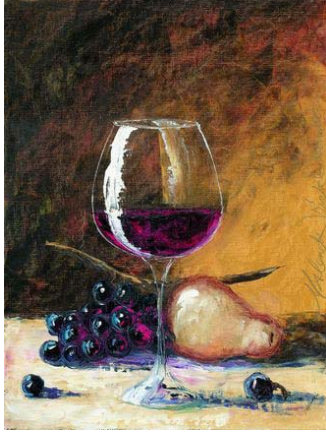


Wine Industry

I N F O R M A T I O N

July 2008



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New World vs. Old World 2003 - 2007

In this month's issue we look at a comparison between the old world and the new world in terms of consumption, production, area under vines and exports from 2003 up to 2007 (pages 13 to 17). In terms of wine consumption for the old world countries France occupies the number one position followed closely by Italy in the second position. For the new world countries the USA consumes more than twice as much as Argentina, which is in the second position. In terms of the overall position between the new world and old world, the USA occupies the 3rd position in terms of consumption.

In terms of wine production with regard to the new world countries the USA is still the leading producer, followed by Argentina, Australia and South Africa. In terms of wine production for the old world countries Italy remains the leading producer, with more than 4 500 million litres, followed by France, Spain and Germany.

In terms of area under vines for the old world countries, Spain still occupies the top position followed by France, which is slightly ahead of Italy. In terms of the new world countries the USA is leading followed by Argentina, Chile, Australia, South Africa and New Zealand.

The last comparison between the new world and old world is that of exports which shows that the old world still dominates, but that the new world is growing at a strong pace, especially Australia and Chile. South Africa is also still showing steady growth in this regard.

Also in this issue – domestic sales and exports of natural wine during May 2008 (page 2), information regarding the price ranges in which wine were sold in bulk for the period January to May 2008 (pages 3 to 7), preliminary 2008 grape prices – trade (page 8), exports of wine and flavoured grape liquor during June 2008 (page 9), exports of natural wine per country (page 10), exports of spirits during June 2008 (page 11), exports in containers for the period January to June 2008 (page 12), exchange rates (pages 18 and 19) and volume of wine certified during June 2008 (page 20).

SAWIS greetings until August
Robin

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DOMESTIC SALES AND EXPORTS OF NATURAL WINE

DOMESTIC SALES OF NATURAL WINE

GROSS LITRE

	1 MONTH		3 MONTHS				6 MONTHS				12 MONTHS				MARKET SHARE		
	MAY 2007	MAY 2008	MAR 2007	MAY 2007	MAR 2008	MAY 2008	TREND	DEC 2006	MAY 2007	DEC 2007	MAY 2008	TREND	JUN 2006	MAY 2007	JUN 2007	MAY 2008	
		TREND		TREND		TREND											
Wholesalers	13 741 691	12 474 907	39 246 286	36 580 019	93.21			83 486 805	81 476 943	97.59			166 126 103	167 015 103	100.54		53.12
Private Cellars	2 922 071	3 083 379	8 465 292	9 709 129	114.69			16 899 170	19 537 170	115.61			33 915 419	39 496 975	116.46		12.56
Producer Cellars	8 055 514	8 610 719	23 488 672	24 773 871	105.47			47 762 614	50 737 710	106.23			98 312 428	107 917 659	109.77		34.32
SUB TOTAL	24 719 276	24 169 005	71 200 250	71 063 019	99.81			148 148 589	151 751 823	102.43			298 353 950	314 429 737	105.39		100.00
Wine component of alc fruit bev	0	0	0	0	0			418 916	0	0			1 942 347	0	0		0.00
TOTAL	24 719 276	24 169 005	71 200 250	71 063 019	99.81			148 567 505	151 751 823	102.14			300 296 297	314 429 737	104.71		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		
	MAY 2007	MAY 2008	MAR 2007	MAY 2007	MAR 2008	MAY 2008	TREND	DEC 2006	MAY 2007	DEC 2007	MAY 2008	TREND	JUN 2006	MAY 2007	JUN 2007	MAY 2008	
		TREND		TREND		TREND											
TOTAL	31 161 401	29 997 666	73 698 643	93 526 068	126.90			137 942 423	172 397 509	124.98			277 972 355	343 955 903	123.74		100.00

DOMESTIC SALES AND EXPORT OF NATURAL WINE

GROSS LITRE

	1 MONTH		3 MONTHS				6 MONTHS				12 MONTHS				MARKET SHARE		
	MAY 2007	MAY 2008	MAR 2007	MAY 2007	MAR 2008	MAY 2008	TREND	DEC 2006	MAY 2007	DEC 2007	MAY 2008	TREND	JUN 2006	MAY 2007	JUN 2007	MAY 2008	
		TREND		TREND		TREND											
TOTAL	55 880 677	54 166 671	144 898 893	164 589 087	113.59			286 509 928	324 149 332	113.14			578 268 652	658 385 640	113.85		100.00

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

PRELIMINARY 2008 GRAPE PRICES - TRADE

SAWIS annually publishes two sets of grape prices, that of "non-producer cellars and that of "producer cellars (delivery by members)". First-mentioned are grape prices of transactions where grapes are sold by primary grape producers/wine producers to wholesalers or by primary grape producers/wine producers to other wine producers (excluding producer cellars). These prices were always published in August of a specific year, but in an attempt to make information available earlier to the industry it was thought fit to publish preliminary prices, but then only in the format as set out in the undermentioned table. It depicts only transactions between primary grape producers/wine producers and wholesalers and will in future be made available in July. In the past this part represented 75% of the complete set of data. The complete set of data will be published in August 2008.

VARIETY	RAND PER TON							2008/2007
	2002	2003	2004	2005	2006	2007	2008	% ±
Cabernet Franc	5 071	5 154	5 353	4 212	2 908	2 760	2 765	0.18
Cabernet Sauvignon	5 372	5 517	5 421	4 119	3 349	2 874	3 096	7.72
Carignan	2 100	2 626	2 700			2 200	4 000	81.82
Cinsaut	2 468	2 657	2 691	2 234	2 009	2 090	2 110	0.96
Gamay Noir	2 692	3 200	3 244	3 000	2 200	2 200	1 820	-17.27
Merlot	5 240	5 329	5 258	3 868	3 162	2 870	3 041	5.96
Petit Verdot	5 397	5 461	5 074	4 101	3 481	3 392	3 502	3.24
Pinot Noir	4 149	4 812	5 062	4 517	4 041	4 098	4 532	10.59
Pinotage	4 598	4 771	4 364	3 165	2 537	2 597	2 684	3.35
Roobernet	4 055	4 883	3 393	2 567	1 629	2 892	3 480	20.33
Ruby Cabernet	3 756	3 825	3 642	2 694	1 815	1 878	1 649	-12.19
Shiraz	4 836	4 966	4 863	3 688	2 853	3 136	3 228	2.93
Tinta Barocca	2 979	3 102	3 212	3 156	1 400		2 432	
Other red varieties	4 523	4 241	4 391	4 121	3 477	3 037	3 373	11.06
Total all red varieties	4 805	4 939	4 842	3 738	3 044	2 898	3 070	5.94
Bukettraube	850	1 100	1 250	1 500	1 669	1 632	1 650	1.10
Cape Riesling	1 396	1 615	1 754	2 040	2 048	2 370	2 418	2.03
Chardonnay	3 007	3 570	3 714	3 841	3 707	3 572	3 863	8.15
Chenin blanc	1 038	1 695	1 998	2 201	2 264	2 499	2 746	9.88
Clairette blanche	600	716	800	1 000	966	1 000	1 000	0.00
Colombar	753	994	1 408	1 535	997	1 871	1 787	-4.49
French grape	700	697	652					
Gewürztraminer	2 233	3 381	1 863	2 695	3 018	2 504	2 796	11.66
Hanepoot White	834	713	913	1 003	1 103	2 153	2 432	12.96
Muscadel white	1 610	1 038	5 284	3 732	3 610	5 394	6 152	14.05
Pinot gris	2 000	2 887	2 827	3 062	1 094	1 786	2 814	57.56
Sauvignon blanc	3 333	3 543	3 982	4 344	4 465	4 462	4 586	2.78
Sémillon	1 723	2 470	2 677	2 543	2 861	2 762	3 005	8.80
Viognier	2 907	3 601	3 925	3 942	4 011	3 906	3 826	-2.05
Weisser Riesling	2 008	2 634	2 856	3 570	4 060	3 937	4 293	9.04
Other white varieties	2 462	893	1 450	2 061	2 523	3 122	3 852	23.38
Total all white varieties	2 305	2 442	2 998	3 394	3 436	3 620	3 868	6.85
Total all varieties	3 835	3 936	4 254	3 630	3 173	3 118	3 334	6.93
As % of total grape production	5.44	7.21	6.60	7.35	7.39	6.51	6.42	

