

# Wine Industry

I N F O R M A T I O N

## November 2008



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### THE STOCK OF RED WINE AS WELL AS WHITE WINE DECREASE FROM 2007 TO 2008

In this month's issue we take a look at the stock situation in the wine industry determined during October 2008 at producer cellars. On page 11 we provide an overview of the stock situation which shows that in comparison with the corresponding period in 2007, total natural wine decreased by 17.0%.

In 2008 red wine makes up 38.8% of the total stock and white wine 61.2% against 2007 where red wine made up 43.9% and white wine 56.1%. The volume of red wine stock decreased from 163,7 million litres in 2007 to 120.2 million litres in 2008. Cabernet Sauvignon, Merlot, Shiraz and Other red all showed negative growth from 2007 to 2008 of 21.0%, 34.0%, 17.0% and 29.0% respectively. Pinotage increased by 9.5% from 2006 to 2007, but decreased in 2008 by 31.0%. White varieties showing negative growth during the same period are Chardonnay, Chenin blanc and Colombar, decreasing by 25%, 6% and 29% respectively, while Sauvignon blanc and Other white increased by 9% and 1.7% respectively. Total white wine stock decreased by 9.0% (19,2 million litres) from 2007 to 2008.

In comparison with the corresponding period in 2007 the total stock situation in the Little Karoo, Robertson and Worcester region showed a decrease of 18.0%, the Olifants River and Orange River a decrease of 19.0% and the Stellenbosch, Paarl and Malmesbury region a decrease of 13.0%. The tables on page 13 provides a summary of the stock situation in the various regions, while tables 5 to 7 (page 14) summarizes every region separately.

Also in this issue – domestic sales of natural wine during September 2008 (page 2), price ranges in which wine were sold in bulk during January to September 2008 (pages 3 to 7), the average prices of wine sold in bulk (page 8) exports of wine and flavoured grape liquor during October 2008 (page 9), exports per country (page 10) and volume of wine certified during October 2008 (page 20).

SAWIS greetings until December  
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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  |          |
|---------------------------------|-------------------|-------------------|-------------------|-------------------|--------------------|--------------------|--------------------|--------------------|---------------|----------|-----------|----------|----------|----------|---------------|----------|
|                                 | SEP 2007          | SEP 2008          | JUL 2007          | JUL 2008          | SEP 2007           | SEP 2008           | APR 2007           | APR 2008           | SEP 2007      | SEP 2008 | OCT 2006  | OCT 2007 | SEP 2007 | SEP 2008 | OCT 2007      | SEP 2008 |
|                                 |                   | TREND             |                   | TREND             |                    | TREND              |                    | TREND              |               | TREND    |           | TREND    |          | TREND    |               | TREND    |
| Wholesalers                     | 13 356 341        | 13 905 918        | 41 387 223        | 42 351 466        | 81 856 525         | 81 263 774         | 169 463 493        | 168 248 171        | 99.28         |          |           |          |          |          | 53.88         |          |
| Private Cellars                 | 3 480 152         | 3 364 009         | 9 132 740         | 10 219 387        | 18 238 371         | 19 770 123         | 36 002 497         | 40 383 055         | 112.17        |          |           |          |          |          | 12.93         |          |
| Producer Cellars                | 7 886 369         | 8 358 825         | 31 288 309        | 25 847 007        | 54 565 912         | 51 623 430         | 105 231 758        | 103 652 325        | 98.50         |          |           |          |          |          | 33.19         |          |
| <b>SUB TOTAL</b>                | <b>24 722 862</b> | <b>25 628 752</b> | <b>81 808 272</b> | <b>78 417 860</b> | <b>154 660 808</b> | <b>152 657 327</b> | <b>310 697 748</b> | <b>312 283 551</b> | <b>100.51</b> |          |           |          |          |          | <b>100.00</b> |          |
| Wine component of alc fruit bev | 0                 | 0                 | 0                 | 0                 | 0                  | 0                  | 979 593            | 0                  | 0.00          |          |           |          |          |          | 0.00          |          |
| <b>TOTAL</b>                    | <b>24 722 862</b> | <b>25 628 752</b> | <b>81 808 272</b> | <b>78 417 860</b> | <b>154 660 808</b> | <b>152 657 327</b> | <b>311 677 341</b> | <b>312 283 551</b> | <b>100.19</b> |          |           |          |          |          | <b>100.00</b> |          |

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  |          |
|--------------|-------------------|-------------------|-------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------|----------|-----------|----------|----------|----------|---------------|----------|
|              | SEP 2007          | SEP 2008          | JUL 2007          | JUL 2008           | SEP 2007           | SEP 2008           | APR 2007           | APR 2008           | SEP 2007      | SEP 2008 | OCT 2006  | OCT 2007 | SEP 2007 | SEP 2008 | OCT 2007      | SEP 2008 |
|              |                   | TREND             |                   | TREND              |                    | TREND              |                    | TREND              |               | TREND    |           | TREND    |          | TREND    |               | TREND    |
| <b>TOTAL</b> | <b>27 914 740</b> | <b>46 832 808</b> | <b>77 506 445</b> | <b>118 906 367</b> | <b>155 570 322</b> | <b>221 960 028</b> | <b>286 759 163</b> | <b>394 580 492</b> | <b>137.60</b> |          |           |          |          |          | <b>100.00</b> |          |

