page: www.sawis.co.za

ESTIMATED 2009 GRAPE AND WINE CROP

DISTRICT	GRAPE CROP - TONS								ESTIMATE 31/08/2008	ESTIMATE 28/11/2008	ESTIMATE 14/01/2009
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	
ORANGE RIVER	128 285	83 436	173 420	144 697	206 193	161 549	192 369	161 555	170 882	136 706	136 706
<i>trend (%) on previous year</i>	111.1	65.0	207.8	83.4	142.5	78.3	119.1	84.0	105.8	80.0	80.0
OLIFANTS RIVER	173 126	159 902	165 603	205 150	178 590	181 445	198 618	209 805	220 400	207 176	207 176
<i>trend (%) on previous year</i>	93.8	92.4	103.6	123.9	87.1	101.6	109.5	105.6	105.0	94.0	94.0
MALMESBURY	91 193	80 689	80 026	109 118	103 947	98 663	118 076	117 020	131 226	127 289	126 633
<i>trend (%) on previous year</i>	111.6	88.5	99.2	136.4	95.3	94.9	119.7	99.1	112.1	97.0	96.5
LITTLE KAROO	41 458	36 500	42 020	42 301	44 522	37 220	37 051	47 348	40 873	42 917	43 734
<i>trend (%) on previous year</i>	76.2	88.0	115.1	100.7	105.3	83.6	99.5	127.8	86.3	105.0	107.0
PAARL	128 018	123 572	105 287	144 833	138 802	138 796	145 937	152 855	154 866	148 671	147 897
<i>trend (%) on previous year</i>	99.0	96.5	85.2	137.6	95.8	100.0	105.1	104.7	101.3	96.0	95.5
ROBERTSON	161 055	141 267	165 304	176 440	184 095	158 679	166 782	196 796	204 284	196 113	196 113
<i>trend (%) on previous year</i>	80.2	87.7	117.0	106.7	104.3	86.2	105.1	118.0	103.8	96.0	96.0
STELLENBOSCH	105 533	98 514	76 999	114 285	115 276	115 229	122 742	113 740	119 179	115 008	115 008
<i>trend (%) on previous year</i>	95.1	93.3	78.2	148.4	100.9	100.0	106.5	92.7	104.8	96.5	96.5
WORCESTER	269 502	253 581	271 216	296 865	340 759	280 051	320 004	352 328	378 924	348 610	348 610
<i>trend (%) on previous year</i>	90.9	94.1	107.0	109.5	114.8	82.2	114.3	110.1	107.5	92.0	92.0
TOTAL (INDUSTRY)	1 098 170	977 461	1 079 875	1 233 689	1 312 184	1 171 632	1 301 579	1 351 447	1 420 634	1 322 490	1 321 877
<i>trend (%) on previous year</i>	93.6	89.0	110.5	114.2	106.4	89.3	111.1	103.8	105.1	93.1	93.0
LITRES PER GROSS TON	762	764	772	775	774	773	778	772	769	773	773
WINE PRODUCTION MILLION GROSS LITRES	837.2	746.5	834.2	956.0	1 015.7	905.2	1 013.0	1 043.5	1 093.0	1 022.7	1 022.0

HARVEST AND SALES ESTIMATES

WINE PRODUCED	Average % alc/vol 2008	million gross litres							Trend 2009/ 2008
		2003	2004	2005	2006	2007	Estimate		
							2008	2009	
Wine		712.7	696.8	628.5	709.7	730.4	780.2	739.0	94.7
Wine for brandy	11.18	50.5	85.4	82.9	82.1	101.5	88.0	75.8	86.1
Grape juice concentrate and grape juice	10.77	70.7	87.8	64.6	73.2	65.2	66.9	55.0	82.2
Distilling wine	9.48	122.2	145.8	129.2	147.9	146.4	157.9	152.2	96.4
Total		956.0	1 015.7	905.2	1 013.0	1 043.5	1 093.0	1 022.0	93.5

WINE MARKET REQUIREMENT	million gross litres							Trend 2009/ 2008
	2003	2004	2005	2006	2007	Estimate		
						2008	2009	
Producer sales to wholesalers: Wine in bulk	362.9	416.1	419.1	405.5	440.1	508.5		
Grapes	66.3	67.8	67.5	71.8	67.2	70.9		
	429.2	483.8	486.6	477.3	507.3	579.4		
Direct producer sales (packaged wine) and exports	139.9	154.5	148.2	155.4	173.4	198.9		
Total	569.1	638.3	634.8	632.7	680.7	778.3	778.3	100.0
Wine imported in bulk by wholesalers*	41.9		15.4	11.3	9.2	11.0	11.5	104.3
Total wine market requirement	611.0	638.3	650.2	644.0	690.0	789.3	789.3	100.0

* concentrate component included

WINE PRODUCTION AND SALES	million gross litres							Trend 2009/ 2008
	2003	2004	2005	2006	2007	Estimate		
						2008	2009	
Total wine stock at private and producer cellars on 1 Jan						425.2	401.1	
Wine production	712.7	696.8	628.5	709.7	730.4	780.2	739.0	94.7
Natural wine and must for sweetening imported by private and producer cellars	6.8	2.0	3.7	7.0	3.7	6.8	6.8	100.0
Minus: Sales	569.1	638.3	634.8	632.7	680.7	778.3	778.3	100.0
Transfers (previous vintages)	3.2	6.2	5.4	3.6	10.2	10.2	5.0	48.8
Lees destroyed/shortages	13.3	22.0	17.7	18.2	22.7	22.7	22.7	100.0
Total wine stock at private and producer cellars on 31 Dec	336.8	363.7	339.4	403.1	425.2	401.1	341.0	85.0
Total wine stock at producer cellars on 31 Dec	233.8	248.5	221.1	278.4	295.4			
Total wine stock at private cellars on 31 Dec	103.0	115.2	118.3	124.6	129.8			

DISTILLING WINE MARKET REQUIREMENT	million litres @ 10% alc/vol							Trend 2009/ 2008
	2003	2004	2005	2006	2007	Estimate		
						2008	2009	
Ex bedryf	124.9	149.9	130.33	148.5	154.6	169.2	144.3	109.4
Ex import (current year)	61.0	16.0	24.3	31.1	39.6	9.2	2.1	23.2
Ex import (previous year)	-	-	30.0	10.0	-			
Ex pool	1.5	1.9	1.8	1.4	0.04	0.04	0.04	100.0
Total	187.4	167.8	186.4	191.0	194.2	178.4	146.4	91.9
Pool deliveries	1.5	1.9	1.8	1.4	0.04	0.04	0.04	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	
	NOV 2007	NOV 2008	SEP 2007	NOV 2007	SEP 2008	NOV 2008	TREND	JUN 2007	NOV 2007	JUN 2008	NOV 2008	TREND	DEC 2006	NOV 2007	DEC 2007	NOV 2008
		TREND														
Wholesalers	16 024 772	13 594 891	43 990 424	43 088 429	85 538 160	85 317 991	99.74	169 024 965	166 796 599	98.68					53.74	
Private Cellars	3 902 056	4 149 143	10 963 620	11 492 052	19 959 805	21 490 460	107.67	36 858 975	41 027 630	111.31					13.22	
Producer Cellars	8 888 979	8 604 207	26 296 758	25 675 271	57 179 949	51 820 672	90.63	104 942 563	102 558 382	97.73					33.04	
SUB TOTAL	28 815 807	26 348 241	81 250 802	80 255 752	162 677 914	158 629 123	97.51	310 826 503	310 382 611	99.86					100.00	
Wine component of alc fruit bev	0	0	0	0	0	0		418 916	0	0.00					0.00	
TOTAL	28 815 807	26 348 241	81 250 802	80 255 752	162 677 914	158 629 123	97.51	311 245 419	310 382 611	99.72					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	
	NOV 2007	NOV 2008	SEP 2007	NOV 2007	SEP 2008	NOV 2008	TREND	JUN 2007	NOV 2007	JUN 2008	NOV 2008	TREND	DEC 2006	NOV 2007	DEC 2007	NOV 2008
		TREND														
TOTAL	29 840 202	28 124 359	90 925 197	118 534 619	171 512 171	229 023 257	133.53	309 454 594	401 221 712	129.65					100.00	

DOMESTIC SALES AND EXPORT OF NATURAL WINE

GROSS LITRE

	1 MONTH		3 MONTHS				6 MONTHS				12 MONTHS				MARKET SHARE	
	NOV 2007	NOV 2008	SEP 2007	NOV 2007	SEP 2008	NOV 2008	TREND	JUN 2007	NOV 2007	JUN 2008	NOV 2008	TREND	DEC 2006	NOV 2007	DEC 2007	NOV 2008
		TREND														
TOTAL	58 656 009	54 472 600	172 175 999	198 790 371	334 190 085	387 652 380	116.00	620 700 013	711 604 323	114.65					100.00	

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

TYPE	PRICE RANGE R / HL OF C / l		ORANGE RIVER		OLIFANTS RIVER		MALMESBURY		LITTLE KAROO		PAARL		ROBERTSON		STELLENBOSCH		WORCESTER		INDUSTRY 2008		INDUSTRY %		
			LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	2007	2006	
Cinsaut	150 - < 200						146 618	5.3												146 618	2.3	0.0	
	200 - < 250						245 297	8.9					121 630	49.9	29 950	4.6	26 650	1.2	1 139 879	51.9	26 650	0.4	1.6
	250 - < 300						469 905	17.1					121 840	50.0	301 610	46.8	1 139 879	28.1	1 838 121	29.4	1 838 121	29.4	1.6
	300 - < 350						1 786 519	65.2					220	0.1	288 000	44.7	6 159 946	28.1	2 527 496	40.4	6 159 946	25.0	20.5
	350 - < 400						14 938	0.5									373 437	17.0	39 540	1.8	373 437	0.9	36.4
	400 - < 450																25 140	3.9			54 698	0.4	6.9
	450 - < 500																				25 140	0.1	18.8
	500 - < 550																				77 520	0.0	1.4
	550 - < 600																				77 520	0.0	3.1
	600 - < 700																					0.0	0.0
700 - < 750																					0.0	0.0	
TOTAL f			62 820	100.0			2 740 797	100.0				243 690	100.0	644 700	100.0	2 195 452	100.0	2 195 452	100.0	6 254 204	100.0	100.0	
AVE PRICE			373.94				350.87					287.64		344.18		298.20		298.20		317.42		317.42	
Rosé and Blanc de noir	100 - < 150																						
	150 - < 200						21 890	1.6															
	200 - < 250						18 250	1.4															
	250 - < 300						43 885.4	32.8															
	300 - < 350						227 360	6.8															
	350 - < 400						2 955 172	88.7															
	400 - < 450						37 740	1.1															
	450 - < 500						617 710	46.1															
	500 - < 550						73 900	2.2															
	550 - < 600						37 000	1.1															
TOTAL f			3 331 172	100.0			2 411 875	100.0				5 328 163	100.0	599 358	100.0	2 413 342	100.0	2 413 342	100.0	10 963 463	100.0	100.0	
AVE PRICE			318.83				331.37					317.35		268.59		306.52		306.52		311.88		304.68	
Other red and blends	100 - < 150						1 992 700	14.8															
	150 - < 200						548 280	4.1															
	200 - < 250						15 640	0.1															
	250 - < 300						739 791	5.3															
	300 - < 350						709 782	5.3															
	350 - < 400						3 614 008	26.9															
	400 - < 450						3 758 438	28.0															
	450 - < 500						1 409 132	10.5															
	500 - < 550																						
	550 - < 600																						
TOTAL f			13 420 470	100.0			8 643 371	100.0				8 825 108	100.0	4 056 463	100.0	11 965 986	100.0	11 965 986	100.0	53 270 413	100.0	100.0	
AVE PRICE			249.04				354.74					342.18		355.00		324.34		324.34		345.60		366.77	
Chardonnay	100 - < 150																						
	150 - < 200																						
	200 - < 250																						
	250 - < 300																						
	300 - < 350																						
	350 - < 400																						
	400 - < 450																						
	450 - < 500																						
	500 - < 550																						
	550 - < 600																						
TOTAL f			1 350 660	100.0			1 709 511	100.0				8 837 427	100.0	248 074	100.0	10 605 006	100.0	10 605 006	100.0	23 822 754	100.0	100.0	
AVE PRICE			387.67				519.67					498.38		483.14		472.36		472.36		480.22		474.14	
Juice	100 - < 150																						
	150 - < 200																						
	200 - < 250																						
	250 - < 300																						
	300 - < 350																						
	350 - < 400																						
	400 - < 450																						
	450 - < 500																						
	500 - < 550																						
	550 - < 600																						
TOTAL f			31 528	100.0			63 481	100.0				706 003	100.0	31 528	100.0	566 253	100.0	566 253	100.0	1 367 265	100.0	476.18	
AVE PRICE			393.65				393.65					402.19		402.19		402.19		402.19		457.42		476.18	