RSA EXPORTS: WINE AND FLAVOURED GRAPE LIQUOR

PRODUCT		Litres								
		JUNE			6 MONTHS			12 MONTHS		
		2007	2008	Trend	JAN '07 - JUN '07	JAN '08 - JUN '08	Trend	JUL '06 - JUN '07	JUL '07 - JUN '08	Trend
Chardonnay	P	1 438 393	1 953 714	135.83	7 488 936	8 282 863	110.60	14 844 405	17 433 670	117.44
	B	350 180	562 633	160.67	1 892 349	5 484 231	289.81	3 904 707	7 976 933	204.29
Sauvignon Blanc	P	1 260 308	1 453 154	115.30	5 997 093	6 975 121	116.31	12 617 954	14 226 434	112.75
	B	313 503	428 780	136.77	1 138 152	2 185 021	191.98	2 537 076	4 028 338	158.78
Chenin Blanc	P	1 986 471	2 088 637	105.14	8 650 899	8 809 627	101.83	15 920 059	17 136 233	107.64
	B	1 752 740	2 405 153	137.22	10 446 411	10 228 532	97.91	20 739 274	22 112 187	106.62
Other White	P	3 117 043	3 667 165	117.65	15 643 998	18 098 652	115.69	32 811 148	34 484 197	105.10
	B	1 734 996	3 043 695	175.43	6 358 170	18 453 938	290.24	13 190 754	30 371 305	230.25
TOTALS WHITE WINE	P	7 802 215	9 162 670	117.44	37 780 926	42 166 263	111.61	76 193 566	83 280 534	109.30
	B	4 151 419	6 440 261	155.13	19 835 082	36 351 722	183.27	40 371 811	64 488 763	159.74
	P+B	11 953 634	15 602 931	130.53	57 616 008	78 517 985	136.28	116 565 377	147 769 297	126.77
Cabernet Sauvignon	P	1 038 818	905 537	87.17	6 233 981	6 197 467	99.41	12 522 585	13 293 795	106.16
	B	482 851	670 447	138.85	2 629 380	2 742 971	104.32	4 346 482	6 115 385	140.70
Shiraz	P	1 101 447	1 376 063	124.93	6 716 154	7 743 387	115.29	13 457 747	15 834 173	117.66
	B	73 292	123 255	168.17	535 695	2 553 747	476.72	1 022 505	4 060 428	397.11
Pinotage	P	718 935	993 191	138.15	4 513 941	4 648 272	102.98	8 449 031	8 800 676	104.16
	B	640 050	740 125	115.64	3 745 087	3 365 873	89.87	8 027 428	8 157 948	101.63
Merlot	P	740 970	389 879	52.62	3 345 347	3 706 220	110.79	7 245 982	7 361 722	101.60
	B	144 220	98 201	68.09	823 793	1 810 770	219.81	1 650 226	3 107 165	188.29
Other Red	P	5 091 336	5 979 039	117.44	27 663 013	30 061 929	108.67	55 688 120	61 590 707	110.60
	B	3 162 423	7 594 351	240.14	17 595 244	32 696 929	185.83	33 823 296	57 569 170	170.21
TOTALS RED WINE	P	8 691 506	9 643 709	110.96	48 472 436	52 357 275	108.01	97 363 465	106 881 073	109.78
	B	4 502 836	9 226 379	204.90	25 329 199	43 170 290	170.44	48 869 937	79 010 096	161.67
	P+B	13 194 342	18 870 088	143.02	73 801 635	95 527 565	129.44	146 233 402	185 891 169	127.12
Blanc de Noir + Rosé	P	1 218 958	2 039 105	167.28	4 853 844	7 187 521	148.08	7 693 137	11 090 595	144.16
	B	1 558 726	2 449 450	157.14	6 094 949	6 547 259	107.42	9 060 428	10 101 592	111.49
	P+B	2 777 684	4 488 555	161.59	10 948 793	13 734 780	125.45	16 753 565	21 192 187	126.49
TOTALS NATURAL WINE	P	17 712 679	20 845 484	117.69	91 107 206	101 711 059	111.64	181 250 168	201 252 202	111.04
	B	10 212 981	18 116 090	177.38	51 259 230	86 069 271	167.91	98 302 176	153 600 451	156.25
	P+B	27 925 660	38 961 574	139.52	142 366 436	187 780 330	131.90	279 552 344	354 852 653	126.94
Fortified Wine	P	32 414	25 269	77.96	175 466	132 987	75.79	465 294	339 341	72.93
	B	0	0	-	0	0	-	33 454	23 876	71.37
	P+B	32 414	25 269	77.96	175 466	132 987	75.79	498 748	363 217	72.83
Sparkling wine	P	96 888	294 849	304.32	943 559	1 537 581	162.96	2 456 203	3 373 386	137.34
TOTALS ALL WINE	P	17 841 981	21 165 602	118.63	92 226 231	103 381 627	112.10	184 171 665	204 964 929	111.29
	B	10 212 981	18 116 090	177.38	51 259 230	86 069 271	167.91	98 335 630	153 624 327	156.22
	P+B	28 054 962	39 281 692	140.02	143 485 461	189 450 898	132.03	282 507 295	358 589 256	126.93
OTHER(e.g. for vinegar, industrial)	P	0	0	-	0	0	-	0	0	-
	B	0	0	-	0	528 521	-	0	696 676	-
	P+B	0	0	-	0	528 521	-	0	696 676	-
Flavoured Grape Liquor	P	408	13 053	3199.26	12 702	15 522	122.20	13 000	15 522	119.40
TOTALS ALL PRODUCTS	P	17 842 389	21 178 655	118.70	92 238 933	103 397 149	112.10	184 184 665	204 980 451	111.29
	B	10 212 981	18 116 090	177.38	51 259 230	86 597 792	168.94	98 335 630	154 321 003	156.93
	P+B	28 055 370	39 294 745	140.06	143 498 163	189 994 941	132.40	282 520 295	359 301 454	127.18

P=Packaged

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

B=Bulk

RSA EXPORTS: SPIRITS

PRODUCT		JUNE			6 MONTHS			12 MONTHS			Litres
		2007	2008	Trend	JAN '07 - JUN '07	JAN '08 - JUN '08	Trend	JUL '06 - JUN '07	JUL '07 - JUN '08	Trend	
		Brandy	P	24 740	13 531	54.69	90 503	106 184	117.33	190 926	214 145
	B	0	57 600	-	88 850	186 400	209.79	139 000	245 439	176.57	
Grape-, Cane- Unspecified spirit	P	390	99	25.38	1 758	1 800	102.39	5 156	2 910	56.44	
	B	0	0	-	0	14 575 856	-	0	16 617 760	-	
Spirit aperitif, Spirit cooler, Bitters	P	912	2 663	292.00	5 000	5 261	105.22	12 207	11 690	95.76	
	B	0	0	-	0	0	-	0	0	-	
Whisky	P	7 725	5 430	70.29	9 759	40 005	409.93	27 396	50 670	184.95	
	B	0	0	-	0	0	-	0	4 000	-	
Vodka	P	75 207	11 364	15.11	118 926	148 116	124.54	205 125	214 610	104.62	
	B	0	0	-	65 056	0	0.00	100 156	36 000	35.94	
Rum	P	0	0	-	2 700	0	0.00	3 960	270	6.82	
	B	0	0	-	0	0	-	0	0	-	
Gin	P	24 225	7 425	30.65	61 662	34 068	55.25	117 231	70 960	60.53	
	B	0	0	-	0	16 000	-	0	40 600	-	
Liqueur, Vermouth, Aperitif	P	348 062	317 491	91.22	2 233 226	2 609 127	116.83	5 313 726	6 253 481	117.69	
	B	0	0	-	0	0	-	0	440	-	
TOTALS SPIRITS	P	481 261	358 003	74.39	2 523 534	2 944 561	116.68	5 875 727	6 818 736	116.05	
	B	0	57 600	-	153 906	14 778 256	9602.13	239 156	16 944 239	7085.02	
	P+B	481 261	415 603	86.36	2 677 440	17 722 817	661.93	6 114 883	23 762 975	388.61	