## DOMESTIC SALES AND EXPORT OF NATURAL WINE GROSS LITRE

|              | 1 MONTH           |                   | 3 MONTHS           |                    |                    |                    | 6 MONTHS           |                    |               |          | 12 MONTHS |          |          |          | MARKET SHARE  |          |
|--------------|-------------------|-------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------|----------|-----------|----------|----------|----------|---------------|----------|
|              | SEP 2007          | SEP 2008          | JUL 2007           | JUL 2008           | SEP 2007           | SEP 2008           | APR 2007           | APR 2008           | SEP 2007      | SEP 2008 | OCT 2006  | OCT 2007 | SEP 2007 | SEP 2008 | OCT 2007      | SEP 2008 |
|              |                   | TREND             |                    | TREND              |                    | TREND              |                    | TREND              |               | TREND    |           | TREND    |          | TREND    |               | TREND    |
| <b>TOTAL</b> | <b>52 637 602</b> | <b>72 461 560</b> | <b>159 314 717</b> | <b>197 324 227</b> | <b>310 231 130</b> | <b>374 617 355</b> | <b>598 436 504</b> | <b>706 864 043</b> | <b>118.12</b> |          |           |          |          |          | <b>100.00</b> |          |

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

# PRICE RANGES IN WHICH WINE WERE SOLD IN BULK FOR THE PERIOD JANUARY - SEPTEMBER 2008

| TYPE                  | PRICE RANGE<br>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          |
| Cabernet<br>Sauvignon | < 100                          |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 100 - < 150                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.1           |
|                       | 150 - < 200                    |                  |               | 22 500         | 1.6           |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.4           |
|                       | 200 - < 250                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.1           |
|                       | 250 - < 300                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.4           |
|                       | 300 - < 350                    |                  |               | 1 059 441      | 77.2          | 17 760        | 1.9           |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.1           |
|                       | 350 - < 400                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.1           |
|                       | 400 - < 450                    |                  |               | 213 990        | 15.6          | 176 580       | 18.7          | 40 740        | 85.1           |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.1           |
|                       | 450 - < 500                    |                  |               | 75 970         | 5.5           | 112 270       | 11.9          | 4 580         | 9.6            |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.1           |
|                       | 500 - < 550                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.1           |
|                       | 550 - < 600                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.1           |
| 600 - < 650           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.1          |               |
| 650 - < 700           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.1          |               |
| 700 - < 750           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.1          |               |
| 750 - < 800           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.1          |               |
| 800 - < 850           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.1          |               |
| 850 - < 900           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.1          |               |
| 900 - < 950           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.1          |               |
| 950 - < 1000          |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.1          |               |
| > 1000                |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.1          |               |
| <b>TOTAL</b>          | <b>£</b>                       | <b>1 371 901</b> | <b>100.0</b>  | <b>946 340</b> | <b>100.0</b>  | <b>47 900</b> | <b>100.0</b>  | <b>320.33</b> | <b>47 900</b>  | <b>100.0</b> | <b>3 380 887</b> | <b>100.0</b> | <b>3 294 921</b> | <b>100.0</b> | <b>2 410 221</b> | <b>100.0</b> | <b>5 984 084</b> | <b>100.0</b>  | <b>17 436 254</b> | <b>100.0</b> | <b>100.0</b>  |
| <b>AVE PRICE</b>      |                                |                  | <b>335.49</b> |                | <b>545.11</b> |               | <b>320.33</b> |               | <b>47 900</b>  |              | <b>455.26</b>    |              | <b>493.84</b>    |              | <b>463.04</b>    |              | <b>396.58</b>    |               | <b>17 436 254</b> |              | <b>495.27</b> |
| Cabernet<br>Franc     | 100 - < 150                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 150 - < 200                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 200 - < 250                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 250 - < 300                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 300 - < 350                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 350 - < 400                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 400 - < 450                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 450 - < 500                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 500 - < 550                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 550 - < 600                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 600 - < 650                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