TYPE	PRICE RANGE R / HL OF C / ℓ	ORANGE RIVER		OLIFANTS RIVER		MALMESBURY		LITTLE KAROO		PAARL		ROBERTSON		STELLENBOSCH		WORCESTER		INDUSTRY 2008		INDUSTRY %		
		LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	2007	2006	
Sauvignon Blanc	150 - < 200									24 550	1.3	118 467	1.9	11 125	1.1	173 690	2.0	198 240	1.1	0.2	0.0	
	200 - < 250											118 467	1.9			322 800	3.7	452 392	2.4	0.8	0.4	
	250 - < 300									20 260	1.1	208 370	3.3	6 150	0.6	366 253	4.1	603 010	3.2	3.8	1.7	
	300 - < 350											107 170	1.7			354 553	4.0	475 527	2.5	3.0	1.3	
	350 - < 400											85 700	1.4	1 100	0.1	58 950	0.7	310 860	1.7	2.1	3.5	
	400 - < 450									143 260	7.6	763 308	12.2			1 552 468	17.6	2 743 160	14.6	6.4	13.7	
	450 - < 500									186 318	9.9	2 186 268	34.8	595 702	57.8	3 518 464	39.8	6 881 181	36.7	50.9	32.5	
	500 - < 550									260 070	13.8	980 510	15.6	67 120	6.5	1 812 787	20.5	3 715 405	19.8	10.4	29.9	
	550 - < 600									830 437	44.0	1 722 532	27.4			472 005	5.3	2 533 491	13.5	12.4	7.5	
	600 - < 650									329 674	17.5	43 760	0.7			95 040	1.1	138 800	0.7	1.6	1.3	
	650 - < 700									30 440	1.6			69 200	6.7	30 940	0.4	230 570	1.2	1.8	1.6	
	700 - < 750									30 420	1.6			168 031	16.3	5 700	0.1	204 151	1.1	1.9	1.9	
	750 - < 800															44 678	0.5	30 280	0.2	0.3	1.0	
	800 - < 850																				0.6	0.6
	850 - < 900																				0.0	0.4
900 - < 950																				0.0	0.4	
950 - < 1000																				0.3	0.3	
> 1000																				0.7	1.0	
TOTAL ℓ										1 885 709	100.0	6 278 028	100.0	1 030 478	100.0	8 838 050	100.0	18 765 460	100.0	519.03	517.21	
AVE PRICE										545.51	475.00	945 351	488.28	172 722	500.00	1 199 122	483.87	2 531 158	486.17	500.98	500.00	
AVE PRICE										4.8	4.8	29 110	0.5	698 720	12.7	191 970	0.6	1 188 950	0.2	0.0	0.0	
150 - < 200										45 700	0.6	2 271 034	37.5	1 878 400	34.1	10 785 321	35.8	23 246 981	37.4	1.8	1.2	
200 - < 250										67 030	0.9	1 845 510	30.5	767 174	13.9	14 436 325	47.9	21 478 873	34.5	37.4	36.8	
250 - < 300										1 128 132	14.8	1 621 028	26.8	1 325 410	24.0	3 629 033	12.0	8 325 949	13.4	33.7	40.0	
300 - < 350										1 171 490	15.4	2 280 920	4.6	515 215	9.3	1 034 349	3.4	4 400 243	7.1	16.4	11.1	
350 - < 400										2 459 749	32.3	11 280	0.2	160 730	2.9	91 080	0.3	1 272 353	2.0	6.1	9.5	
400 - < 450										1 003 303	13.2			158 620	2.9	1 729 503	2.8	1 272 353	2.0	3.7	0.7	
450 - < 500										2 940	0.0			5 120	0.1	8 060	0.0	8 060	0.0	0.5	0.4	
500 - < 550										70 840	0.9					70 840	0.1	70 840	0.1	0.2	0.1	
550 - < 600										91 840	1.2					91 840	0.1	91 840	0.1	0.0	0.0	
600 - < 650											0.0					2 280	0.0	2 280	0.0	0.0	0.0	
650 - < 700										2 280	0.0					4 800	0.0	4 800	0.0	0.1	0.0	
700 - < 750																				0.0	0.0	
> 1000																				0.0	0.0	
TOTAL ℓ										7 514 187	100.0	6 058 882	100.0	5 514 189	100.0	30 168 078	100.0	62 239 410	100.0	321.16	323.17	
AVE PRICE										416.85	282.57	318.02	324.57	324.57	313.87	6 200	450.00	6 200	450.00	363.57	363.57	
AVE PRICE																12 615	0.1	12 615	0.0	0.0	0.0	
150 - < 200																24 620	0.2	1 522 401	3.8	1.4	1.6	
200 - < 250										24 156	11.7	253 825	3.2	8 400	0.2	4 819 096	34.8	21 923 695	55.0	54.1	49.6	
250 - < 300										37 740	18.3	3 304 025	41.9	1 139 595	83.8	5 956 652	43.0	10 563 387	26.5	31.7	39.7	
300 - < 350										144 440	70.0	1 397 048	17.7	211 977	15.6	1 796 368	13.0	3 330 836	8.3	12.7	9.0	
350 - < 400												1 107 510	14.0	1 075 630	7.8	2 322 270	5.8	2 322 270	5.8	0.0	0.0	
400 - < 450												18 340	0.2			166 250	1.2	197 850	0.5	0.0	0.0	
450 - < 500																				0.0	0.1	
500 - < 550																				0.0	0.0	
850 - < 900																				0.0	0.0	
TOTAL ℓ										206 336	100.0	7 883 768	100.0	1 359 972	99.4	13 851 231	100.0	39 891 394	100.0	100.0	100.0	
AVE PRICE										308.98	314.20	319.38	275.29	275.29	321.31	6 200	450.00	6 200	450.00	297.46	293.68	
AVE PRICE																14 744	0.7	14 744	0.7	0.0	0.0	
200 - < 250										14 744	2.7	65 350	41.7	25 200	18.5	553 080	45.5	643 630	30.8	27.2	20.0	
250 - < 300										295 630	55.0	91 250	58.3	48 350	35.5	401 460	33.0	791 740	37.8	54.5	56.4	
300 - < 350										210 640	39.2	16 150	3.0	62 500	45.9	242 400	19.9	606 790	29.0	18.3	23.6	
350 - < 400																19 650	1.6	35 800	1.7	0.0	0.0	
400 - < 450																				0.0	0.0	
TOTAL ℓ										537 164	100.0	156 600	100.0	136 050	100.0	1 216 590	100.0	2 092 704	100.0	100.0	100.0	
AVE PRICE										345.21	339.11	342.44	339.11	339.11	313.88	6 200	450.00	6 200	450.00	317.82	323.79	
AVE PRICE																197 850	1.2	197 850	0.5	0.0	0.0	

TYPE	PRICE RANGE R / HL OF C / ℓ		ORANGE RIVER		OLIFANTS RIVER		MALMESBURY		LITTLE KAROO		PAARL		ROBERTSON		STELLENBOSCH		WORCESTER		INDUSTRY 2008		INDUSTRY %	
			LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	LITRES	%	2007	2006
Semillon	150 - < 200																					
	200 - < 250																					
	250 - < 300																					
	300 - < 350				174 606	60.8																
	350 - < 400			37 020	12.9																	
	400 - < 450			42 080	14.7																	
	450 - < 500			33 471	11.7																	
	500 - < 550																					
	550 - < 600																					
	600 - < 650																					
650 - < 700																						
TOTAL ℓ			287 177	100.0							175 790	100.0	295 460	100.0	82 650	100.0	3 500 739	100.0	4 539 816	100.0	100.0	100.0
AVE PRICE				366.70							359.74		330.47		388.29		369.30		352.93		366.46	339.03
Juice	100 - < 150																					
	150 - < 200																					
	200 - < 250			388 310	4.2	932 384	1.4	50 171	0.9	168 280	3.2	48 800	0.6	12 000	0.1	83 960	2.8	4 500		199 431		0.0
	250 - < 300			1 870 950	20.3	12 295 410	18.0	1 115 315	2.1	750 385	14.3	10 150	0.1	331 700	1.5	424 270	14.0	988 136	1.9	3 958 545		2.1
	300 - < 350			2 361 010	25.6	46 252 655	67.9	3 257 737	58.2	750 385	14.3	3 469 228	39.4	3 219 010	14.8	847 420	28.0	16 043 991	30.7	41 754 222		24.0
	350 - < 400			2 537 900	27.5	8 383 124	12.3	1 932 963	34.5	4 143 896	79.1	1 030 979	11.7	11 929 153	54.9	1 113 579	36.9	21 021 493	40.2	89 785 508		51.6
	400 - < 450			2 067 260	22.4	32 420	0.0	3 840	0.1	177 420	3.4	3 474 640	39.5	2 596 976	11.9	365 518	12.1	10 672 010	20.4	28 364 524		16.3
	450 - < 500																					
	500 - < 550																					
	550 - < 600																					
600 - < 650																						
650 - < 700																						
700 - < 750																						
750 - < 800																						
800 - < 850																						
850 - < 900																						
900 - < 950																						
> 1000																						
TOTAL ℓ			9 225 430	100.0	68 140 367	100.0	5 600 477	100.0	5 239 981	100.0	8 794 085	100.0	21 732 493	100.0	3 021 393	100.0	52 229 390	100.0	173 985 616	100.0	100.0	100.0
AVE PRICE			285.44		263.03		244.98		259.57		285.50		291.50		256.83		272.37		270.92		275.02	274.39
Fortified	100 - < 150																					
	150 - < 200																					
	200 - < 250																					
	250 - < 300																					
	300 - < 350																					
	350 - < 400																					
	400 - < 450																					
	450 - < 500																					
	500 - < 550																					
	550 - < 600																					
600 - < 650																						
650 - < 700																						
700 - < 750																						
750 - < 800																						
800 - < 850																						
850 - < 900																						
900 - < 1000																						
> 1000																						
TOTAL ℓ			512 567	100.0	1 079 737	100.0	124 141	100.0	1 079 737	100.0	140 982	100.0	1 875 592	100.0	284 677	100.0	5 528 675	100.0	9 546 571	100.0	100.0	100.0
AVE PRICE				431.23		431.23		1137.87		410.19		450.34		379.75		395.85		357.78		384.61		354.58