P=Packaged

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

B=Bulk

WINE EXPORTED IN UNDERMENTIONED CONTAINERS JANUARY TO JUNE 2008

COUNTRY	GLASS					TOTAL GLASS JAN-JUN 2008	TOTAL GLASS JAN-JUN 2007	TREND JAN-JUN 2008/2007	BAG-IN-BOX			TOTAL BAG-IN-BOX JAN-JUN 2008	TOTAL BAG-IN-BOX JAN-JUN 2007	TREND JAN-JUN 2008/2007	TOTAL TETRA PACKS JAN-JUN 2008	TOTAL TETRA PACKS JAN-JUN 2007	TREND JAN-JUN 2008/2007	TOTAL LITRE JAN-JUN 2008	TOTAL LITRE JAN-JUN 2007	TREND JAN-JUN 2008/2007
	< 0.750 ℓ	0.750 ℓ	1 ℓ	1.5 ℓ	> 1.5 ℓ				< 3 ℓ	3 ℓ	> 4 ℓ				1 ℓ	1 ℓ				
	UNITED KINGDOM	413 476	30 793 141	144 210	61 145				130	31 412 102	25 199 769				124.65	262 050		6 758 394	2 950	
SWEDEN	32 582	2 882 979		5 877	72 111	2 993 549	3 079 250	97.22	66 501	10 251 468	28 400	10 346 369	10 751 034	96.24			13 339 918	13 830 284	96.45	
THE NETHERLANDS	6 473	9 794 849	17 820	945	81	9 820 168	9 724 787	100.98	8 262	216 948	18 220	243 430	463 624	52.51			10 063 598	10 188 411	98.77	
GERMANY	2 198	7 449 750	156 183	6 464	1 539	7 616 134	7 550 578	100.87	15 680	134 712	44 920	195 312	123 784	157.78			7 811 446	7 674 362	101.79	
DENMARK	2 684	3 605 219	120	29 910	263	3 638 196	3 416 940	106.48	56 448	1 885 779	60	1 942 287	1 756 356	110.59			5 580 483	5 173 296	107.87	
CANADA	1 001	3 234 008		442 985		3 677 994	3 340 949	110.09		3 768		3 768	3 420	110.18	3 840	20 544	18.69	3 685 602	3 364 913	109.53
UNITED STATES OF AMERICA	3 845	3 386 817	240	32 238		3 423 140	3 967 938	86.27		51 072		51 072	1 620	3 152.59			3 474 212	3 969 558	87.52	
BELGIUM	2 830	2 226 078	77 472	4 080	6	2 310 466	2 526 821	91.44	20 832	106 302	23 760	150 894	106 075	142.25			2 461 360	2 632 896	93.48	
FINLAND	27 921	1 020 123	18	90		1 048 152	1 037 165	101.06	78 444	1 191 090		1 269 534	737 268	172.19			2 317 686	1 774 433	130.62	
REPUBLIC OF IRELAND	157 615	1 751 918		216		1 909 749	2 163 156	88.29					34 632				1 909 749	2 197 788	86.89	
NEW ZEALAND	2 213	766 476				788 689	105 786	726.65		74 640		74 640	11 280	661.70			843 329	117 066	720.39	
NORWAY	3 002	234 882				237 884	179 921	132.22	23 087	465 672		488 759	432 656	112.97	4 992	1 560	320.00	731 635	614 137	119.13
UNITED ARAB EMIRATES	3 640	428 462	13 095	90		445 287	284 380	156.58	8 880	32 652	240 280	281 812	169 144	166.61			727 099	453 524	160.32	
JAPAN	860	671 081		114		672 055	628 409	106.95		50 664		50 664	15 300	331.14			727 719	643 709	112.27	
NIGERIA *	11 215	709 367		1 017		721 599	422 496	170.79									721 599	422 496	170.79	
AUSTRALIA		684 405		72		684 477	31 212	2 192.99									684 477	31 212	2 192.99	
TANZANIA	15 997	399 155	45	90		415 287	300 666	138.12	47 760	3 744	207 100	258 604	231 688	111.62			673 891	532 354	126.59	
RUSSIA	270	616 217		72		616 559	697 073	88.45		20 592		20 592	42 120	48.89			637 511	739 193	86.20	
KENYA	40 490	147 681	11 505	4 770	3 900	208 346	251 412	82.87	24 272	6 000	387 320	417 592	447 188	93.38			625 938	698 600	89.60	
CHINA	6 486	375 251		90		381 827	239 114	159.68	59 652			59 652	71 820	83.06			441 479	310 934	141.98	
POLAND		421 628				421 628	296 488	142.21			1 600	1 600	6 000	26.67			423 228	302 488	139.92	
SWITZERLAND	1 215	375 434	180	1 721	96	378 646	691 038	54.79									378 646	691 038	54.79	
FRANCE	1 092	322 614		330	18	324 054	299 645	108.15		26 160		26 160					350 214	299 645	116.88	
MAURITIUS *	6 624	250 520	450	396		257 990	221 507	116.47	1 216		2 500	3 716	3 704	100.32			261 706	225 211	116.20	
LATVIA		199 499				199 499	451 845	44.15		3 600		3 600	55 020	6.54			203 099	506 865	40.07	
OTHER COUNTRIES	30 589	3 219 519	29 265	29 297	29 193	3 337 863	3 302 638	101.07	22 670	284 508	494 460	801 638	798 900	100.34	65 820	50 028	131.57	4 205 321	4 151 566	101.29
TOTAL	774 318	75 967 073	450 603	622 009	107 337	77 921 340	70 410 983	110.67	695 754	21 567 765	1 451 570	23 715 089	20 624 099	114.99	74 652	72 132	103.49	101 711 081	91 107 214	111.64
AS % OF TOTAL	0.76	74.69	0.44	0.61	0.11	76.61	77.28		0.68	21.20	1.43	23.32	22.64		0.07	0.08		100.00	100.00	

TYPE OF CONTAINER PER COUNTRY AS % OF TOTAL

COUNTRY	GLASS					TOTAL GLASS JAN-JUN 2008	TOTAL GLASS JAN-JUN 2007	BAG-IN-BOX			TOTAL BAG-IN-BOX JAN-JUN 2008	TOTAL BAG-IN-BOX JAN-JUN 2007	TETRA PACKS JAN-JUN 2008		TOTAL LITRE JAN-JUN 2008	TOTAL LITRE JAN-JUN 2007
	< 0.750 ℓ	0.750 ℓ	1 ℓ	1.5 ℓ	> 1.5 ℓ			< 3 ℓ	3 ℓ	> 4 ℓ			1 ℓ	1 ℓ		
	UNITED KINGDOM	53.40	40.53	32.00	9.83			0.12	40.31	35.79			37.66	31.34		
SWEDEN	4.21	3.80		0.94	67.18	3.84	4.37	9.56	47.53	1.96	43.63	52.13			13.12	15.18
THE NETHERLANDS	0.84	12.89	3.95	0.15	0.08	12.80	13.81	1.19	1.01	1.26	1.03	2.25			9.89	11.18
GERMANY	0.28	9.81	34.66	1.04	1.43	9.77	10.72	2.25	0.62	3.09	0.82	0.60			7.68	8.42
DENMARK	0.35	4.75	0.03	4.81	0.25	4.67	4.85	8.11	8.74		8.19	8.52			5.49	5.68
CANADA	0.13	4.26		71.22		4.72	4.74			0.02	0.02	0.02	5.14	28.48	3.62	3.69
UNITED STATES OF AMERICA	0.50	4.46	0.05	5.18		4.39	5.64		0.24		0.22	0.01			3.42	4.36
BELGIUM	0.37	2.93	17.19	0.66	0.01	2.97	3.59	2.99	0.49	1.64	0.64	0.51			2.42	2.89
FINLAND	3.61	1.34		0.01		1.35	1.47	11.27	5.52		5.35	3.57			2.28	1.95
REPUBLIC OF IRELAND	20.36	2.31		0.03		2.45	3.07					0.17			1.88	2.41
NEW ZEALAND	0.29	1.01				0.99	0.15		0.35		0.31	0.05			0.83	0.13
NORWAY	0.39	0.31				0.31	0.26	3.32	2.16		2.06	2.10	6.69	2.16	0.72	0.67
UNITED ARAB EMIRATES	0.47	0.56	2.91	0.01		0.57	0.40	1.28	0.15	16.55	1.19	0.82			0.71	0.50
JAPAN	0.11	0.88		0.02		0.86	0.89		0.23		0.21	0.07			0.71	0.71
NIGERIA *	1.45	0.93		0.16		0.93	0.60								0.71	0.46
AUSTRALIA		0.90		0.01		0.88	0.04								0.67	0.03
TANZANIA	2.07	0.53	0.01	0.01		0.53	0.43	6.86	0.02	14.27	1.09	1.12			0.66	0.58
RUSSIA	0.03	0.81		0.01		0.79	0.99		0.10		0.09	0.20			0.63	0.81
KENYA	5.23	0.19	2.55	0.77	3.63	0.27	0.36	3.49	0.03	26.68	1.76	2.17			0.62	0.77
CHINA	0.84	0.49		0.01		0.49	0.34	8.57			0.25	0.35			0.43	0.34
POLAND		0.56				0.54	0.42			0.11	0.01	0.03			0.42	0.33
SWITZERLAND	0.16	0.49	0.04	0.28	0.09	0.49	0.98								0.37	0.76
FRANCE	0.14	0.42		0.05	0.02	0.42	0.43		0.12		0.11				0.34	0.33
MAURITIUS *	0.86	0.33	0.10	0.06		0.33	0.31	0.17		0.17	0.02	0.02			0.26	0.25
LATVIA		0.26				0.26	0.64		0.02		0.02	0.27			0.20	0.56
OTHER COUNTRIES	3.95	4.24	6.49	4.71	27.20	4.28	4.69	3.26	1.32	34.06	3.38	3.87			4.13	4.56
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

NEW WORLD VS OLD WORLD: CONSUMPTION

Global wine consumption

Global wine consumption dropped a slight 0.04% in 2007. Consumption in the EU-15 has decreased once again, despite a restarting of increased consumption in the United Kingdom (which in 2006 made a pause in its increasing trend evolution over the past 15 years). In effect, traditional large producers and consumers continue a decreasing trend. The first estimations indicate that consumption levels in the EU-15 decreased in 2007 to 12 620 million litres (-70 million litres / 2006).