| 650 - < 700           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 700 - < 750           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 750 - < 800           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 800 - < 850           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 850 - < 900           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 900 - < 950           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 950 - < 1000          |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| <b>TOTAL</b>          | <b>£</b>                       | <b>1 371 901</b> | <b>100.0</b>  | <b>946 340</b> | <b>100.0</b>  | <b>47 900</b> | <b>100.0</b>  | <b>320.33</b> | <b>47 900</b>  | <b>100.0</b> | <b>3 380 887</b> | <b>100.0</b> | <b>3 294 921</b> | <b>100.0</b> | <b>2 410 221</b> | <b>100.0</b> | <b>5 984 084</b> | <b>100.0</b>  | <b>17 436 254</b> | <b>100.0</b> | <b>100.0</b>  |
| <b>AVE PRICE</b>      |                                |                  | <b>335.49</b> |                | <b>545.11</b> |               | <b>320.33</b> |               | <b>47 900</b>  |              | <b>455.26</b>    |              | <b>493.84</b>    |              | <b>463.04</b>    |              | <b>396.58</b>    |               | <b>17 436 254</b> |              | <b>495.27</b> |
| Ruby<br>Cabernet      | 100 - < 150                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 150 - < 200                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 200 - < 250                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 250 - < 300                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 300 - < 350                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 350 - < 400                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 400 - < 450                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 450 - < 500                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 500 - < 550                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 550 - < 600                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 600 - < 650                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
| 650 - < 700           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 700 - < 750           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 750 - < 800           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 800 - < 850           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 850 - < 900           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 900 - < 950           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 950 - < 1000          |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| <b>TOTAL</b>          | <b>£</b>                       | <b>244 100</b>   | <b>100.0</b>  | <b>284 466</b> | <b>100.0</b>  | <b>97 900</b> | <b>100.0</b>  | <b>303.54</b> | <b>225 970</b> | <b>100.0</b> | <b>411 313</b>   | <b>100.0</b> | <b>1 768 491</b> | <b>100.0</b> | <b>91 100</b>    | <b>100.0</b> | <b>2 705 291</b> | <b>100.0</b>  | <b>5 828 631</b>  | <b>100.0</b> | <b>100.0</b>  |
| <b>AVE PRICE</b>      |                                |                  | <b>272.18</b> |                | <b>346.17</b> |               | <b>303.54</b> |               | <b>225 970</b> |              | <b>411 313</b>   |              | <b>1 768 491</b> |              | <b>91 100</b>    |              | <b>2 705 291</b> |               | <b>5 828 631</b>  |              | <b>408.12</b> |
| Juice                 | 100 - < 150                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 150 - < 200                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 200 - < 250                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 250 - < 300                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 300 - < 350                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 350 - < 400                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 400 - < 450                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 450 - < 500                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 500 - < 550                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 550 - < 600                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
|                       | 600 - < 650                    |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   |              | 0.0           |
| 650 - < 700           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 700 - < 750           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 750 - < 800           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 800 - < 850           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 850 - < 900           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 900 - < 950           |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| 950 - < 1000          |                                |                  |               |                |               |               |               |               |                |              |                  |              |                  |              |                  |              |                  |               |                   | 0.0          |               |
| <b>TOTAL</b>          | <b>£</b>                       | <b>244 100</b>   | <b>100.0</b>  | <b>284 466</b> | <b>100.0</b>  | <b>97 900</b> | <b>100.0</b>  | <b>303.54</b> | <b>225 970</b> | <b>100.0</b> | <b>411 313</b>   | <b>100.0</b> | <b>1 768 491</b> | <b>100.0</b> | <b>91 100</b>    | <b>100.0</b> | <b>2 705 291</b> | <b>100.0</b>  | <b>5 828 631</b>  | <b>100.0</b> | <b>100.0</b>  |
| <b>AVE PRICE</b>      |                                |                  | <b>272.18</b> |                | <b>346.17</b> |               | <b>303.54</b> |               | <b>225 970</b> |              | <b>411 313</b>   |              | <b>1 768 491</b> |              |                  |              |                  |               |                   |              |               |