All Varieties	AVE PRICE R / HL OR C / ℓ	264.04		389.42		297.79		396.46		369.93		337.64		340.74		334.87		334.87		334.87		338.42
All red varieties	AVE PRICE R / HL OR C / ℓ	249.53		454.24		296.67		408.45		379.52		361.50		366.27		374.41		366.27		374.41		406.02
All white varieties	AVE PRICE R / HL OR C / ℓ	264.48		283.05		286.77		378.26		364.38		325.41		315.01		314.46		325.41		314.46		310.51
** Wine for brandy	CENT PER LITRE @ 10% ALC/VOL																					210.59
Distilling wine	CENT PER LITRE @ 10% ALC/VOL																					94.10

* Including juice
** Price to the point of delivery at the buyers premises
Rebate lease included in price
Prices excluded rebate brandy

AVERAGE PRICES OF WINE SOLD IN BULK ACCORDING TO VINTAGE

TYPE	PRICE RANGE R / HL OR C / £	2005				2006				2007				JAN - NOV 2008				INDUSTRY GROWTH			
		2005 VINTAGE	OTHER VINTAGES	TOTAL	2006 VINTAGE	OTHER VINTAGES	TOTAL	2007 VINTAGE	OTHER VINTAGES	TOTAL	2008 VINTAGE	OTHER VINTAGES	TOTAL	2005 - 2006	2006 - 2007	2007 - 2008					
Cabernet Sauvignon	LITRES	4 243 515	10 343 497	14 587 012	4 042 008	11 612 097	15 654 105	7 935 636	14 368 025	22 293 661	12 160 237	11 810 397	23 970 634	7.32	42.41	7.52					
	AVE PRICE R / HL OR C / £	515.66	630.04	596.76	461.22	507.13	476.23	419.70	436.45	430.49	452.14	449.52	450.85	-20.20	-9.60	4.73					
Cabernet Franc	LITRES	174 103	169 733	343 836	95 670	271 978	367 648	275 262	209 266	484 528	493 354	332 253	825 589	6.93	31.79	70.39					
	AVE PRICE R / HL OR C / £	426.05	342.73	384.92	369.71	421.64	408.12	456.03	411.36	436.73	432.77	348.69	398.93	6.03	7.01	-8.66					
Ruby Cabernet	LITRES	2 939 759	4 717 838	7 656 597	1 601 831	4 987 484	6 589 315	2 065 812	3 814 518	5 880 330	3 863 980	3 548 365	7 412 345	-13.94	-10.76	26.05					
	AVE PRICE R / HL OR C / £	364.86	440.47	411.45	319.77	417.00	393.36	281.65	314.30	302.83	362.05	340.26	351.62	-4.40	-23.01	16.11					
Merlot	LITRES	4 061 067	7 440 764	11 501 831	3 501 475	5 395 154	8 896 629	4 775 152	7 574 527	12 349 679	9 025 989	7 799 151	16 825 140	-22.65	38.81	36.24					
	AVE PRICE R / HL OR C / £	440.36	488.24	471.33	349.77	456.47	426.29	392.80	399.13	396.68	418.54	416.46	417.58	-9.56	-6.95	5.27					
Shiraz	LITRES	4 551 037	7 197 807	11 748 844	5 742 215	8 595 511	14 337 726	8 454 908	11 481 834	19 936 762	14 526 373	11 134 332	25 660 705	22.04	39.05	28.71					
	AVE PRICE R / HL OR C / £	485.10	588.12	549.21	521.99	509.28	514.37	446.09	466.97	458.12	482.06	454.23	469.98	-6.17	-10.94	2.59					
Pinotage	LITRES	7 314 746	9 333 874	16 648 620	6 137 551	8 638 914	14 778 465	5 254 275	7 606 814	12 861 089	7 293 426	8 557 688	15 851 114	-11.25	-12.96	23.25					
	AVE PRICE R / HL OR C / £	411.37	469.09	443.73	376.24	403.28	392.88	391.10	400.54	396.68	397.31	421.13	410.17	-11.46	0.97	3.40					
Pinot Noir	LITRES	25 320	26 144	51 464	40 111	3 000	43 111	18 318	62 540	70 858	59 674	5 400	65 074	-16.23	64.36	-8.16					
	AVE PRICE R / HL OR C / £	605.27	697.57	652.16	425.72	350.00	420.45	674.63	541.03	325.00	541.03	325.00	523.10	-35.53	60.10	-22.29					
Chisaut	LITRES	2 052 245	6 300 459	8 352 704	1 595 822	4 654 706	6 250 528	1 804 453	2 779 117	4 583 570	2 225 712	4 028 492	6 254 204	-25.17	-26.67	36.45					
	AVE PRICE R / HL OR C / £	343.15	413.97	396.57	301.27	366.04	349.50	325.51	312.17	317.42	337.63	318.18	325.10	-11.87	-9.18	2.42					
Rosé and Blanc de Noir	LITRES	9 631 834	2 520 050	12 151 884	11 706 756	2 172 220	13 878 976	13 612 799	4 101 376	17 714 175	18 135 036	6 278 306	24 413 342	14.21	27.63	37.82					
	AVE PRICE R / HL OR C / £	307.26	297.87	305.31	304.57	305.27	304.68	293.09	310.52	297.13	321.09	285.29	311.88	-0.21	-2.48	4.96					
Other red and blends	LITRES	11 730 054	18 765 969	30 496 023	9 660 770	18 188 278	27 869 048	14 398 428	24 806 419	39 204 847	24 042 935	29 227 478	53 270 413	-8.61	40.68	35.88					
	AVE PRICE R / HL OR C / £	370.42	392.88	384.24	372.52	363.78	386.66	341.46	333.48	336.41	370.42	325.19	345.60	0.63	-13.00	2.73					
Chardonnay	LITRES	12 306 058	5 777 779	18 083 837	12 481 165	5 219 171	17 700 336	13 393 606	5 085 455	18 479 061	17 522 773	6 299 981	23 822 754	-2.12	4.40	28.92					
	AVE PRICE R / HL OR C / £	502.92	475.67	494.22	499.87	483.72	495.11	479.19	460.83	474.14	479.63	481.85	480.22	0.18	-4.24	1.28					
Sauvignon Blanc	LITRES	12 697 870	1 490 984	14 188 854	8 320 457	1 698 065	10 018 522	12 055 148	1 919 885	13 975 033	15 595 119	3 206 341	18 765 460	-29.39	39.49	34.28					
	AVE PRICE R / HL OR C / £	526.78	482.31	522.11	549.52	537.80	547.53	522.46	484.21	517.21	525.59	487.23	519.03	4.87	-5.54	0.35					
Chenin Blanc	LITRES	46 295 843	12 621 189	58 917 032	44 764 301	7 438 944	52 202 645	46 226 759	15 293 149	61 519 908	46 466 964	15 772 446	62 239 410	-11.40	17.85	1.17					
	AVE PRICE R / HL OR C / £	309.13	287.16	304.43	319.37	304.63	317.27	324.41	319.44	323.17	327.55	302.33	321.16	4.22	1.86	-0.62					
Colombar	LITRES	22 060 334	9 242 084	31 302 418	21 930 407	4 217 001	26 147 408	21 304 755	6 576 815	27 881 570	28 133 208	11 758 186	39 891 394	-16.47	6.63	43.07					
	AVE PRICE R / HL OR C / £	283.51	263.84	277.70	291.36	305.73	293.68	295.53	293.69	297.46	298.52	293.15	296.94	5.75	1.29	-0.17					
Riesling	LITRES	2 448 590	543 483	2 992 073	2 493 996	136 950	2 630 946	2 683 039	1 032 640	3 715 679	1 503 154	589 950	2 092 704	-12.07	41.23	-43.68					
	AVE PRICE R / HL OR C / £	323.25	267.49	313.12	321.25	370.00	323.79	318.28	324.42	317.82	322.29	335.65	326.05	3.41	-1.84	2.59					
Semillon	LITRES	3 069 433	719 240	3 788 673	2 776 518	727 474	3 503 992	3 082 645	592 898	3 675 543	3 270 625	1 069 191	4 339 816	-7.51	4.90	18.07					
	AVE PRICE R / HL OR C / £	335.67	319.71	332.64	342.15	327.13	339.03	354.82	343.09	352.93	369.14	358.28	366.46	1.92	4.10	3.83					
Other white and blends	LITRES	108 780 776	48 200 003	156 980 779	129 676 318	27 875 670	157 551 988	103 032 977	49 551 160	152 584 137	112 189 609	61 794 007	173 983 616	0.36	-3.15	14.02					
	AVE PRICE R / HL OR C / £	262.10	238.48	254.85	276.48	264.65	274.39	278.07	268.68	275.02	270.92	260.03	270.92	7.67	0.23	-1.49					
Fortified	LITRES	8 009 417	1 275 209	9 284 626	10 148 330	1 147 268	11 295 598	11 090 083	610 595	11 700 678	7 398 335	2 148 236	9 546 571	21.66	3.59	-18.41					
	AVE PRICE R / HL OR C / £	345.36	356.47	346.88	355.13	349.73	354.58	371.28	372.99	371.37	388.91	369.80	384.61	2.22	4.74	3.57					
All Varieties	LITRES	262 391 001	146 686 106	409 077 107	276 735 701	112 979 285	389 714 986	271 464 055	157 447 053	428 911 108	323 520 663	185 709 622	509 230 285	-4.73	10.06	18.73					
	AVE PRICE R / HL OR C / £	323.59	364.74	339.35	323.18	375.74	338.42	331.40	340.86	334.87	346.03	331.52	340.74	0.02	-1.05	1.75					
All red varieties	LITRES	46 709 860	66 798 604	113 498 464	44 127 869	64 519 942	108 647 211	58 459 222	76 451 962	134 911 184	91 476 876	83 071 684	174 548 560	-4.27	24.17	29.38					
	AVE PRICE R / HL OR C / £	393.01	473.70	440.49	378.96	424.53	406.02	362.62	383.43	374.41	394.77	376.90	386.27	-7.83	-7.79	3.17					
All white varieties	LITRES	207 671 724	78 622 293	286 294 017	222 459 502	47 312 675	269 772 177	201 914 750	80 384 496	282 299 246	224 645 452	100 489 702	325 135 154	-5.77	4.64	15.17					
	AVE PRICE R / HL OR C / £	307.14	272.31	297.57	310.51	309.83	310.51	320.17	300.13	314.46	324.78	293.19	315.01	4.35	1.27	0.17					