Wine consumption has been increasing at a substantial rate in the USA (with a domestic market on line with Italy and Oceania). Argentina still have a domestic market close to 1 100 million litres and South Africa a domestic market close to 350 million litres (with a slight increase recorded in 2007), while Switzerland has continued to experience an increasing dwindling demand in 2007. Elsewhere, results are heading toward stabilisation, following varying ups and downs in countries such as Romania (following a catastrophic harvest in 2005), and slight growth in Chile, following a long period with declining consumption.

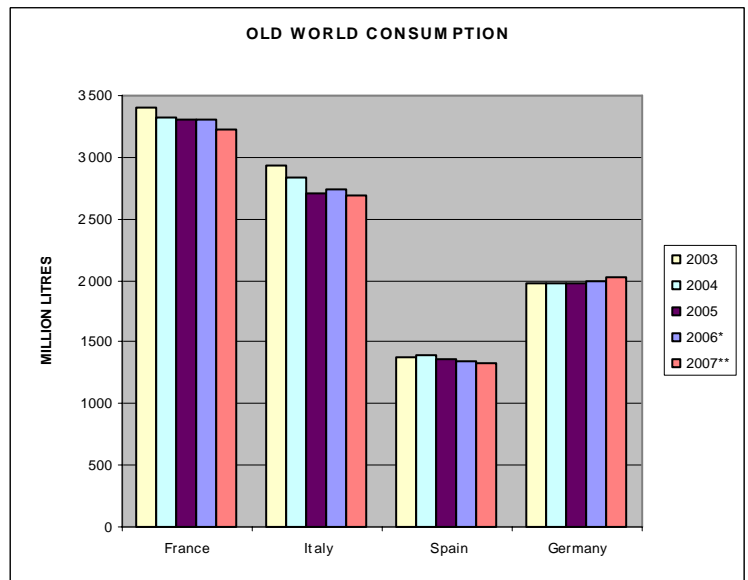
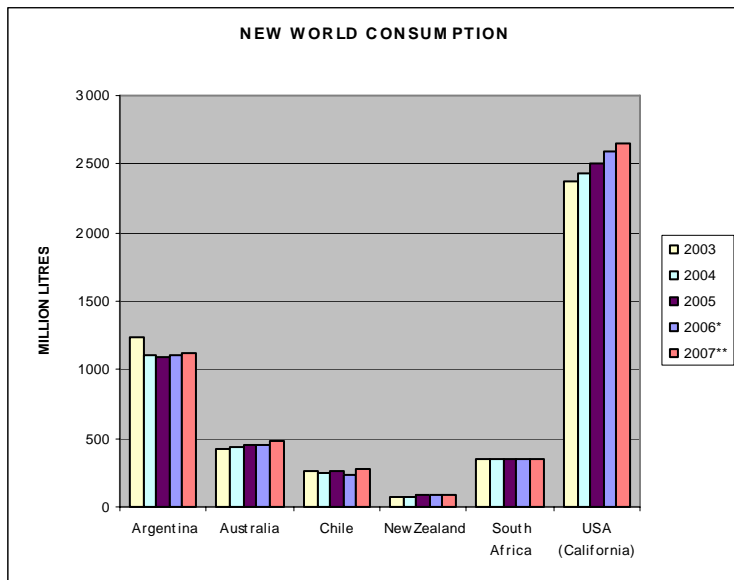
Wine consumption

	2006*	2007**
	'000 litres	
EU-15		
Austria	245 000	250 000
Belgium & Luxembourg	316 000	306 000
Denmark	160 600	160 000
Finland	52 400	53 000
France	3 300 300	3 216 900
Germany	1 993 800	2 026 800
Greece	320 000	330 000
Ireland	70 800	73 400
Italy	2 733 200	2 690 000
Netherlands	351 100	351 000
Portugal	479 300	470 000
Spain	1 351 400	1 327 100
Sweden	146 200	160 000
UK	1 170 000	1 210 000
Total EU-15	12 690 100	12 624 200
Countries outside EU-15		
Argentina	1 110 400	1 116 600
Australia	458 300	479 500
Brazil	346 600	330 000
Chile	238 000	280 000
New Zealand	87 000	88 700
Norway	63 300	65 800
Romania	554 600	508 000
South Africa	345 900	356 600
Switzerland	277 100	250 500
USA	2 590 000	2 650 000
Others	5 308 700	5 310 100
Total countries outside EU-15	11 379 900	11 435 800
TOTAL	24 070 000	24 060 000

*Provisional

**Forecast

Source: OIV



PRODUCTION (not including juice and must)

Global wine production

Global wine production (not including juice and must) has decreased by 6.9% in 2007. Like 2002, it has been recorded as one of the lowest productions in Europe over the last 15 years. Significant evolutions occurred particularly in Portugal, Italy, and France and in Spain to a lesser extent (respectively -760, -690, -180 and -350 million litres), while Germany together with Austria, Bulgaria, Hungary and Romania recorded significant growth in production.

Growth was recorded in South Africa and New Zealand, although 2006 production levels were already substantial (respectively 980 and 150 million litres in 2007, not including juice and must). This trend was also followed by Brazil, reaching 330 million litres in 2007. While Argentina and Chile have recorded slight drops in production, levels are still high (respectively 1 500 and 820 million litres, not including juice and musts - which have also recorded substantial levels). Australia recorded a noticeable decrease in production, particularly linked to significant water deficiency, and reached under 1 000 million litres compared to 1 430 million litres in 2006 (960 million litres in 2007 or -33%).

Measured by the difference between world production and consumption of wine, the degree of equilibrium in 2007 is estimated between 1 720 and 3 510 million litres compared to 4 590 million litres in 2006 and 4 510 million litres in 2005.