| TYPE                 | PRICE RANGE<br>R/H/L OF C/I | ORANGE RIVER  |              | OULFANTS RIVER   |              | MALMESBURY       |              | LITTLE KAROO   |              | PAARL            |               | ROBERTSON        |              | STELLENBOSCH     |              | WORCESTER        |              | INDUSTRY 2008     |              | INDUSTRY %    |               |
|----------------------|-----------------------------|---------------|--------------|------------------|--------------|------------------|--------------|----------------|--------------|------------------|---------------|------------------|--------------|------------------|--------------|------------------|--------------|-------------------|--------------|---------------|---------------|
|                      |                             | LITRES        | %            | LITRES           | %            | LITRES           | %            | LITRES         | %            | LITRES           | %             | LITRES           | %            | LITRES           | %            | LITRES           | %            | LITRES            | %            | 2007          | 2006          |
| Merlot               | 100 - < 150                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 150 - < 200                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 200 - < 250                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 250 - < 300                 | 27 500        | 100.0        |                  |              | 58150            | 9.6          | 124 960        | 41.1         | 38 345           | 2.0           | 121 650          | 10.2         | 78 380           | 4.7          | 56 920           | 1.2          | 40 445            | 0.4          |               |               |
|                      | 300 - < 350                 |               |              | 661 391          | 80.3         | 14 735           | 2.4          | 96 695         | 31.8         | 24 500           | 1.3           | 463 595          | 38.7         | 237 077          | 14.2         | 873 742          | 19.2         | 101 780           | 2.2          | 264 530       | 2.4           |
|                      | 350 - < 400                 |               |              |                  |              | 238 080          | 39.5         | 74 400         | 24.5         | 255 027          | 13.5          | 28 620           | 2.4          | 384 197          | 23.0         | 1 007 335        | 22.1         | 2 886 234         | 26.1         | 31.3          | 33.7          |
|                      | 400 - < 450                 |               |              |                  |              | 139 080          | 23.1         |                |              | 71 555           | 3.8           | 131 190          | 11.0         | 270 760          | 16.2         | 585 950          | 12.4         | 1 326 705         | 12.0         | 14.5          | 11.9          |
|                      | 450 - < 500                 |               |              | 148 170          | 18.0         | 128 550          | 21.3         | 5 185          | 1.7          | 482 138          | 25.6          | 9 800            | 0.8          | 118 459          | 7.1          | 444 420          | 9.8          | 1 203 152         | 10.9         | 5.8           | 8.7           |
|                      | 500 - < 550                 |               |              | 14 600           | 1.8          | 5 920            | 1.0          | 2 580          | 0.8          | 361 470          | 19.2          | 356 386          | 29.8         | 184 680          | 11.0         | 1 353 516        | 29.7         | 2 264 552         | 20.5         | 14.9          | 6.6           |
|                      | 550 - < 600                 |               |              |                  |              | 18 777           | 3.1          |                |              | 45 020           | 2.4           | 85 190           | 7.1          | 269 305          | 16.1         | 90 380           | 2.0          | 154 177           | 1.4          | 5.5           | 7.0           |
|                      | 600 - < 650                 |               |              |                  |              |                  |              |                |              | 8 700            | 0.5           |                  |              | 31 320           | 1.9          | 25 000           | 0.5          | 388 195           | 3.5          | 2.9           | 5.3           |
|                      | 650 - < 700                 |               |              |                  |              |                  |              |                |              | 5 300            | 0.3           |                  |              | 75 000           | 4.5          | 27 780           | 0.6          | 36 620            | 0.3          | 4.0           | 4.0           |
|                      | 700 - < 750                 |               |              |                  |              |                  |              |                |              | 2 310            | 0.1           |                  |              | 20 700           | 1.2          | 9 840            | 0.2          | 105 090           | 0.9          | 0.7           | 4.1           |
| 750 - < 800          |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  | 30 640       | 0.3               | 0.3          | 0.0           |               |
| 800 - < 850          |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   | 0.4          | 0.4           | 1.9           |
| 850 - < 900          |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   | 0.9          | 0.0           | 0.9           |
| 900 - < 950          |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   | 0.1          | 0.1           | 1.2           |
| 950 - < 1000         |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   | 0.1          | 0.1           | 0.0           |
| > 1000               |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   | 0.1          | 0.1           | 0.0           |
| <b>TOTAL</b>         |                             | <b>27 500</b> | <b>100.0</b> | <b>824 161</b>   | <b>100.0</b> | <b>603 272</b>   | <b>100.0</b> | <b>303 820</b> | <b>100.0</b> | <b>1 883 685</b> | <b>415.22</b> | <b>1 196 431</b> | <b>100.0</b> | <b>1 671 978</b> | <b>100.0</b> | <b>4 556 763</b> | <b>100.0</b> | <b>11 067 610</b> | <b>100.0</b> | <b>396.68</b> | <b>426.29</b> |
| <b>AVERAGE PRICE</b> |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
| Shiraz               | 100 - < 150                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 150 - < 200                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 200 - < 250                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 250 - < 300                 | 20 000        | 100.0        |                  |              |                  |              | 92 960         | 31.9         | 14 120           | 0.5           |                  |              | 10 070           | 0.6          |                  |              | 10 070            | 0.1          | 0.1           | 0.1           |
|                      | 300 - < 350                 |               |              |                  |              |                  |              | 120 720        | 41.4         | 114 920          | 3.7           |                  |              | 14 120           | 0.1          |                  |              | 14 120            | 0.1          | 0.7           | 0.2           |
|                      | 350 - < 400                 |               |              |                  |              |                  |              | 75 450         | 25.9         | 164 610          | 5.3           |                  |              | 49 400           | 3.0          |                  |              | 114 920           | 0.6          | 1.0           | 0.3           |
|                      | 400 - < 450                 |               |              |                  |              |                  |              |                |              | 350 336          | 11.3          |                  |              | 135 150          | 8.3          |                  |              | 665 415           | 3.6          | 9.6           | 5.3           |
|                      | 450 - < 500                 |               |              | 967 663          | 46.3         | 155 000          | 6.6          |                |              | 866 720          | 32.0          |                  |              | 1 412 174        | 23.9         |                  |              | 4 107 763         | 22.3         | 17.0          | 14.4          |
|                      | 500 - < 550                 |               |              | 866 734          | 41.4         | 194 140          | 8.3          |                |              | 200 350          | 6.6           |                  |              | 1 438 201        | 24.3         |                  |              | 3 485 233         | 18.9         | 17.1          | 15.6          |