RSA EXPORTS: WINE AND FLAVOURED GRAPE LIQUOR

PRODUCT		DECEMBER			6 MONTHS			12 MONTHS			Litres
		2007	2008	Trend	JUL '07 - DEC '07	JUL '08 - DEC '08	Trend	JAN '07 - DEC '07	JAN '08 - DEC '08	Trend	
Chardonnay	P	1 193 510	1 370 737	114.85	9 144 507	9 044 257	98.90	16 633 443	17 326 761	104.17	
	B	436 912	712 987	163.19	2 492 702	6 802 502	272.90	4 385 051	12 286 733	280.20	
Sauvignon Blanc	P	835 971	1 062 500	127.10	7 251 313	8 785 453	121.16	13 248 406	15 748 861	118.87	
	B	350 108	121 770	34.78	1 843 317	1 972 727	107.02	2 981 469	4 157 748	139.45	
Chenin Blanc	P	1 319 778	1 288 215	97.61	8 323 564	9 776 608	117.46	16 974 463	18 575 102	109.43	
	B	1 515 962	2 102 432	138.69	11 883 655	14 411 655	121.27	22 330 066	24 540 187	109.90	
Other White	P	2 789 143	3 332 676	119.49	16 375 337	22 009 433	134.41	32 019 335	40 084 621	125.19	
	B	1 817 886	1 372 300	75.49	11 917 367	22 542 429	189.16	18 275 537	40 900 447	223.80	
TOTALS WHITE WINE	P	6 138 402	7 054 128	114.92	41 094 721	49 615 751	120.74	78 875 647	91 735 345	116.30	
	B	4 120 868	4 309 489	104.58	28 137 041	45 729 313	162.52	47 972 123	81 885 115	170.69	
	P+B	10 259 270	11 363 617	110.76	69 231 762	95 345 064	137.72	126 847 770	173 620 460	136.87	
Cabernet Sauvignon	P	1 016 807	1 173 770	115.44	7 096 327	8 048 107	113.41	13 330 308	14 233 581	106.78	
	B	448 890	535 715	119.34	3 372 414	4 591 082	136.14	6 001 794	7 334 053	122.20	
Shiraz	P	1 340 129	1 736 419	129.57	8 078 060	10 144 997	125.59	14 794 214	17 866 617	120.77	
	B	194 417	73 770	37.94	1 506 681	945 583	62.76	2 042 376	3 499 330	171.34	
Pinotage	P	829 055	886 728	106.96	4 152 404	4 971 119	119.72	8 666 345	9 617 114	110.97	
	B	326 780	873 105	267.18	4 792 075	4 623 030	96.47	8 537 162	7 988 903	93.58	
Merlot	P	620 266	709 401	114.37	3 644 162	4 827 555	132.47	6 989 509	8 531 606	122.06	
	B	148 955	74 710	50.16	1 296 395	798 690	61.61	2 120 188	2 609 460	123.08	
Other Red	P	5 238 563	6 152 525	117.45	31 518 311	37 904 701	120.26	59 181 324	67 926 165	114.78	
	B	2 331 047	4 090 433	175.48	24 872 241	37 020 480	148.84	42 467 485	69 717 409	164.17	
TOTALS RED WINE	P	9 044 820	10 658 843	117.84	54 489 264	65 896 479	120.93	102 961 700	118 175 083	114.78	
	B	3 450 089	5 647 733	163.70	35 839 806	47 978 865	133.87	61 169 005	91 149 155	149.01	
	P+B	12 494 909	16 306 576	130.51	90 329 070	113 875 344	126.07	164 130 705	209 324 238	127.54	
Blanc de Noir + Rosé	P	391 390	1 406 760	359.43	3 903 074	6 425 932	164.64	8 745 998	13 609 178	155.60	
	B	275 250	599 830	217.92	3 554 333	4 345 938	122.27	9 649 282	10 893 197	112.89	
	P+B	666 640	2 006 590	301.00	7 457 407	10 771 870	144.45	18 395 280	24 502 375	133.20	
TOTALS NATURAL WINE	P	15 574 612	19 119 731	122.76	99 487 059	121 938 162	122.57	190 583 345	223 519 606	117.28	
	B	7 846 207	10 557 052	134.55	67 531 180	98 054 116	145.20	118 790 410	183 927 467	154.83	
	P+B	23 420 819	29 676 783	126.71	167 018 239	219 992 278	131.72	309 373 755	407 447 073	131.70	
Fortified Wine	P	22 013	33 371	151.60	206 354	245 940	119.18	381 820	378 927	99.24	
	B	0	20 200	-	23 876	44 280	185.46	23 876	44 280	185.46	
	P+B	22 013	53 571	243.36	230 230	290 220	126.06	405 696	423 207	104.32	
Sparkling wine	P	234 775	439 487	187.19	1 835 805	2 420 278	131.84	2 779 364	3 952 009	142.19	
TOTALS ALL WINE	P	15 831 400	19 592 589	123.76	101 529 218	124 604 380	122.73	193 744 529	227 850 542	117.60	
	B	7 846 207	10 577 252	134.81	67 555 056	98 098 396	145.21	118 814 286	183 971 747	154.84	
	P+B	23 677 607	30 169 841	127.42	169 084 274	222 702 776	131.71	312 558 815	411 822 289	131.76	
OTHER(e.g. for vinegar, industrial)	P	0	0	-	0	0	-	0	0	-	
	B	168 155	144 264	85.79	168 155	1 370 807	815.20	168 155	1 899 328	1129.51	
	P+B	168 155	144 264	85.79	168 155	1 370 807	815.20	168 155	1 899 328	1129.51	
Flavoured Grape Liquor	P	0	0	-	0	0	-	12 702	15 522	122.20	
TOTALS ALL PRODUCTS	P	15 831 400	19 592 589	123.76	101 529 218	124 604 380	122.73	193 757 231	227 866 064	117.60	
	B	8 014 362	10 721 516	133.78	67 723 211	99 469 203	146.88	118 982 441	185 871 075	156.22	
	P+B	23 845 762	30 314 105	127.13	169 252 429	224 073 583	132.39	312 739 672	413 737 139	132.29	

P=Packaged

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

B=Bulk

RSA NATURAL WINE EXPORTS PER COUNTRY (PACKAGED AND BULK)

PACKAGED AND BULK NATURAL WINE EXPORTS (LITRES) PER COUNTRY FOR THE PERIOD JANUARY - DECEMBER

COUNTRY	200701 - 200712				200801 - 200812				TREND 200801 - 200812 / 200701 - 200712			
	WHITE	RED	BLANC DE NOIR / ROSÉ	TOTAL	WHITE	RED	BLANC DE NOIR / ROSÉ	TOTAL	WHITE	RED	BLANC DE NOIR / ROSÉ	TOTAL
UNITED KINGDOM	44 998 893	37 140 912	4 889 844	87 029 649	53 484 140	46 935 763	10 240 232	110 660 135	119	126	209	127
GERMANY	20 187 414	34 046 052	5 308 091	59 541 557	21 654 403	40 053 417	5 653 912	67 361 732	107	118	107	113
THE NETHERLANDS	10 361 733	14 112 804	4 552 880	29 027 417	10 758 877	14 198 776	4 332 201	29 289 854	104	101	95	101
SWEDEN	10 961 458	14 945 368	61 106	25 967 932	11 410 370	17 161 048	220 719	28 792 137	104	115	361	111
ANGOLA *	272 940	7 902 887	369 137	8 544 964	331 526	24 212 648	6 948	24 551 122	121	306	2	287
RUSSIA	1 036 079	1 499 322	9 014	2 544 415	16 224 572	1 814 843	302 032	18 345 447	1 566	121	3 351	721
U.S.A.	4 632 622	5 822 077	212 580	10 667 279	11 921 123	4 514 625	189 012	16 624 760	257	78	89	156
DENMARK	3 273 003	10 004 017	87 341	13 364 361	3 640 287	11 813 161	222 405	15 675 853	111	118	255	117
CANADA	4 253 372	8 686 346	44 915	12 984 633	6 783 358	6 677 462	105 998	13 566 818	159	77	236	104
NEW ZEALAND	3 411 180	2 354 046	4 302	5 769 528	5 905 283	4 972 857	27 527	10 905 667	173	211	640	189
BELGIUM	4 819 084	4 094 866	658 976	9 572 926	4 693 411	3 620 284	446 906	8 760 601	97	88	68	92
FRANCE	2 587 598	3 395 333	962 116	6 945 047	2 690 131	4 696 500	1 041 923	8 428 554	104	138	108	121
FINLAND	2 337 522	1 718 132	338	4 055 992	2 944 710	2 810 943	31 167	5 786 820	126	164	9 221	143
AUSTRALIA	384 077	349 205	11 327	744 609	3 766 447	1 842 337	21 078	5 630 362	981	528	186	756
REPUBLIC OF IRELAND	2 542 237	2 121 052	59 704	4 722 993	2 726 285	2 627 094	101 627	5 455 006	107	124	170	115
SWITZERLAND	2 308 653	1 614 561	502 739	4 425 953	2 905 502	1 814 328	544 780	5 264 610	126	112	108	119
CHINA	126 672	1 115 723	7 425	1 249 820	304 579	4 023 383	7 061	4 335 023	240	361	95	347
NIGERIA *	181 187	1 035 602	14 606	1 231 395	290 873	1 872 399	9 666	2 172 938	161	181	66	176
KENYA	973 095	1 199 673	14 652	2 187 420	859 924	918 155	20 023	1 798 102	88	77	137	82
NORWAY	207 951	1 391 030	3 216	1 602 197	307 886	1 478 918	909	1 787 713	148	106	28	112
JAPAN	479 541	872 996	2 255	1 354 792	697 470	1 081 796	5 211	1 784 477	145	124	231	132
UNITED ARAB EMIRATES	448 263	433 812	17 763	899 838	678 912	746 515	43 271	1 468 698	151	172	244	163
TANZANIA	721 712	565 604	13 767	1 301 083	690 839	523 806	24 107	1 238 752	96	93	175	95
MAURITIUS *	516 932	404 110	156 412	1 077 454	546 612	470 249	209 996	1 226 857	106	116	134	114
POLAND	204 086	769 094	36 446	1 009 626	263 765	750 763	28 526	1 043 054	129	98	78	103
LATVIA	285 299	466 176	4 275	755 750	156 311	304 845	2 250	463 406	55	65	53	61
OTHER COUNTRIES	4 335 168	6 069 905	390 053	10 795 126	6 982 863	7 382 822	662 888	15 028 573	161	122	170	139
TOTAL	126 847 771	164 130 705	18 395 280	309 373 756	173 620 459	209 324 237	24 502 375	407 447 071	137	128	133	132