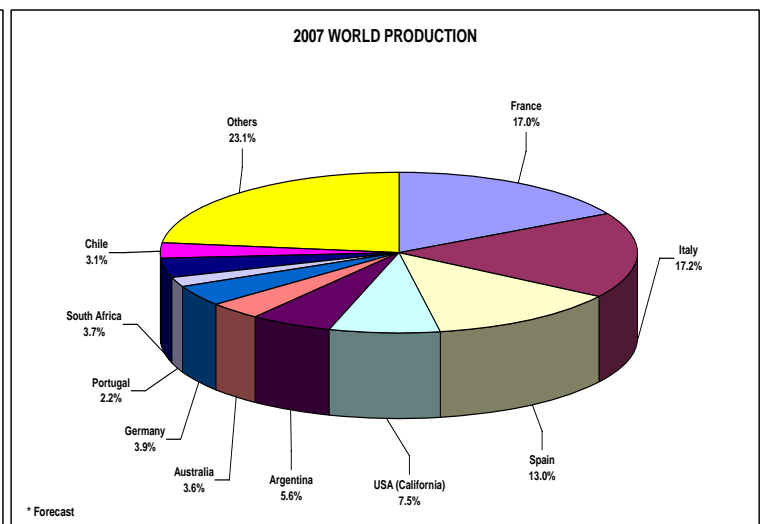
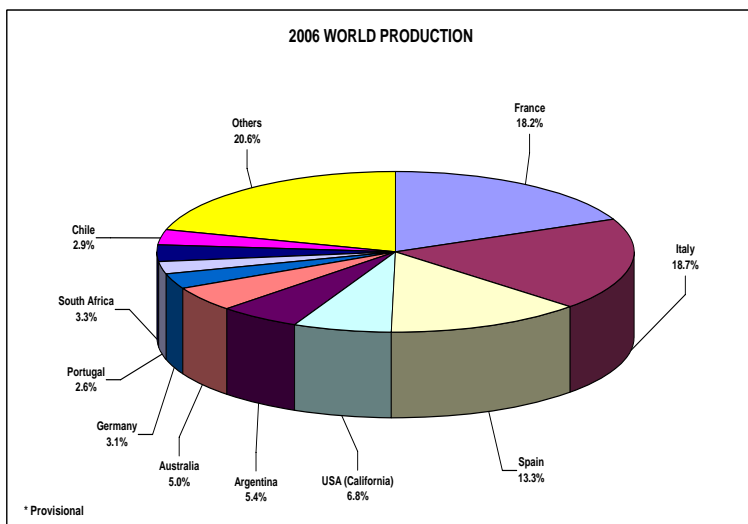
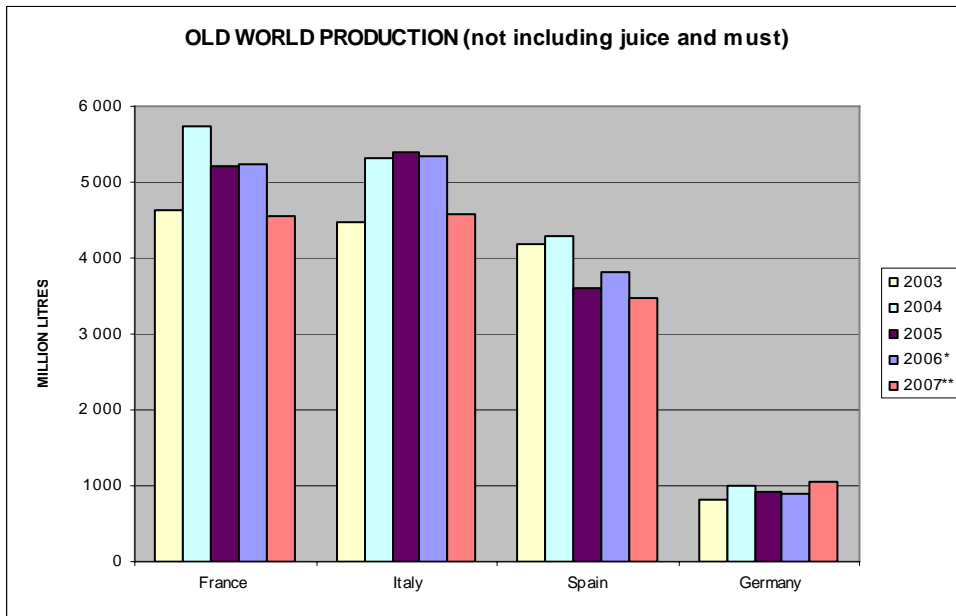
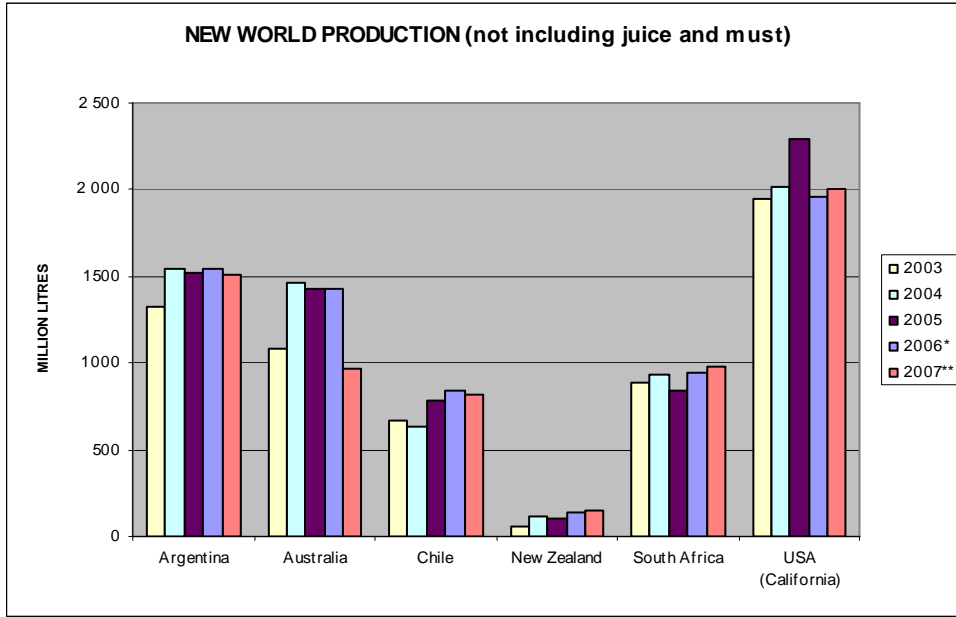
Wine production

	2006*	2007**
	'000 litres	
EU-27		
Austria	225 600	262 800
Bulgaria	175 700	209 000
France	5 227 600	4 540 000
Germany	891 600	1 050 000
Greece	393 800	350 000
Hungary	327 100	370 000
Italy	5 346 200	4 590 000
Portugal	753 200	576 200
Romania	501 400	530 000
Spain	3 817 300	3 470 000
Others	176 700	229 200
Total EU-27	17 836 200	16 177 200
Countries outside EU-27		
Argentina	1 539 600	1 504 600
Australia	1 429 800	962 000
Brazil	237 200	333 700
Chile	844 900	822 700
New Zealand	133 200	147 600
South Africa	940 700	984 000
Switzerland	101 100	104 000
USA	1 962 100	2 000 000
Others	3 635 200	3 634 200
Total countries outside EU-27	10 823 800	10 492 800
TOTAL	28 660 000	26 670 000

*Provisional

**Forecast

Source: OIV



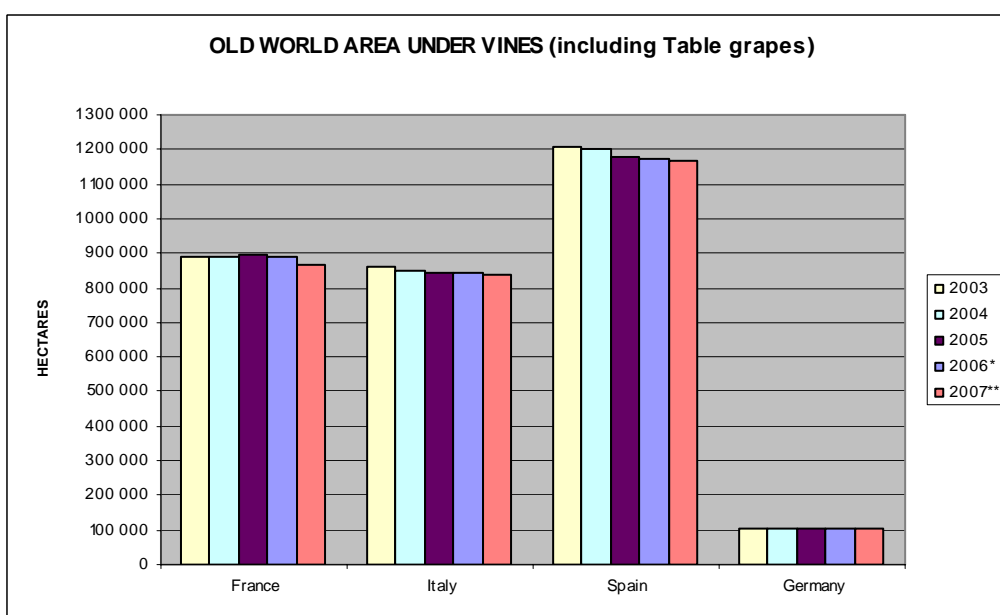
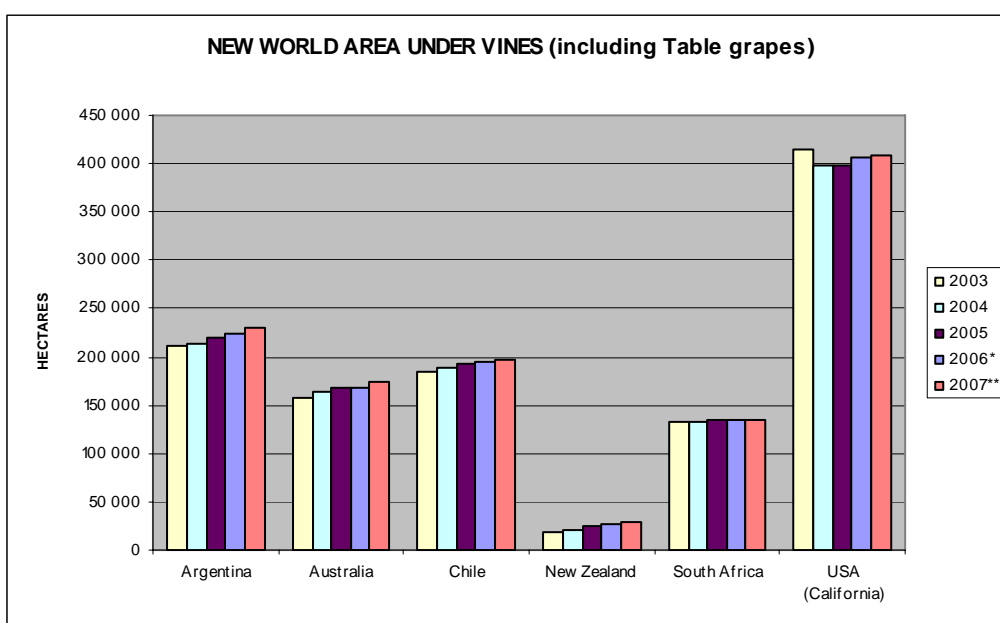
AREA UNDER VINES (including Table Grapes)

Global area under vines

The evolution in EU-27 vineyards continues to be the consequence of the combined effect of vineyard restructuring and the impact of the wine crisis caused by high European and world production levels in 2004. This continued erosion of vineyards started several seasons ago, particularly in France, where uprootings have resulted in a further decrease of 20 000 hectares in 2007. As such the EU-27 area under vines amounted to 3 844 000 hectares in 2007, a decrease of 36 000 hectares compared to 2006.