|                      | 550 - < 600                 |               |              | 34 530           | 1.7          | 17 640           | 0.8          |                |              | 885 862          | 29.3          |                  |              | 185 100          | 11.4         |                  |              | 740 726           | 12.5         | 11.9          | 10.4          |
|                      | 600 - < 650                 |               |              | 222 860          | 10.7         |                  |              |                |              | 813 880          | 26.2          |                  |              | 17 470           | 1.1          |                  |              | 387 558           | 6.5          | 10.4          | 7.2           |
|                      | 650 - < 700                 |               |              |                  |              |                  |              |                |              | 163 696          | 5.3           |                  |              | 403 586          | 24.9         |                  |              | 2 290 274         | 12.4         | 15.5          | 7.8           |
|                      | 700 - < 750                 |               |              |                  |              |                  |              |                |              | 220 750          | 7.1           |                  |              | 113 370          | 7.0          |                  |              | 907 897           | 4.9          | 4.3           | 7.6           |
| 750 - < 800          |                             |               |              |                  |              |                  |              |                | 234 930      | 7.6              |               |                  | 130 272      | 8.0              |              |                  | 647 311      | 3.5               | 3.6          | 7.5           |               |
| 800 - < 850          |                             |               |              |                  |              |                  |              |                | 82 680       | 2.7              |               |                  | 57 380       | 3.5              |              |                  | 1 666 463    | 9.1               | 8.6          | 5.5           |               |
| 850 - < 900          |                             |               |              |                  |              |                  |              |                | 73 120       | 2.4              |               |                  | 297 015      | 18.3             |              |                  | 417 755      | 2.3               | 0.4          | 4.1           |               |
| 900 - < 950          |                             |               |              |                  |              |                  |              |                | 15 057       | 0.5              |               |                  | 29 990       | 1.9              |              |                  | 45 047       | 0.2               | 0.0          | 2.1           |               |
| 950 - < 1000         |                             |               |              |                  |              |                  |              |                |              |                  |               |                  | 11 690       | 0.7              |              |                  | 19 240       | 0.3               | 3.1          | 7.5           |               |
| > 1000               |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              | 11 690            | 0.1          | 0.1           | 0.3           |
| <b>TOTAL</b>         |                             | <b>20 000</b> | <b>100.0</b> | <b>2 091 787</b> | <b>100.0</b> | <b>2 337 232</b> | <b>100.0</b> | <b>291 710</b> | <b>100.0</b> | <b>3 103 253</b> | <b>100.0</b>  | <b>3 020 164</b> | <b>100.0</b> | <b>1 620 623</b> | <b>100.0</b> | <b>5 918 806</b> | <b>100.0</b> | <b>18 403 575</b> | <b>100.0</b> | <b>458.12</b> | <b>514.37</b> |
| <b>AVERAGE PRICE</b> |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
| Pinotage             | 100 - < 150                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 150 - < 200                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 200 - < 250                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 250 - < 300                 | 50 400        | 100.0        |                  |              |                  |              | 80 735         | 73.7         | 5 965            | 0.2           |                  |              | 366 700          | 15.9         |                  |              | 5 965             | 0.1          | 0.0           | 0.0           |
|                      | 300 - < 350                 |               |              |                  |              |                  |              | 26 258         | 24.0         |                  |               |                  |              | 122 870          | 24.2         |                  |              | 290 830           | 7.3          | 4.8           | 1.6           |
|                      | 350 - < 400                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              | 151 615          | 29.8         |                  |              | 1 193 307         | 30.1         | 35.3          | 41.3          |
|                      | 400 - < 450                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              | 107 749          | 21.2         |                  |              | 1 123 350         | 28.3         | 13.0          | 8.5           |
|                      | 450 - < 500                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              | 474 361          | 20.6         |                  |              | 2 162 519         | 18.9         | 17.3          | 27.4          |
|                      | 500 - < 550                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              | 23 720           | 4.7          |                  |              | 2 083 816         | 18.2         | 10.3          | 8.3           |
|                      | 550 - < 600                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              | 2 700            | 0.5          |                  |              | 1 532 058         | 13.4         | 6.2           | 5.4           |
|                      | 600 - < 650                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              | 13 400           | 0.6          |                  |              | 862 036           | 7.5          | 6.2           | 2.1           |
|                      | 650 - < 700                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              | 326 680          | 14.2         |                  |              | 206 840           | 1.8          | 2.2           | 1.0           |
|                      | 700 - < 750                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              | 59 080           | 1.5          |                  |              | 407 240           | 3.6          | 0.9           | 0.4           |
| 750 - < 800          |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  | 2 810        | 0.0               | 0.0          | 0.1           |               |
| 800 - < 850          |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  | 57 360       | 0.5               | 0.0          | 0.0           |               |
| > 1000               |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
| <b>TOTAL</b>         |                             | <b>50 400</b> | <b>100.0</b> | <b>955 153</b>   | <b>100.0</b> | <b>753 211</b>   | <b>100.0</b> | <b>109 593</b> | <b>100.0</b> | <b>2 806 127</b> | <b>100.0</b>  | <b>508 014</b>   | <b>100.0</b> | <b>2 307 146</b> | <b>100.0</b> | <b>3 963 789</b> | <b>100.0</b> | <b>11 453 433</b> | <b>100.0</b> | <b>396.68</b> | <b>392.88</b> |
| <b>AVERAGE PRICE</b> |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
| Pinot Noir           | 300 - < 350                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 350 - < 400                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 400 - < 450                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 500 - < 550                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 650 - < 700                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
|                      | 700 - < 750                 |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
| <b>TOTAL</b>         |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
| <b>AVERAGE PRICE</b> |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
| <b>TOTAL</b>         |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |
| <b>AVERAGE PRICE</b> |                             |               |              |                  |              |                  |              |                |              |                  |               |                  |              |                  |              |                  |              |                   |              |               |               |