PACKAGED NATURAL WINE EXPORTS (LITRES) PER COUNTRY FOR THE PERIOD JANUARY - DECEMBER

COUNTRY	200701 - 200712				200801 - 200812				TREND 200801 - 200812 / 200701 - 200712			
	WHITE	RED	BLANC DE NOIR / ROSÉ	TOTAL	WHITE	RED	BLANC DE NOIR / ROSÉ	TOTAL	WHITE	RED	BLANC DE NOIR / ROSÉ	TOTAL
UNITED KINGDOM	31 619 699	30 000 788	4 212 856	65 833 343	39 834 430	37 712 646	8 547 252	86 094 328	126	126	203	131
SWEDEN	10 961 458	14 897 248	61 106	25 919 812	11 410 370	16 152 338	220 719	27 783 427	104	108	361	107
THE NETHERLANDS	7 043 357	9 360 734	2 305 576	18 709 667	8 124 705	10 066 926	2 659 438	20 851 069	115	108	115	111
GERMANY	4 191 227	10 320 543	815 687	15 327 457	4 229 484	10 622 497	745 356	15 597 337	101	103	91	102
DENMARK	2 371 923	7 375 126	75 361	9 822 410	2 751 307	8 863 013	126 306	11 740 626	116	120	168	120
U.S.A.	4 125 644	5 268 017	212 580	9 606 241	4 035 531	4 247 925	189 012	8 472 468	98	81	89	88
CANADA	2 619 021	4 645 695	44 915	7 209 631	2 656 734	4 873 335	81 848	7 611 917	101	107	182	106
FINLAND	1 796 242	1 550 062	338	3 346 642	2 400 370	2 425 913	6 917	4 833 200	134	157	2 046	144
BELGIUM	2 373 986	2 254 186	242 296	4 870 468	2 506 501	2 102 427	204 226	4 813 154	106	93	84	99
REPUBLIC OF IRELAND	2 542 237	2 121 052	59 704	4 722 993	2 122 646	1 963 008	101 627	4 277 281	87	93	170	91
NEW ZEALAND	171 680	466 946	4 302	642 928	1 201 203	1 568 737	27 527	2 797 467	700	336	640	435
AUSTRALIA	288 194	349 205	11 327	648 726	1 353 623	978 817	21 078	2 353 518	470	280	186	363
NIGERIA *	181 187	1 035 602	14 606	1 231 395	290 873	1 872 399	9 666	2 172 938	161	181	66	176
KENYA	973 095	1 199 673	14 652	2 187 420	849 984	907 275	20 023	1 777 282	87	76	137	81
JAPAN	370 341	872 996	2 255	1 245 592	457 350	1 081 796	5 211	1 544 357	123	124	231	124
NORWAY	207 951	1 076 236	3 216	1 287 403	259 850	1 241 458	909	1 502 217	125	115	28	117
UNITED ARAB EMIRATES	448 263	433 812	17 763	899 838	678 912	746 515	43 271	1 468 698	151	172	244	163
RUSSIA	605 671	927 377	9 014	1 542 062	507 542	735 779	11 052	1 254 373	84	79	123	81
TANZANIA	721 712	565 604	13 767	1 301 083	690 839	523 806	24 107	1 238 752	96	93	175	95
CHINA	126 672	604 483	7 425	738 580	161 139	783 879	7 061	952 079	127	130	95	129
FRANCE	215 773	277 935	23 490	517 198	358 463	462 692	41 193	862 348	166	166	175	167
SWITZERLAND	661 698	745 175	116 199	1 523 072	287 405	528 908	13 491	829 804	43	71	12	54
POLAND	204 086	601 593	36 446	842 125	239 765	559 635	28 526	827 926	117	93	78	98
MAURITIUS *	273 317	197 927	87 048	558 292	273 827	224 529	91 276	589 632	100	113	105	106
LATVIA	285 299	466 176	4 275	755 750	156 311	304 845	2 250	463 406	55	65	53	61
OTHER COUNTRIES	3 495 915	5 447 509	349 794	9 293 218	3 806 180	6 623 984	379 836	10 810 000	109	122	109	116
TOTAL	78 875 648	102 961 700	8 745 998	190 583 346	91 735 344	118 175 082	13 609 178	223 519 604	116	115	156	117

BULK NATURAL WINE EXPORTS (LITRES) PER COUNTRY FOR THE PERIOD JANUARY - DECEMBER

COUNTRY	200701 - 200712				200801 - 200812				TREND 200801 - 200812 / 200701 - 200712			
	WHITE	RED	BLANC DE NOIR / ROSÉ	TOTAL	WHITE	RED	BLANC DE NOIR / ROSÉ	TOTAL	WHITE	RED	BLANC DE NOIR / ROSÉ	TOTAL
GERMANY	15 996 187	23 725 509	4 492 404	44 214 100	17 424 919	29 430 920	4 908 556	51 764 395	109	124	109	117
UNITED KINGDOM	13 379 194	7 140 124	676 988	21 196 306	13 649 710	9 223 117	1 692 980	24 565 807	102	129	250	116
ANGOLA	123 880	7 696 740	360 996	8 181 616	0	23 130 085	0	23 130 085	0	301	0	283
RUSSIA	430 408	571 945	0	1 002 353	15 717 031	1 083 064	290 980	17 091 075	3 652	189	0	1 705
THE NETHERLANDS	3 318 376	4 752 070	2 247 304	10 317 750	2 634 172	4 131 850	1 672 763	8 438 785	79	87	74	82
U.S.A.	506 978	554 060	0	1 061 038	7 885 592	266 700	0	8 152 292	1 555	48	0	768
NEW ZEALAND	3 239 500	1 887 100	0	5 126 600	4 704 080	3 404 120	0	8 108 200	145	180	0	158
FRANCE	2 371 825	3 117 398	938 626	6 427 849	2 331 668	4 233 808	1 000 730	7 566 206	98	136	107	118
CANADA	1 634 351	4 140 651	0	5 775 002	4 126 624	1 804 127	24 150	5 954 901	252	44	0	103
SWITZERLAND	1 646 955	869 386	386 540	2 902 881	2 618 097	1 285 420	531 289	4 434 806	159	148	137	153
BELGIUM	2 445 098	1 840 680	416 680	4 702 458	2 186 910	1 517 857	242 680	3 947 447	89	82	58	84
DENMARK	901 080	2 628 891	11 980	3 541 951	888 980	2 950 148	96 099	3 935 227	99	112	802	111
CHINA	0	511 240	0	511 240	143 440	3 239 504	0	3 382 944	0	634	0	662
AUSTRALIA	95 883	0	0	95 883	2 412 824	864 020	0	3 276 844	2 516	0	0	3 418
CZECH REPUBLIC	72 739	96 000	0	168 739	1 048 210	717 577	0	1 765 787	1 441	747	0	1 046
FINLAND	541 280	168 070	0	709 350	544 340	385 030	24 250	953 620	101	229	0	134
MAURITIUS	243 615	206 183	69 364	519 162	272 785	245 720	118 720	637 225	112	119	171	123
INDIA	190 920	217 260	0	408 180	406 480	94 500	71 320	572 300	213	43	0	140
ITALY	626 130	361 381	48 400	1 035 911	216 932	240 778	48 140	505 850	35	67	99	49
THAILAND	98 524	97 484	0	196 008	143 490	265 450	23 980	432 920	146	272	0	221
NORWAY	0	314 794	0	314 794	48 036	237 460	0	285 496	0	75	0	91
JAPAN	109 200	0	0	109 200	240 120	0	0	240				

EXPORTS: SPIRITS

PRODUCT		DECEMBER			6 MONTHS			12 MONTHS			Litres
		2007	2008	Trend	JUL '07 - DEC '07	JUL '08 - DEC '08	Trend	JAN '07 - DEC '07	JAN '08 - DEC '08	Trend	
Brandy	P	15 424	31 062	201.39	107 960	129 944	120.36	198 464	236 129	118.98	
	B	0	0	-	59 039	66 430	112.52	147 888	252 830	170.96	
Grape-, Cane- Unspecified spirit	P	270	594	220.00	1 110	4 062	365.95	2 868	5 862	204.39	
	B	0	0	-	2 041 904	19 489 279	954.47	2 041 904	34 065 135	1668.30	
Spirit aperitif, Spirit cooler, Bitters	P	1 200	465	38.75	6 429	16 173	251.56	11 429	21 434	187.54	
	B	0	0	-	0	0	-	0	0	-	
Whisky	P	4 548	63 381	1393.60	10 665	94 950	890.30	20 424	134 955	660.77	
	B	0	0	-	4 000	0	0.00	4 000	0	0.00	
Vodka	P	3 582	11 733	327.55	66 494	91 551	137.68	185 420	239 667	129.26	
	B	0	0	-	36 000	0	0.00	101 056	0	0.00	
Rum	P	270	0	0.00	270	180	66.67	2 970	180	6.06	
	B	0	0	-	0	0	-	0	0	-	
Gin	P	1 224	8 622	704.41	36 892	47 511	128.78	98 554	81 579	82.78	
	B	0	0	-	24 600	16 220	65.93	24 600	32 220	130.98	
Liqueur, Vermouth, Aperitif	P	341 439	570 353	167.04	3 644 354	4 075 903	111.84	5 877 580	6 685 029	113.74	
	B	0	0	-	440	0	0.00	440	0	0.00	
TOTALS SPIRITS	P	367 957	686 210	186.49	3 874 174	4 460 274	115.13	6 397 709	7 404 835	115.74	
	B	0	0	-	2 165 983	19 571 929	903.60	2 319 888	34 350 185	1480.68	
	P+B	367 957	686 210	186.49	6 040 157	24 032 203	397.87	8 717 597	41 755 020	478.97	