Despite a pause in heavy growth between 2005 and 2006, growth outside the EU-27 vineyards continues. In 2007, area under vines outside the EU-27 increased by 27 000 hectares to reach 4 055 000 hectares, with substantial growth recorded in South America and Oceania (respectively +15 000 and +8 000 hectares).

As such, total worldwide area under vines, with its contradictory trends, should almost completely stabilise between 2006 and 2007, at approximately 7 900 000 hectares.



*Provisional
**Forecast
Source: OIV

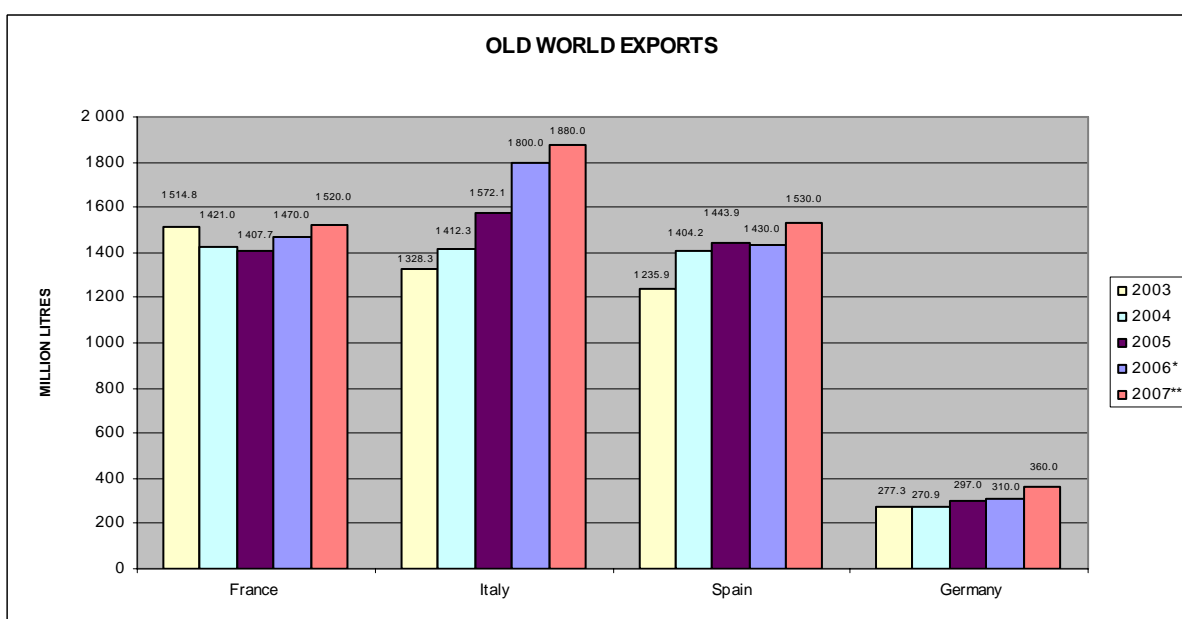
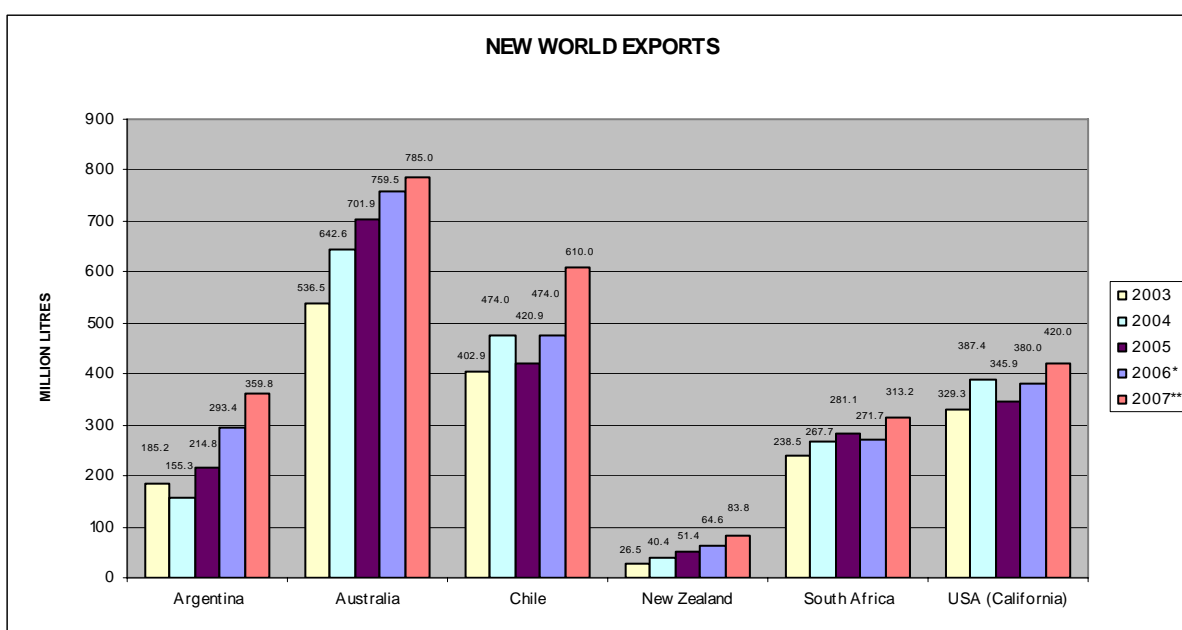
EXPORTS

Global wine exports

The world market, considered as the sum of exports for all countries, reached 9 130 million litres (+8.4%) in 2007. Nevertheless, a part of this trade growth would seem to come from re-exports, particularly within the context of trans-continental trade. Subject to these re-exports, international trade represents a relative value of nearly 38% of world consumption (compared to barely 18% in the early 1980s and 35% in 2006).

Since the recovery of a normal wine production level in 2004, Italy has once again regained its position of world leader in wine exports since the 2005/2006 harvests. In 2007, with nearly 1 880 million litres of wine exported (+80 million litres), Italy represents 21% of world trade ahead of Spain and France (1 520 million litres exported in 2007: 17% of world volumes traded).

The Southern hemisphere countries in addition to the USA have overall grown as a world market. South America increased its world market share in volume by 2% between 2006 and 2007 and reached 960 million litres (Chile: +140 and Argentina: +60 million litres). The group of six new exporter countries (Southern hemisphere and the USA) reached 28% of trade in 2007.