| TYPE            | 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    | 1.6     | 118 467   | 2.6       | 11 125       | 1.2     | 173 690    | 2.3       | 198 240       | 1.3       | 0.2        | 0.0    |      |
|                 | 200 - < 250  |        |                |        |            |        |              |         |           |         |           |           |              |         |            |           |               |           | 0.8        | 0.4    |      |
|                 | 250 - < 300  |        |                |        |            |        |              |         | 20 260    | 1.3     | 159 570   | 3.5       |              |         | 219 050    | 2.9       | 348 642       | 2.3       | 3.1        | 1.7    |      |
|                 | 300 - < 350  |        |                |        |            |        |              |         |           |         | 35 170    | 0.8       |              |         | 289 466    | 3.6       | 449 296       | 3.0       | 3.8        | 1.3    |      |
|                 | 350 - < 400  |        |                |        |            |        |              |         |           |         | 85 700    | 1.9       |              |         | 209 113    | 2.8       | 244 283       | 1.6       | 3.0        | 1.3    |      |
|                 | 400 - < 450  |        |                |        |            |        |              | 21 850  | 33.3      |         |           |           |              |         | 48 600     | 0.7       | 156 150       | 1.0       | 2.1        | 3.5    |      |
|                 | 450 - < 500  |        |                |        |            |        |              |         | 186 318   | 12.3    | 514 350   | 11.2      |              |         | 1 344 891  | 18.1      | 2 261 625     | 15.1      | 6.4        | 13.7   |      |
|                 | 500 - < 550  |        |                |        |            |        |              | 43 733  | 66.7      | 206 480 | 13.6      | 1 513 150 | 33.0         |         |            | 3 005 921 | 40.5          | 5 445 886 | 36.4       | 50.9   | 32.5 |
|                 | 550 - < 600  |        |                |        |            |        |              |         |           | 677 387 | 44.6      | 746 780   | 16.3         |         |            | 1 559 977 | 21.0          | 3 045 264 | 20.3       | 10.4   | 29.9 |
|                 | 600 - < 650  |        |                |        |            |        |              |         | 313 974   | 20.7    | 1 321 077 | 28.8      |              |         | 426 544    | 5.7       | 2 061 595     | 13.8      | 12.4       | 7.5    |      |
|                 | 650 - < 700  |        |                |        |            |        |              |         |           |         | 43 760    | 1.0       |              |         | 95 040     | 1.3       | 138 800       | 0.9       | 1.6        | 1.3    |      |
| 700 - < 750     |              |        |                |        |            |        |              | 30 440  | 2.0       |         |           |           |              |         |            | 171 590   | 1.1           | 1.8       | 1.6        |        |      |
| 750 - < 800     |              |        |                |        |            |        |              | 30 420  | 2.0       |         |           | 154 031   | 16.8         | 5 700   | 0.1        | 190 151   | 1.3           | 1.9       | 1.9        |        |      |
| 800 - < 850     |              |        |                |        |            |        |              |         | 0.0       |         |           |           |              | 39 098  | 0.5        | 39 098    | 0.3           | 0.3       | 1.0        |        |      |
| 850 - < 900     |              |        |                |        |            |        |              | 30 280  | 2.0       |         |           |           |              |         |            | 30 280    | 0.2           | 0.2       | 0.6        |        |      |
| 900 - < 950     |              |        |                |        |            |        |              |         |           |         |           |           |              |         |            | 50 690    | 0.3           | 0.0       | 0.4        |        |      |
| 950 - < 1000    |              |        |                |        |            |        |              |         |           |         |           |           |              |         |            |           |               | 0.0       | 0.0        | 0.3    |      |
| > 1000          |              |        |                |        |            |        |              |         |           |         | 46 631    | 1.0       |              |         | 29 722     | 0.4       | 137 713       | 0.9       | 0.7        | 1.0    |      |
| TOTAL           |              |        | 345 506        | 100.0  | 111 980    | 100.0  | 65 583       | 100.0   | 1 520 109 | 100.0   | 4 584 655 | 100.0     | 914 658      | 100.0   | 7 426 812  | 100.0     | 14 969 303    | 100.0     | 100.0      | 100.0  |      |
| AVE PRICE       |              |        | 494.54         |        | 699.86     |        | 466.68       |         | 554.96    |         | 531.18    |           | 621.84       |         | 496.45     |           | 496.45        |           | 517.21     | 547.53 |      |
| AVE PRICE       |              |        | 61 426         | 475.00 |            | 30 963 | 500.00       |         | 121 574   | 475.00  | 945 351   | 488.28    |              | 172 722 | 500.00     | 1 199 122 | 483.87        |           | 2 531 158  | 500.98 |      |
| 150 - < 200     |              |        |                |        | 118 950    | 6.7    |              |         | 45 700    | 0.7     | 29 110    | 0.6       | 420 640      | 9.5     | 163 120    | 0.7       | 118 950       | 0.2       | 0.0        | 0.0    |      |
| 200 - < 250     | 94 200       | 3.6    |                |        | 339 213    | 19.2   |              |         | 49 400    | 0.8     | 1 883 634 | 39.8      | 1 462 300    | 33.1    | 8 565 415  | 35.8      | 18 406 805    | 37.6      | 1.8        | 1.2    |      |
| 250 - < 300     | 2 502 070    | 96.4   | 1 661 106      | 58.6   | 614 720    | 34.8   | 1 668 160    | 80.6    | 963 060   | 14.8    | 1 370 840 | 29.0      | 652 374      | 14.8    | 11 211 030 | 46.9      | 16 196 076    | 33.1      | 37.4       | 36.8   |      |
| 300 - < 350     |              |        | 1 084 842      | 37.3   | 502 280    | 28.5   | 401 650      | 19.4    | 754 661   | 11.6    | 1 409 376 | 29.8      | 1 237 110    | 28.0    | 3 268 363  | 13.7      | 6 983 842     | 14.3      | 33.7       | 40.0   |      |
| 350 - < 400     |              |        | 181 182        | 6.2    | 133 150    | 7.5    |              |         | 2 289 459 | 35.0    | 34 850    | 0.7       | 335 115      | 7.6     | 648 999    | 2.7       | 3 345 233     | 6.8       | 16.4       | 11.1   |      |
| 400 - < 450     |              |        |                |        | 56 810     | 3.2    |              |         | 796 561   | 12.3    |           |           | 150 850      | 3.4     | 66 580     | 0.3       | 1 013 991     | 2.1       | 6.1        | 9.5    |      |
| 450 - < 500     |              |        |                |        |            |        |              |         | 1 455 683 | 22.4    |           |           | 158 620      | 3.6     |            |           | 1 614 303     | 3.3       | 3.7        | 0.7    |      |