P=Packaged

B=Bulk

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

WINE EXPORTED IN UNDERMENTIONED CONTAINERS JANUARY TO DECEMBER 2008

COUNTRY	GLASS					TOTAL GLASS JAN-DEC 2008	TOTAL GLASS JAN-DEC 2007	TREND JAN-DEC 2008/2007	BAG-IN-BOX			TOTAL BAG-IN-BOX JAN-DEC 2008	TOTAL BAG-IN-BOX JAN-DEC 2007	TREND JAN-DEC 2008/2007	TOTAL TETRA PACKS JAN-DEC 2008	TOTAL TETRA PACKS JAN-DEC 2007	TREND JAN-DEC 2008/2007	TOTAL LITRE JAN-DEC 2008	TOTAL LITRE JAN-DEC 2007	TREND JAN-DEC 2008/2007
	< 0.750 ℓ	0.750 ℓ	1 ℓ	1.5 ℓ	> 1.5 ℓ				< 3 ℓ	3 ℓ	> 4 ℓ									
UNITED KINGDOM	1 091 383	69 118 355	343 818	95 990	571	70 650 117	55 789 913	126.64	495 690	14 739 819	207 510	15 443 019	10 043 433	153.76	1 200			86 094 336	65 833 346	130.78
SWEDEN	102 398	5 625 023		6 543	72 159	5 806 123	6 040 955	96.11	162 729	21 749 016	65 560	21 977 305	19 878 859	110.56				27 783 428	25 919 814	107.19
THE NETHERLANDS	83 240	20 289 446	20 862	2 606	87	20 396 241	17 879 872	114.07	10 662	414 228	29 940	454 830	829 796	54.81				20 851 071	18 709 668	111.45
GERMANY	13 357	14 729 087	342 705	28 077	9 141	15 122 367	15 035 958	100.57	27 760	306 482	140 720	474 972	291 498	162.94				15 597 339	15 327 456	101.76
DENMARK	8 100	7 767 675	120	70 088	263	7 846 246	6 549 227	119.80	84 546	3 809 775	60	3 894 381	3 272 440	119.01	744			11 740 627	9 822 411	119.53
UNITED STATES OF AMERICA	6 982	8 291 007	240	102 429	18	8 400 676	9 556 131	87.91		71 712	80	71 792	50 109	143.27				8 472 468	9 606 240	88.20
CANADA	2 018	6 645 838		913 101	87	7 561 044	7 178 046	105.34	26 460	20 868		47 328	4 320	1 095.56	3 840	27 264	14.08	7 612 212	7 209 630	105.58
FINLAND	54 077	2 087 033	18	239		2 141 367	2 012 827	106.39	257 616	2 434 218		2 691 834	1 333 815	201.81				4 833 201	3 346 642	144.42
BELGIUM	18 393	4 329 288	130 392	7 365	933	4 486 371	4 676 639	95.33	64 980	212 184	49 620	326 784	193 829	168.59				4 813 155	4 870 468	98.82
REPUBLIC OF IRELAND	227 545	4 025 552	11 118	1 899		4 266 114	4 669 642	91.36	9 990	900	280	11 170	53 352	20.94				4 277 284	4 722 994	90.56
NEW ZEALAND	9 098	2 416 874				2 425 972	606 447	400.03	191 124	180 372		371 496	36 480	1 018.36				2 797 468	642 927	435.11
AUSTRALIA		2 353 446		72		2 353 518	648 725	362.79										2 353 518	648 725	362.79
NIGERIA *	71 561	2 094 300		2 277		2 168 138	1 211 115	179.02					20 280		4 800			2 172 938	1 231 395	176.46
KENYA	61 833	502 709	49 299	6 642	17 760	638 243	816 652	78.15	65 140	26 580	1 047 320	1 139 040	1 370 768	83.10				1 777 283	2 187 420	81.25
JAPAN	1 445	1 467 811		114		1 469 370	1 218 892	120.55		74 988		74 988	26 700	280.85				1 544 358	1 245 592	123.99
NORWAY	4 349	508 865				513 214	439 649	116.73	61 313	911 898		973 211	841 298	115.68	15 792	6 456	244.61	1 502 217	1 287 403	116.69
UNITED ARAB EMIRATES	5 827	794 560	29 115	171		829 673	545 266	152.16	31 312	108 153	499 560	639 025	354 572	180.22				1 468 698	899 838	163.22
RUSSIA	549	1 118 907	1 680	72		1 121 208	1 446 987	77.49		133 164		133 164	95 076	140.06				1 254 372	1 542 063	81.34
TANZANIA	28 654	701 267	1 656	360	540	732 477	727 574	100.67	94 048	8 808	403 420	506 276	573 508	88.28				1 238 753	1 301 822	95.21
CHINA	7 271	844 927	1 800	3 438	3 831	861 267	603 448	142.72	88 630	888	1 000	90 518	135 132	66.98				951 785	738 580	128.87
FRANCE	1 122	818 271		420	18	819 831	509 098	161.04		42 516		42 516	8 100	524.89				862 347	517 198	166.73
SWITZERLAND	2 537	823 547	180	3 228	312	829 804	1 522 773	54.49					300					829 804	1 523 073	54.48
POLAND	206	822 921		198		823 325	822 526	100.10			4 600	4 600	19 600	23.47				822 925	842 126	98.31
MAURITIUS *	14 640	559 278	1 638	5 121		580 677	550 456	105.49	2 656	1 200	5 100	8 956	7 836	114.29				589 633	558 292	105.61
LATVIA		450 806				450 806	694 730	64.89		12 600		12 600	61 020	20.65				463 406	755 750	61.32
OTHER COUNTRIES	67 995	8 275 855	76 413	88 352	111 285	8 619 900	7 330 627	117.59	93 060	745 044	1 252 705	2 090 809	1 863 816	112.18	99 300	98 784	100.52	10 810 009	9 293 227	116.32
TOTAL	1 884 580	167 462 648	1 011 054	1 338 802	217 005	171 914 089	149 084 175	115.31	1 767 716	46 005 423	3 707 475	51 480 614	41 365 937	124.45	124 932	133 248	93.76	223 519 635	190 583 360	117.28
AS % OF TOTAL	0.84	74.92	0.45	0.60	0.10	76.91	78.23		0.79	20.58	1.66	23.03	21.70		0.06	0.07		100.00	100.00	

TYPE OF CONTAINER PER COUNTRY AS % OF TOTAL

COUNTRY	GLASS					TOTAL GLASS JAN-DEC 2008	TOTAL GLASS JAN-DEC 2007	BAG-IN-BOX			TOTAL BAG-IN-BOX JAN-DEC 2008	TOTAL BAG-IN-BOX JAN-DEC 2007	TOTAL TETRA PACKS JAN-DEC 2008	TOTAL TETRA PACKS JAN-DEC 2007	TOTAL LITRE JAN-DEC 2008	TOTAL LITRE JAN-DEC 2007
	< 0.750 ℓ	0.750 ℓ	1 ℓ	1.5 ℓ	> 1.5 ℓ			< 3 ℓ	3 ℓ	> 4 ℓ						
UNITED KINGDOM	57.91	41.27	34.01	7.17	0.26	41.10	37.42	28.04	32.04	5.60	30.00	24.28	0.96		38.52	34.54
SWEDEN	5.43	3.36		0.49	33.25	3.38	4.05	9.21	47.27	1.77	42.69	48.06			12.43	13.60
THE NETHERLANDS	4.42	12.12	2.06	0.19	0.04	11.86	11.99	0.60	0.90	0.81	0.88	2.01			9.33	9.82
GERMANY	0.71	8.80	33.90	2.10	4.21	8.80	10.09	1.57	0.67	3.80	0.92	0.70			6.98	8.04
DENMARK	0.43	4.64	0.01	5.24	0.12	4.56	4.39	4.78	8.28		7.56	7.91		0.56	5.25	5.15
UNITED STATES OF AMERICA	0.37	4.95	0.02	7.65	0.01	4.89	6.41		0.16		0.14	0.12			3.79	5.04
CANADA	0.11	3.97		68.20	0.04	4.40	4.81	1.50	0.05		0.09	0.01	3.07	20.46	3.41	3.78
FINLAND	2.87	1.25		0.02		1.25	1.35	14.57	5.29		5.23	3.22			2.16	1.76
BELGIUM	0.98	2.39	12.90	0.55	0.43	2.61	3.14	3.68	0.46	1.34	0.63	0.47			2.15	2.56
REPUBLIC OF IRELAND	12.07	2.40	1.10	0.14		2.48	3.13	0.57		0.01	0.02	0.13			1.91	2.48
NEW ZEALAND	0.48	1.44				1.41	0.41	10.81	0.39		0.72	0.09			1.25	0.34
AUSTRALIA		1.41		0.01		1.37	0.44								1.05	0.34
NIGERIA *	3.80	1.25		0.17		1.26	0.81					0.05	3.84		0.97	0.65
KENYA	3.28	0.30	4.88	0.50	8.18	0.37	0.55	3.68	0.06	28.25	2.21	3.31			0.80	1.15
JAPAN	0.08	0.88		0.01		0.85	0.82		0.16		0.15	0.06			0.69	0.65
NORWAY	0.23	0.30				0.30	0.29	3.47	1.98		1.89	2.03	12.64	4.85	0.67	0.68
UNITED ARAB EMIRATES	0.31	0.47	2.88	0.01		0.48	0.37	1.77	0.24	13.47	1.24	0.86			0.66	0.47
RUSSIA	0.03	0.67	0.17	0.01		0.65	0.97		0.29		0.26	0.23			0.56	0.81
TANZANIA	1.52	0.42	0.16	0.03	0.25	0.43	0.49	5.32	0.02	10.88	0.98	1.39			0.55	0.68
CHINA	0.39	0.50	0.18	0.26	1.77	0.50	0.40	5.01		0.03	0.18	0.33			0.43	0.39
FRANCE	0.06	0.49		0.03	0.01	0.48	0.34		0.09		0.08	0.02			0.39	0.27
SWITZERLAND	0.13	0.49	0.02	0.24	0.14	0.48	1.02				0.12	0.01			0.37	0.80
POLAND	0.01	0.49		0.01		0.48	0.55			0.12	0.01	0.05			0.37	0.44
MAURITIUS *	0.78	0.33	0.16	0.38		0.34	0.37	0.15		0.14	0.02	0.02			0.26	0.29
LATVIA		0.27				0.26	0.47		0.03		0.02	0.15			0.21	0.40
OTHER COUNTRIES	3.61	4.94	7.56	6.60	51.28	5.01	4.92	5.26	1.62	33.79	4.06	4.51	79.48	74.14	4.84	4.88
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

*As from 1 July 2006 all packaged exports to previously exempted African countries and surrounding islands are reflected in full.