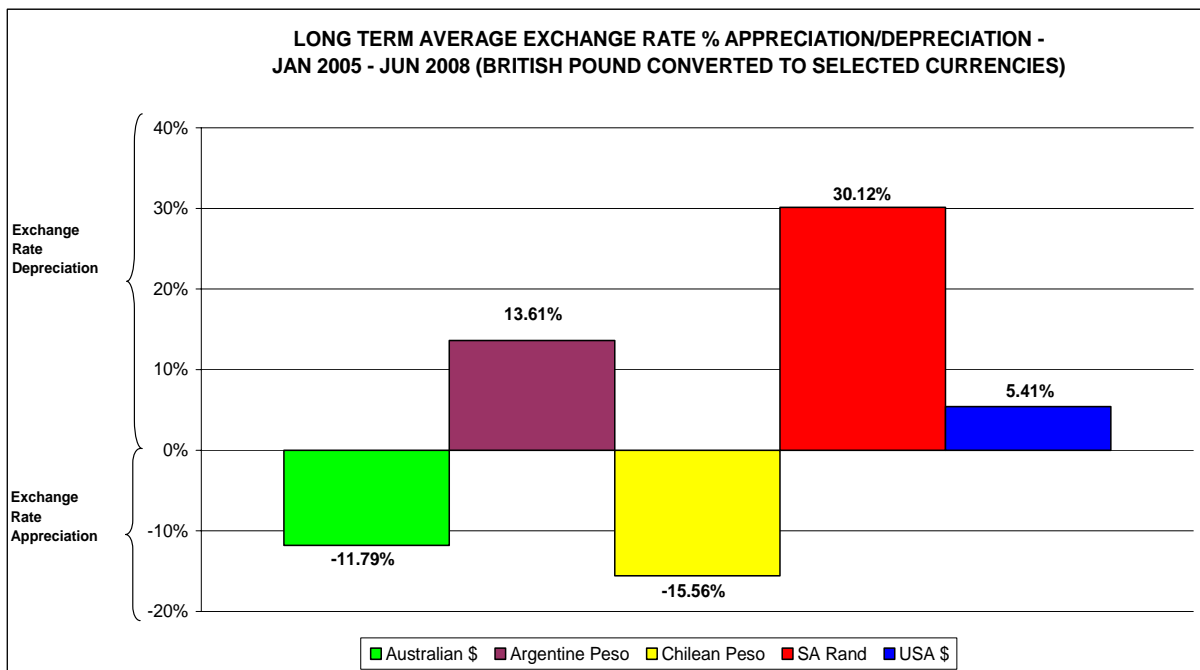
*Provisional
**Forecast
Source: OIV

EXCHANGE RATES - SELECTED COUNTRIES

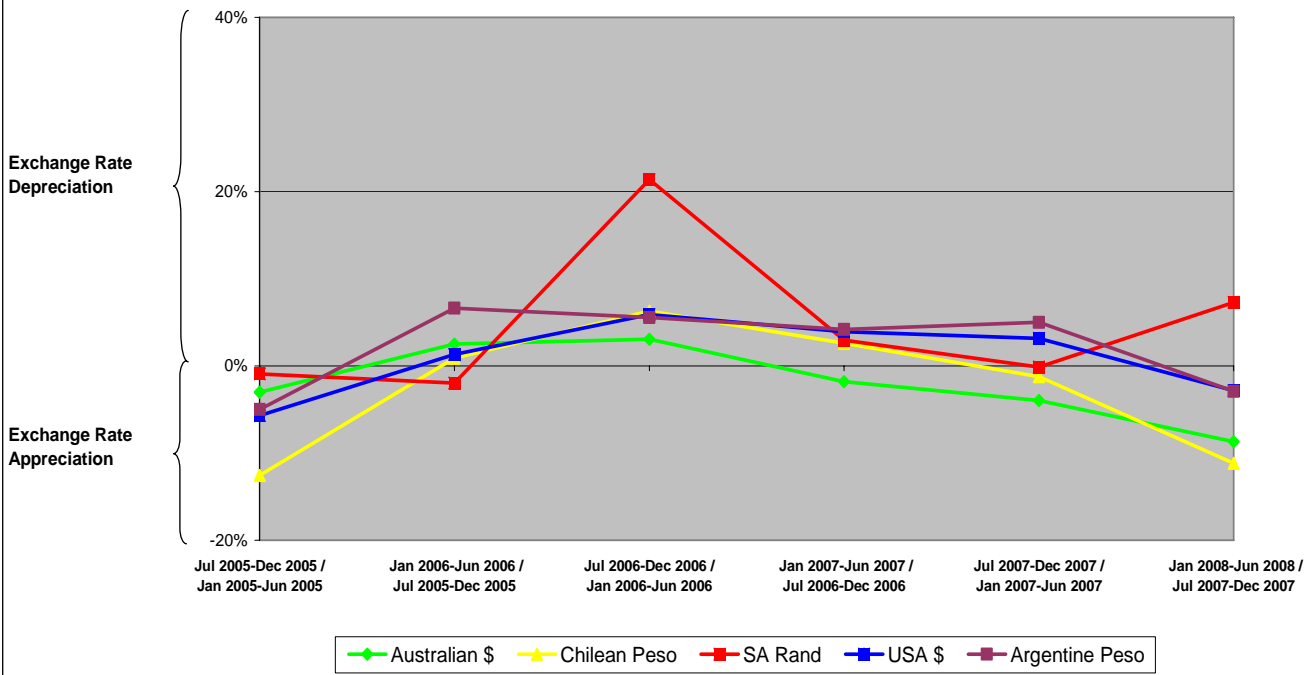
COMPARATIVE EXCHANGE RATES OF SELECTED COUNTRIES (Average rate during period)										
	Australian \$	Ave % movement	Argentine Peso	Ave % movement	Chilean Peso	Ave % movement	SA Rand	Ave % movement	USA \$	Ave % movement
Jan 2005-Jun 2005										
1 USA\$	1.29407		2.91935		583.03552		6.22545		1.00000	
1 Pound	2.42450		5.47121		1092.58945		11.65627		1.87392	
1 Euro	1.66321		3.75379		749.53551		7.99039		1.28556	
Jul 2005-Dec 2005		Jul 2005-Dec 2005/ Jan 2005-Jun 2005		Jul 2005-Dec 2005/ Jan 2005-Jun 2005		Jul 2005-Dec 2005/ Jan 2005-Jun 2005		Jul 2005-Dec 2005/ Jan 2005-Jun 2005		Jul 2005-Dec 2005/ Jan 2005-Jun 2005
1 USA\$	1.33087	2.84%	2.94240	0.79%	540.6653	-7.27%	6.53764	5.01%	1.00000	0.00%
1 Pound	2.35131	-3.02%	5.19900	-4.98%	955.50622	-12.55%	11.55089	-0.90%	1.76715	-5.70%
1 Euro	1.60312	-3.61%	3.54448	-5.58%	651.55525	-13.07%	7.8679	-1.53%	1.20486	-6.28%
Jan 2006-Jun 2006		Jan 2006-Jun 2006/ Jul 2005-Dec 2005		Jan 2006-Jun 2006/ Jul 2005-Dec 2005		Jan 2006-Jun 2006/ Jul 2005-Dec 2005		Jan 2006-Jun 2006/ Jul 2005-Dec 2005		Jan 2006-Jun 2006/ Jul 2005-Dec 2005
1 USA\$	1.34658	1.18%	3.09685	5.25%	538.31955	-0.43%	6.31977	-3.33%	1.00000	0.00%
1 Pound	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/ Jan 2006-Jun 2006		Jul 2006-Dec 2006/ Jan 2006-Jun 2006		Jul 2006-Dec 2006/ Jan 2006-Jun 2006		Jul 2006-Dec 2006/ Jan 2006-Jun 2006		Jul 2006-Dec 2006/ Jan 2006-Jun 2006
1 USA\$	1.31021	-2.70%	3.08606	-0.35%	540.65940	0.43%	7.25111	14.74%	1.00000	0.00%
1 Pound	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/ Jul 2006-Dec 2006		Jan 2007-Jun 2007/ Jul 2006-Dec 2006		Jan 2007-Jun 2007/ Jul 2006-Dec 2006		Jan 2007-Jun 2007/ Jul 2006-Dec 2006		Jan 2007-Jun 2007/ Jul 2006-Dec 2006
1 USA\$	1.23810	-5.50%	3.09427	0.27%	533.78055	-1.27%	7.18397	-0.93%	1.00000	0.00%
1 Pound	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/ Jan 2007-Jun 2007		Jul 2007-Dec 2007/ Jan 2007-Jun 2007		Jul 2007-Dec 2007/ Jan 2007-Jun 2007		Jul 2007-Dec 2007/ Jan 2007-Jun 2007		Jul 2007-Dec 2007/ Jan 2007-Jun 2007
1 USA\$	1.15278	-6.89%	3.14962	1.79%	510.97638	-4.27%	6.95566	-3.18%	1.00000	0.00%
1 Pound	2.34234	-3.95%	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/ Jul 2007-Dec 2007		Jan 2008-Jun 2008/ Jul 2007-Dec 2007		Jan 2008-Jun 2008/ Jul 2007-Dec 2007		Jan 2008-Jun 2008/ Jul 2007-Dec 2007		Jan 2008-Jun 2008/ Jul 2007-Dec 2007
1 USA\$	1.08281	-6.07%	3.14690	-0.09%	467.19744	-8.57%	7.67753	10.38%	1.00000	0.00%
1 Pound	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%
Jan 2005-Jun 2008		Jan 2008-Jun 2008/ Jan 2005-Jun 2005		Jan 2008-Jun 2008/ Jan 2005-Jun 2005		Jan 2008-Jun 2008/ Jan 2005-Jun 2005		Jan 2008-Jun 2008/ Jan 2005-Jun 2005		Jan 2008-Jun 2008/ Jan 2005-Jun 2005
1 USA\$	1.25072	-16.33%	3.06222	7.79%	530.58583	-19.87%	6.87981	23.32%	1.00000	0.00%
1 Pound	2.36988	-11.79%	5.82594	13.61%	1007.01260	-15.56%	13.10694	30.12%	1.90091	5.41%
1 Euro	1.64726	-0.38%	4.06352	28.35%	700.28779	-4.59%	9.14545	47.04%	1.32513	19.10%

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.