| 500 - < 550     |              |        |                |        |            |        |              |         | 2 940     | 0.0     |           |           |              |         |            |           | 2 940         | 0.0       | 0.5        | 0.4    |      |
| 550 - < 600     |              |        |                |        |            |        |              |         | 70 840    | 1.1     |           |           |              |         |            |           | 70 840        | 0.1       | 0.1        | 0.1    |      |
| 600 - < 650     |              |        |                |        |            |        |              |         | 77 280    | 1.2     |           |           |              |         |            |           | 77 280        | 0.2       | 0.2        | 0.0    |      |
| 650 - < 700     |              |        |                |        |            |        |              |         | 2 280     | 0.0     |           |           |              |         |            |           |               |           | 0.0        | 0.0    |      |
| 700 - < 750     |              |        |                |        |            |        |              |         |           |         |           |           |              |         |            |           | 4 800         | 0.0       | 0.1        | 0.0    |      |
| > 1000          |              |        |                |        |            |        |              |         |           |         |           |           |              |         |            |           | 4 800         | 0.0       | 0.0        | 0.0    |      |
| TOTAL           | 2 596 270    | 100.0  | 2 937 130      | 100.0  | 1 765 123  | 100.0  | 2 069 810    | 100.0   | 6 487 864 | 100.0   | 4 727 810 | 100.0     | 4 421 809    | 100.0   | 23 923 507 | 100.0     | 48 929 323    | 100.0     | 100.0      | 100.0  |      |
| AVE PRICE       |              | 250.85 |                | 294.08 |            | 285.90 |              | 280.14  |           | 419.94  |           | 313.69    |              | 329.35  |            | 313.69    |               | 322.26    | 323.17     | 317.27 |      |
| AVE PRICE       |              |        |                |        |            |        |              |         |           |         |           |           |              |         | 6 200      | 450.00    | 6 200         | 450.00    | 6 200      | 450.00 |      |
| 150 - < 200     |              |        |                |        |            |        |              |         |           |         |           |           |              |         | 12 615     | 0.1       | 12 615        | 0.0       | 0.0        | 0.0    |      |
| 200 - < 250     | 909 530      | 14.4   | 24 020         | 0.6    |            |        | 24 156       | 15.7    | 158 770   | 2.9     | 158 770   | 2.9       |              |         |            |           | 1 116 476     | 3.9       | 1.4        | 1.6    |      |
| 250 - < 300     | 5 397 230    | 85.2   | 3 035 489      | 76.4   |            |        | 30 250       | 19.7    | 2 188 565 | 39.5    | 2 188 565 | 39.5      | 1 139 595    | 90.9    | 3 686 094  | 38.0      | 15 963 263    | 54.1      | 54.1       | 49.6   |      |
| 300 - < 350     | 30 800       | 0.5    | 912 864        | 23.0   |            |        | 99 020       | 64.5    | 1 284 400 | 23.2    | 1 284 400 | 23.2      | 114 377      | 9.1     | 3 971 487  | 40.9      | 7 450 088     | 25.9      | 31.7       | 39.7   |      |
| 350 - < 400     |              |        |                |        |            |        |              |         | 1 203 648 | 21.7    | 1 203 648 | 21.7      |              |         | 1 511 518  | 15.6      | 2 852 586     | 9.9       | 12.7       | 9.0    |      |
| 400 - < 450     |              |        |                |        | 137 420    | 81.3   | 57 560       | 3.6     | 680 420   | 12.3    | 680 420   | 12.3      | 474 800      | 4.9     | 474 800    | 4.9       | 1 212 800     | 4.2       | 0.0        | 0.0    |      |
| 450 - < 500     |              |        |                |        |            |        |              |         | 18 340    | 0.3     | 18 340    | 0.3       |              |         | 56 200     | 0.6       | 18 340        | 0.1       | 0.0        | 0.1    |      |
| 500 - < 550     |              |        |                |        | 31 600     | 18.7   |              |         |           |         |           |           |              |         |            |           | 87 800        | 0.3       | 0.0        | 0.0    |      |
| 850 - < 900     |              |        |                |        |            |        |              |         |           |         |           |           |              |         |            |           |               |           | 0.1        | 0.0    |      |
| TOTAL           | 6 337 560    | 100.0  | 3 972 373      | 100.0  | 169 020    | 100.0  | 1 580 760    | 100.0   | 153 426   | 100.0   | 5 534 143 | 100.0     | 1 253 972    | 100.0   | 9 712 714  | 100.0     | 28 713 968    | 100.0     | 100.0      | 100.0  |      |
| AVE PRICE       |              | 247.52 |                | 276.68 |            | 393.38 |              | 313.68  |           | 303.99  |           | 322.08    |              | 271.54  |            | 316.74    |               | 295.19    | 297.46     | 293.68 |      |
| 200 - < 250     |              |        |                |        |            |        |              | 14 744  | 2.9       |         |           |           |              |         |            |           | 14 744        | 0.9       | 0.0        | 0.0    |      |
| 250 - < 300     |              |        |                |        |            |        |              | 264 710 | 52.3      | 65 350  | 41.7      | 25 200    | 18.5         | 318 530 | 36.5       | 409 080   | 23.8          | 27.2      | 20.0       | 20.0   |      |
| 300 - < 350     |              |        |                |        | 46 300     | 100.0  | 210 640      | 41.6    | 210 640   | 41.6    | 91 250    | 58.3      | 62 500       | 45.9    | 195 800    | 22.4      | 560 190       | 32.6      | 54.5       | 56.4   |      |
| 350 - < 400     |              |        |                |        |            |        | 16 150       | 3.2     | 16 150    | 3.2     |           |           |              |         | 19 650     | 2.2       | 35 800        | 2.1       | 18.3       | 23.6   |      |
| 400 - < 450     |              |        |                |        |            |        |              |         | 506 244   | 100.0   | 156 600   | 100.0     | 136 050      | 100.0   | 873 480    | 100.0     | 1 718 674     | 100.0     | 100.0      | 100.0  |      |
| TOTAL           |              |        |                |        | 46 300     | 100.0  |              |         | 506 244   | 100.0   | 156 600   | 100.0     | 136 050      | 100.0   | 873 480    | 100.0     | 1 718 674     | 100.0     | 100.0      | 100.0  |      |
| AVE PRICE       |              |        |                |        |            | 330.00 |              |         | 345.52    |         | 342.44    |           | 339.11       |         | 321.65     |           | 332.18        |           | 317.82     | 323.79 |      |