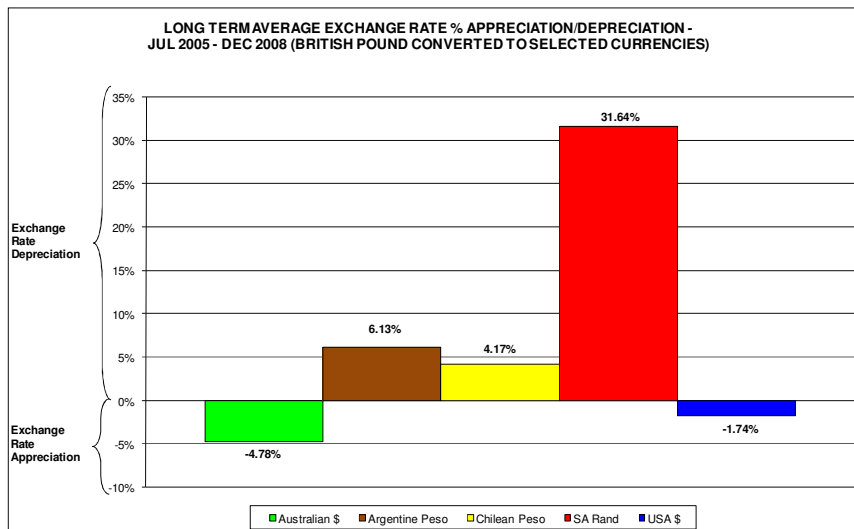
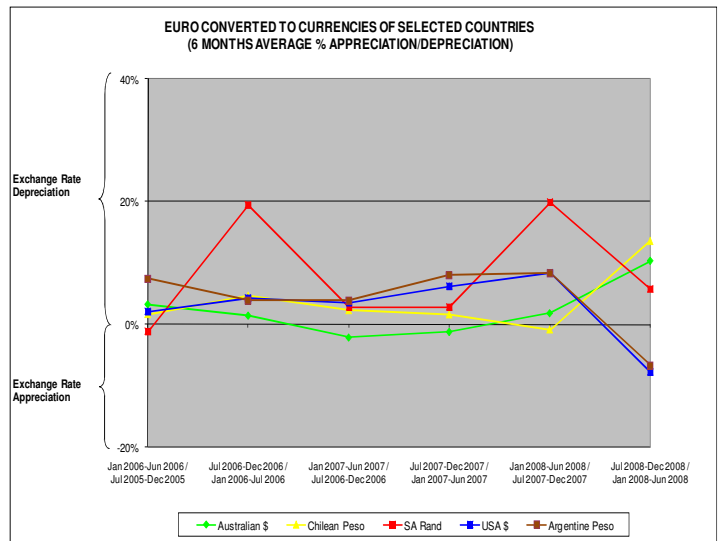
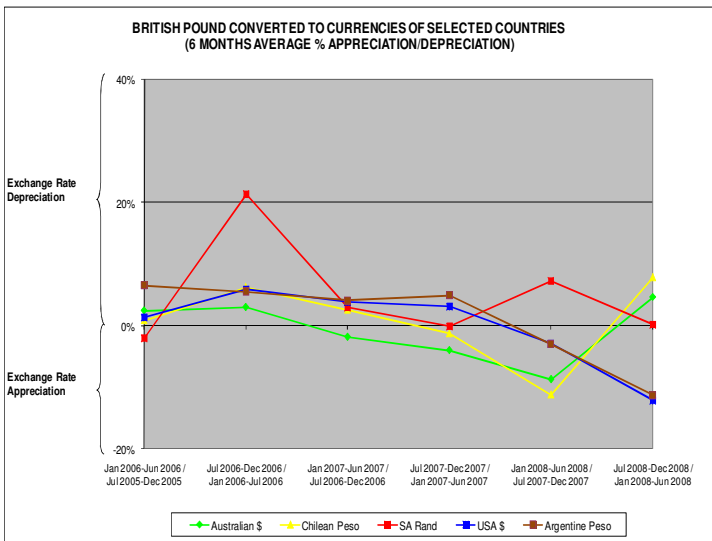
SOURCE: DEPARTMENT OF AGRICULTURE, DIRECTORATE FOOD SAFETY AND QUALITY ASSURANCE

EXCHANGE RATES - SELECTED COUNTRIES

COMPARATIVE EXCHANGE RATES OF SELECTED COUNTRIES (Average rate during period)

	Australian \$	Ave % movement	Argentine Peso	Ave % movement	Chilean Peso	Ave % movement	SA Rand	Ave % movement	USA \$	Ave % movement
Jul 2005-Dec 2005										
1 VSA\$	1.33087		2.94240		540.6653		6.53764		1.00000	
1 Pond	2.35131		5.19900		955.50622		11.55089		1.76715	
1 Euro	1.60312		3.54448		651.55525		7.8679		1.20486	
Jan 2006-Jun 2006		Jan 2006-Jun 2006		Jan 2006-Jun 2006		Jan 2006-Jun 2006		Jan 2006-Jun 2006		Jan 2006-Jun 2006
1 VSA\$	1.34658	1.18%	3.09685	5.25%	538.31955	-0.43%	6.31977	-3.33%	1.00000	0.00%
1 Pond	2.40995	2.49%	5.54335	6.62%	964.08838	0.90%	11.32347	-1.97%	1.79034	1.31%
1 Euro	1.65596	3.30%	3.80898	7.46%	662.41941	1.67%	7.77569	-1.17%	1.23015	2.10%
Jul 2006-Dec 2006		Jul 2006-Dec 2006		Jul 2006-Dec 2006		Jul 2006-Dec 2006		Jul 2006-Dec 2006		Jul 2006-Dec 2006
1 VSA\$	1.31021	-2.70%	3.08606	-0.35%	540.65940	0.43%	7.25111	14.74%	1.00000	0.00%
1 Pond	2.48335	3.05%	5.85078	5.55%	1024.74717	6.29%	13.74547	21.39%	1.89600	5.90%
1 Euro	1.68028	1.47%	3.95842	3.92%	693.42925	4.68%	9.28316	19.39%	1.28276	4.28%
Jan 2007-Jun 2007		Jan 2007-Jun 2007		Jan 2007-Jun 2007		Jan 2007-Jun 2007		Jan 2007-Jun 2007		Jan 2007-Jun 2007
1 VSA\$	1.23810	-5.50%	3.09427	0.27%	533.78055	-1.27%	7.18397	-0.93%	1.00000	0.00%
1 Pond	2.43876	-1.80%	6.09637	4.20%	1051.56851	2.62%	14.15234	2.96%	1.97025	3.92%
1 Euro	1.64554	-2.07%	4.11426	3.94%	709.60154	2.33%	9.54069	2.77%	1.32967	3.66%
Jul 2007-Dec 2007		Jul 2007-Dec 2007		Jul 2007-Dec 2007		Jul 2007-Dec 2007		Jul 2007-Dec 2007		Jul 2007-Dec 2007
1 VSA\$	1.15278	-6.89%	3.14962	1.79%	510.97638	-4.27%	6.95566	-3.18%	1.00000	0.00%
1 Pond	2.34234	-2.95%	6.40215	5.02%	1038.57312	-1.24%	14.13438	-0.13%	2.03269	3.17%
1 Euro	1.62652	-1.16%	4.44706	8.09%	721.11267	1.62%	9.80275	2.75%	1.41191	6.18%
Jan 2008-Jun 2008		Jan 2008-Jun 2008		Jan 2008-Jun 2008		Jan 2008-Jun 2008		Jan 2008-Jun 2008		Jan 2008-Jun 2008
1 VSA\$	1.08281	-6.07%	3.14690	-0.09%	467.19744	-8.57%	7.67753	10.38%	1.00000	0.00%
1 Pond	2.13872	-8.69%	6.21597	-2.91%	922.63706	-11.16%	15.16678	7.30%	1.97524	-2.83%
1 Euro	1.65693	1.87%	4.81787	8.34%	715.10677	-0.83%	11.74889	19.85%	1.53114	8.44%
Jul 2008-Dec 2008		Jul 2008-Dec 2008		Jul 2008-Dec 2008		Jul 2008-Dec 2008		Jul 2008-Dec 2008		Jul 2008-Dec 2008
1 VSA\$	1.30942	20.93%	3.19375	1.49%	580.12747	24.17%	8.87177	15.56%	1.00000	0.00%
1 Pond	2.23889	4.68%	5.51787	-11.23%	995.38841	7.89%	15.20587	0.26%	1.73642	-12.09%
1 Euro	1.82855	10.36%	4.49776	-6.64%	812.66616	13.64%	12.41523	5.67%	1.41277	-7.73%
Jul 2005-Dec 2008		Jul 2005-Dec 2008		Jul 2005-Dec 2008		Jul 2005-Dec 2008		Jul 2005-Dec 2008		Jul 2005-Dec 2008
1 VSA\$		-1.61%		8.54%		7.30%		35.70%		0.00%
1 Pond		-4.78%		6.13%		4.17%		31.64%		-1.74%
1 Euro		14.06%		26.89%		24.73%		57.80%		17.26%

NOTE: A negative average % movement indicates that the exchange rate of the country concerned appreciated against the USA\$, Pound or Euro, the reverse applies to a positive average % movement.
SOURCE: www.oanda.com



IMPORT PARITY PRICES - GUIDELINES

Wine		
Average SA price of B-wine¹- R/L	R 2.71	R 2.71
Transport: Cellar to cellar	R 0.30	R 0.30
Levy	R 0.04	R 0.04
TOTAL - R/L	R 3.05	R 3.05
Import price²		
Exchange rate plus 3 months forward cover: ZAR/USA\$	10.80	10.80
Average world price in \$/L - Ex plant	\$0.280	\$0.300
Shipping and Insurance	\$0.250	\$0.250
Landed price	\$0.53	\$0.55
Price in Rand	R 5.72	R 5.94
Plus customs duty (25% of Ex plant value)	R 0.76	R 0.81
Transport costs and clearing cost ³ from Table Bay for delivery in Western Cape	R 0.30	R 0.30
TOTAL - R/L	R 6.78	R 7.05

1 - B-Wine Standard White wine - Average price for "other white" for the period January to November 2008

2 - Wine from Argentina

3 - Clearing cost - agent commission, handling fee, storage costs.

Important aspects that must be taken into consideration when wine is imported

Contract must be drawn up

Quality must be on specification

Volume and scheduling

Exchange rate with forward cover

Payment terms, bank and financing costs

Establishment of business partnership for International trade (one party that wants to come into market and quotes a lower price, and increase the price later)

Bank guaranteed credit letters.

Grape concentrate	
Average SA juice price - R/Liter @ 17.4°B¹	R 1.24
Conversion to concentrate	
Conversion factor	5.8
Price per litre converted to concentrate	R 7.19
Concentration cost	R 2.80
Total	R 9.99
Overhead fees	R 1.35
Price per litre	R 11.34
10% Profit on Price per litre (0.10 x R 11.34)	R 1.13
	R 12.47
Transport cost and Levies	R 0.45
TOTAL - R/L	R 12.92
Import price	
Exchange rate plus 3 months forward cover: ZAR/USA\$	10.80
Average world price - \$/Ton ex plant	\$1,000
Average world price - \$/Ton freight to Cape Town	\$250
Insurance (x 0.025)	\$25
Customs Duty - 5% of Average world price ex plant	\$50
Transport cost and Clearing cost from Table Bay for delivery in Western Cape	\$25
Total world price - \$/Ton	\$1,350
World price per ton in Rand	R 14,580
Conversion to R per Litre @ 740 L/Ton	R 19.70
TOTAL - R/L	R 19.70

1 - SA Average price for the period 2008

Conversion factor - 5.8 litre Juice at 17.4° Balling gives 1 litre concentrate at 68° Balling

Concentration cost - steam to generate electricity for the conversion process

Overhead costs - Admin costs, quality assurance and marketer cost

10% Profit calculated backward from the market price

Clearing cost - agent commission, handling fee, storage cost

Import of concentrate at a colour spectrum greater than 80% transmission@420nanometres

Important aspects that must be taken into consideration when grapejuice for concentrate is imported

Contract must be drawn up

Local price fixed for a year

Quality must be on specification

Highly perishable product must be verified by third independent person e.g. SGS laboratory

Volume and Scheduling

Exchange rate with forward cover

Payment terms, bank and financing cost

Establishment of business partnership for International trade (one party that wants to come into market and quotes a lower price, and increase the price later)

Bank guaranteed credit letters

No bulk imports (210 litre bin and 14 000 litre holders).

Wine spirit	
Average SA price - R/Litre AA (Distilling wine)¹	R 9.55
Plus: Distilling cost	R 3.00
Transport	R 2.50
Margin	R 1.00
TOTAL - R/Litre AA	R 16.05
Import price	
Exchange rate plus 3 months forward cover: ZAR/USA\$	10.80
Average world price in \$/Litre AA - C&F CPT ²	\$1.25
World price in Rand	R 13.50
Plus: Customs duty ³	R 3.17
Transport cost from Table Bay for delivery in the Western Cape	R 0.20
Clearing cost ⁴	R 0.10
Reprocessing to claim SA origin ⁵	R 2.80
TOTAL - R/Litre AA	R 19.77

1 - Average SA price R0.955 for distilling wine at 10% alcohol strength (2008 average price)

2 - C&F - Cost and Freight on Table Bay

3 - Fixed customs duty of R 3.17/LAA (alcohol strength per volume of 80% and higher)

4 - Eg. harbour costs, agent commission, handling fee, storage cost etc.