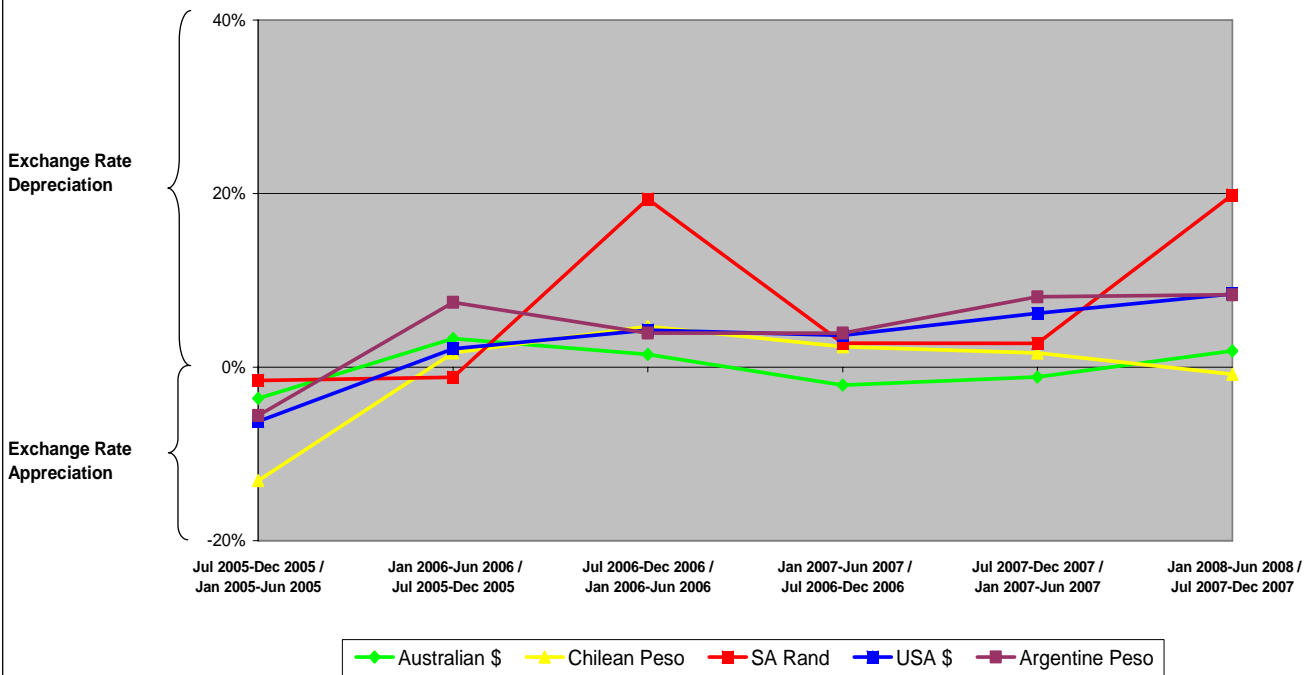
SOURCE: www.oanda.com



**BRITISH POUND CONVERTED TO CURRENCIES OF SELECTED COUNTRIES
(6 MONTHS AVERAGE % APPRECIATION/DEPRECIATION)**



**EURO CONVERTED TO CURRENCIES OF SELECTED COUNTRIES
(6 MONTHS AVERAGE % APPRECIATION/DEPRECIATION)**

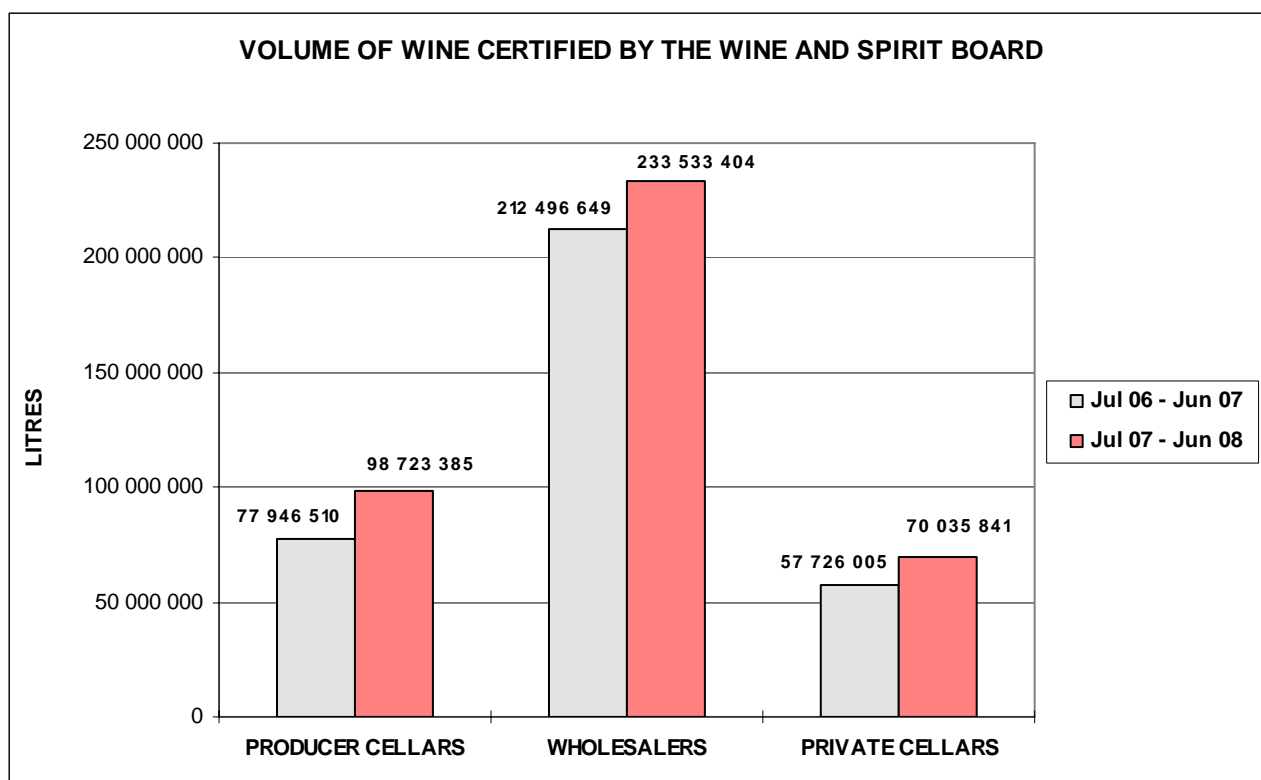


VOLUME OF WINE CERTIFIED (LITRES)

	1 MONTH			3 MONTHS			6 MONTHS			12 MONTHS		
	Jun-07	Jun-08	Trend	Apr-07 Jun-07	Apr-08 Jun-08	Trend	Jan-07 Jun-07	Jan-08 Jun-08	Trend	Jul-06 Jun-07	Jul-07 Jun-08	Trend
PRODUCER CELLARS												
Estate Wine	0	0		0	0		0	0		0	0	
Wine of Origin	5 421 703	4 834 706	89	14 731 898	13 890 936	94	23 890 740	30 222 044	127	46 517 825	65 479 147	141
Geographical Unit Wine	3 234 765	2 576 242	80	9 083 178	8 133 884	90	14 698 935	14 348 627	98	31 428 685	33 244 238	106
SUB TOTAL	8 656 468	7 410 948	86	23 815 076	22 024 820	92	38 589 675	44 570 671	115	77 946 510	98 723 385	127
WHOLESALERS												
Estate Wine	0	0		0	0		0	0		0	0	
Wine of Origin	3 360 417	4 597 681	137	7 880 176	12 819 892	163	14 756 638	22 324 951	151	30 619 356	38 826 825	127
Geographical Unit Wine	19 219 207	18 878 287	98	52 392 691	58 481 508	112	95 454 954	100 527 718	105	181 877 293	194 706 579	107
SUB TOTAL	22 579 624	23 475 968	104	60 272 867	71 301 400	118	110 211 592	122 852 669	111	212 496 649	233 533 404	110
PRIVATE CELLARS												
Estate Wine	717 931	876 432	122	1 970 769	2 201 779	112	3 574 707	3 795 761	106	7 657 142	7 916 700	103
Wine of Origin	2 693 663	3 046 317	113	8 364 371	9 514 165	114	15 584 710	17 237 122	111	33 811 363	37 466 827	111
Geographical Unit Wine	1 654 825	2 503 162	151	4 738 957	8 281 163	175	8 147 910	13 831 522	170	16 257 500	24 652 314	152
SUB TOTAL	5 066 419	6 425 911	127	15 074 097	19 997 107	133	27 307 327	34 864 405	128	57 726 005	70 035 841	121
TOTAL	36 302 511	37 312 827	103	99 162 040	113 323 327	114	176 108 594	202 287 745	115	348 169 164	402 292 630	116

CERTIFIED BULK EXPORTS (included in above figures)	1 MONTH			3 MONTHS			6 MONTHS			12 MONTHS		
	Jun-07	Jun-08	Trend	Apr-07 Jun-07	Apr-08 Jun-08	Trend	Jan-07 Jun-07	Jan-08 Jun-08	Trend	Jul-06 Jun-07	Jul-07 Jun-08	Trend
	12 526 113	12 997 515	104	35 168 278	40 600 041	115	60 017 404	76 115 818	127	112 594 660	147 932 059	131

*The total volume of wine certified in the 2007 calendar year made up 51.5% of the 2007 wine production (46.6%-2006,52.9%-2005,44.1%-2004,38.5%-2003)



INDUSTRY INFORMATION COMMITTEE MEMBERS

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