5 - Single reprocessing to SA product before it can be used in production of SA product.

Important aspects that must be taken into consideration when wine spirit is imported

Buyers contract with guarantee of payment must be drawn up

Local price is valid for one year

Product must be according to specifications

Volume and scheduling determine price

Quality must be on specifications

Highly perishable product must be verified by third independent person e.g. SGS laboratory

Exchange rate with forward cover

Payment terms, bank and finance cost

Establishment of business partnership for International trade (one party that wants to come into market and quotes a lower price, and increase the price later)

Bank guaranteed credit letter

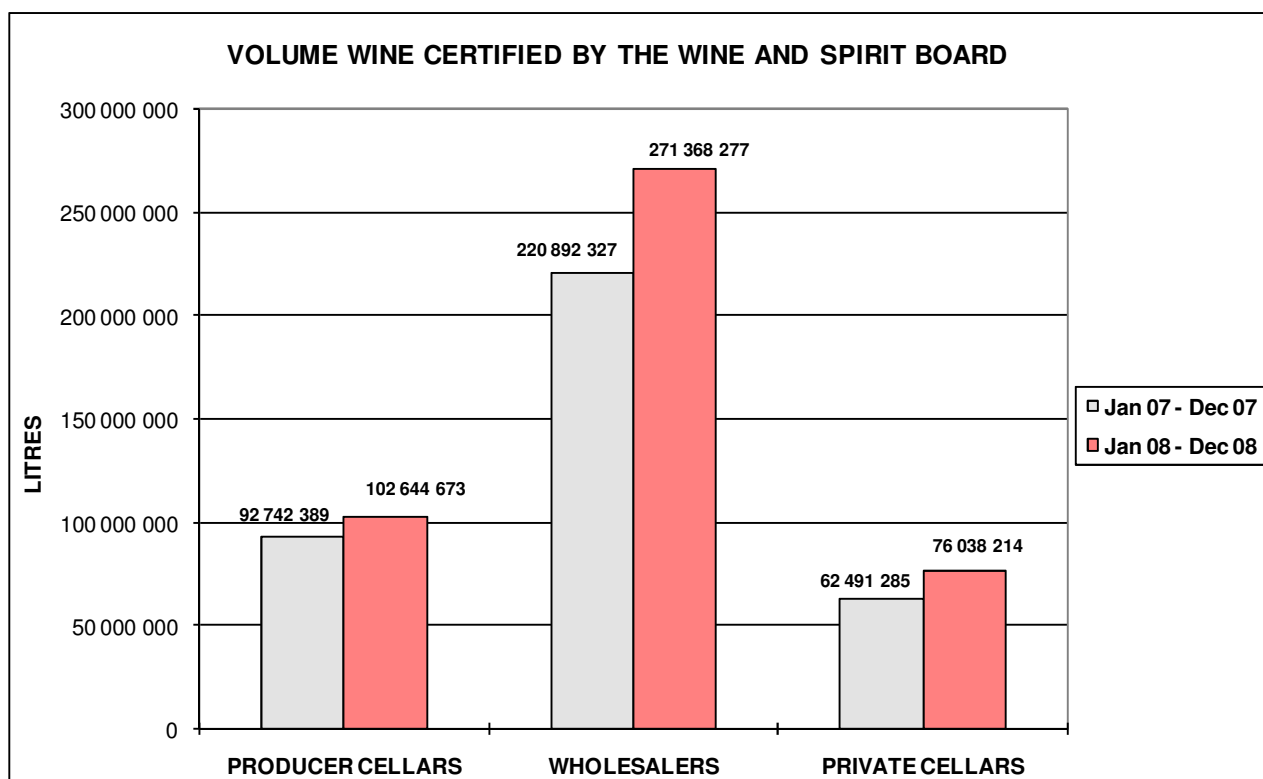
There are no insurance on Spirits

VOLUME OF WINE CERTIFIED (LITRES)

	1 MONTH			3 MONTHS			6 MONTHS			12 MONTHS		
	Dec-07	Dec-08	TREND	Oct-07	Oct-08	TREND	Jul-07	Jul-08	TREND	Jan-07	Jan-08	TREND
	Dec-07	Dec-08		Dec-07	Dec-08		Dec-07	Dec-08		Dec-07	Dec-08	
PRODUCER CELLARS												
Estate Wine	0	0		0	0		0	0		0	0	
Wine of Origin	7 355 742	2 612 742	36	21 315 208	14 400 589	68	35 262 292	33 361 727	95	59 153 032	63 583 771	107
Geographical Unit Wine	2 881 696	2 539 580	88	10 218 201	9 933 733	97	18 890 422	24 718 214	131	33 589 357	39 060 902	116
SUB TOTAL	10 237 438	5 152 322	50	31 533 409	24 334 322	77	54 152 714	58 079 941	107	92 742 389	102 644 673	111
WHOLESALERS												
Estate Wine	0	0		0	0		0	0		0	0	
Wine of Origin	1 783 321	2 753 316	154	7 438 193	10 313 380	139	16 501 874	24 762 894	150	31 258 512	47 110 254	151
Geographical Unit Wine	11 796 139	15 393 116	130	46 765 136	57 830 993	124	94 178 861	123 710 314	131	189 633 815	224 258 023	118
SUB TOTAL	13 579 460	18 146 432	134	54 203 329	68 144 373	126	110 680 735	148 473 208	134	220 892 327	271 368 277	123
PRIVATE CELLARS												
Estate Wine	587 824	811 019	138	1 869 995	2 274 680	122	4 120 939	4 314 526	105	7 695 646	8 118 577	105
Wine of Origin	2 120 573	2 668 994	126	9 781 159	10 102 748	103	20 242 227	21 971 881	109	35 826 937	39 251 654	110
Geographical Unit Wine	1 262 759	1 943 899	154	5 692 918	7 153 443	126	10 820 792	14 820 653	137	18 968 702	28 667 983	151
SUB TOTAL	3 971 156	5 423 912	137	17 344 072	19 530 871	113	35 183 958	41 107 060	117	62 491 285	76 038 214	122
TOTAL	27 788 054	28 722 666	103	103 080 810	112 009 566	109	200 017 407	247 660 209	124	376 126 001	450 051 164	120

CERTIFIED BULK EXPORTS (included in above figures)	1 MONTH			3 MONTHS			6 MONTHS			12 MONTHS		
	Dec-07	Dec-08	TREND	Oct-07	Oct-08	TREND	Jul-07	Jul-08	TREND	Jan-07	Jan-08	TREND
	Dec-07	Dec-08		Dec-07	Dec-08		Dec-07	Dec-08		Dec-07	Dec-08	
	12 226 943	9 049 584	74	38 536 355	37 894 892	98	71 816 241	89 581 059	125	131 833 645	165 696 877	126

*The total volume of wine certified in the 2008 calendar year made up 57.7% of the 2008 wine production (51.5%-2007, 46.6%-2006, 52.9%-2005, 44.1%-2004)



INDUSTRY INFORMATION COMMITTEE MEMBERS

Andries van Tonder - SALBA
 Diaan de Villiers - SALBA
 Paiter Botha - Vinpro
 Bowen Botha - WCSA
 Elias Holtzkampf - SALBA
 Pierre Blake - OWB

Francois Malan - CEWPA
 Jaco Potgieter - SALBA
 Jan Booyesen - Winetech
 Su Birch - WOSA
 Chris Albertyn - SALBA

VOLUME OF WINE CERTIFIED (LITRES) OVERVIEW

Total wine certified increased more than threefold, from 1998 to 2008. The category “Geographical Unit wine “ displayed the strongest growth over this period and represented 64.9% of the total in 2008. “Wine of Origin” also experienced substantial growth during recent years; in 2008 it reached its highest level in the overview period and represented 33.3% of the total. Wholesalers is the grouping which showed the strongest growth during the overview period.

	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	% Change 2008/1998
Producer Cellars												
Estate Wine	0	0	0	0	0	0	0	0	0	0	0	
Wine of Origin	26 856 733	29 317 424	38 052 069	32 888 944	37 470 813	30 888 044	36 628 362	36 030 851	39 845 500	59 153 032	63 583 771	136.8
Geographical Unit Wine	7 502 929	6 441 368	10 667 208	15 300 005	15 883 680	20 308 705	22 515 627	26 409 834	32 652 032	33 589 357	39 060 902	420.6
Sub Total	34 359 662	35 758 792	48 719 277	48 188 949	53 354 493	51 196 749	59 143 989	62 440 685	72 497 532	92 742 389	102 644 673	198.7
Wholesalers												
Estate Wine	0	0	0	0	0	0	0	0	0	0	0	
Wine of Origin	26 362 442	25 119 296	25 984 838	34 231 763	31 697 811	26 488 154	23 627 119	28 549 883	30 886 672	31 258 512	47 110 254	78.7
Geographical Unit Wine	32 525 039	44 559 219	58 766 906	87 154 248	121 610 537	148 215 602	176 294 488	187 701 702	171 513 718	189 633 815	224 258 023	589.5
Sub Total	58 887 481	69 678 515	84 751 744	121 386 011	153 308 348	174 703 756	199 921 607	216 251 585	202 400 390	220 892 327	271 368 277	360.8
Private Cellars												
Estate Wine	11 316 380	11 133 808	12 278 798	11 755 706	11 446 085	10 237 928	9 746 030	7 909 603	8 140 595	7 695 646	8 118 577	- 28.3
Wine of Origin	17 159 150	19 219 309	21 695 374	23 115 968	23 430 068	25 109 115	28 011 566	30 967 830	32 858 585	35 826 937	39 251 654	128.8
Geographical Unit Wine	6 428 593	10 510 076	13 476 900	3 190 871	5 858 452	9 752 347	10 603 202	14 943 539	15 126 064	18 968 702	28 667 983	345.9
Sub Total	34 904 123	40 863 193	47 451 072	38 062 545	40 734 605	45 099 390	48 360 798	53 820 972	56 125 244	62 491 285	76 038 214	117.8
Total Estate	11 316 380	11 133 808	12 278 798	11 755 706	11 446 085	10 237 928	9 746 030	7 909 603	8 140 595	7 695 646	8 118 577	- 28.3
Total Wine of Origin	70 378 325	73 656 029	85 732 281	90 236 675	92 598 692	82 485 313	88 267 047	95 548 564	103 590 757	126 238 481	149 945 679	113.1
Total Geographical Unit Wine	46 456 561	61 510 663	82 911 014	105 645 124	143 352 669	178 276 654	209 413 317	229 055 075	219 291 814	242 191 874	291 986 908	528.5
Total Wine Certified	128 151 266	146 300 500	180 922 093	207 637 505	247 397 446	270 999 895	307 426 394	332 513 242	331 023 166	376 126 001	450 051 164	251.2