# AVERAGE PRICES OF WINE SOLD IN BULK

| TYPE                   | PRICE RANGE R / HL OR C / l | 2005         |                |             | 2006         |                |             | 2007         |                |             | JAN - SEP 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    | 14 358 025     | 22 293 661  | 6 132 493      | 11 303 761     | 17 436 264  | 7.32            | 42.41       | -21.79      |
|                        | AVE PRICE R / HL OR C / l   | 515.65       | 630.04         | 596.76      | 461.22       | 507.13         | 476.23      | 419.70       | 436.45         | 430.49      | 424.43         | 446.24         | 438.57      | -20.20          | -9.60       | 1.88        |
| Cabernet Franc         | LITRES                      | 174 103      | 169 733        | 343 836     | 95 670       | 271 978        | 367 648     | 275 262      | 209 266        | 484 528     | 377 548        | 327 185        | 704 733     | 6.93            | 31.79       | 45.45       |
|                        | AVE PRICE R / HL OR C / l   | 426.05       | 342.73         | 384.92      | 369.71       | 421.64         | 408.12      | 456.03       | 411.36         | 436.73      | 414.99         | 345.58         | 382.76      | 6.03            | 7.01        | -12.36      |
| Ruby Cabernet          | LITRES                      | 2 938 759    | 4 717 838      | 7 656 597   | 1 601 831    | 4 987 484      | 6 589 315   | 2 065 812    | 3 814 518      | 5 880 330   | 2 402 266      | 3 428 365      | 5 828 631   | -13.94          | -10.76      | -0.88       |
|                        | AVE PRICE R / HL OR C / l   | 364.86       | 440.47         | 411.45      | 319.77       | 417.00         | 393.36      | 281.65       | 314.30         | 302.83      | 352.37         | 337.02         | 343.35      | -4.40           | -23.01      | 13.38       |
| 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  | 3 714 169      | 7 353 441      | 11 067 610  | -22.65          | 38.81       | -10.38      |
|                        | AVE PRICE R / HL OR C / l   | 440.36       | 488.24         | 471.33      | 349.77       | 456.47         | 426.29      | 392.80       | 399.13         | 396.68      | 385.51         | 415.05         | 405.14      | -9.56           | -6.95       | 2.13        |
| Shiraz                 | LITRES                      | 4 551 037    | 7 197 807      | 11 748 844  | 5 742 215    | 8 595 511      | 14 337 726  | 8 454 908    | 11 481 854     | 19 936 762  | 7 643 510      | 10 760 065     | 18 403 575  | 22.04           | 39.05       | -7.69       |
|                        | AVE PRICE R / HL OR C / l   | 485.10       | 588.12         | 548.21      | 521.99       | 509.28         | 514.37      | 446.09       | 468.97         | 458.12      | 484.29         | 440.43         | 458.64      | -6.17           | -10.94      | 0.11        |
| Pinotage               | LITRES                      | 7 314 746    | 9 333 874      | 16 648 620  | 6 137 551    | 8 638 914      | 14 776 465  | 5 254 275    | 7 606 814      | 12 861 069  | 3 766 003      | 7 687 430      | 11 453 433  | -11.25          | -12.96      | -10.95      |
|                        | AVE PRICE R / HL OR C / l   | 411.37       | 469.09         | 443.73      | 378.24       | 403.28         | 392.88      | 391.10       | 400.54         | 396.68      | 396.78         | 420.48         | 412.69      | -11.46          | 0.97        | 4.04        |
| Pinot Noir             | LITRES                      | 25 320       | 26 144         | 51 464      | 40 111       | 3 000          | 43 111      | 18 318       | 52 540         | 70 858      | 44 900         | 5 400          | 50 300      | -16.23          | 64.36       | -29.01      |
|                        | AVE PRICE R / HL OR C / l   | 605.27       | 697.57         | 652.16      | 425.72       | 350.00         | 420.45      | 674.63       | 672.62         | 673.14      | 535.00         | 325.00         | 512.46      | -35.53          | 60.10       | -23.87      |
| Cinsaut                | LITRES                      | 2 062 245    | 6 300 459      | 8 362 704   | 1 595 822    | 4 654 706      | 6 250 528   | 1 804 453    | 2 779 117      | 4 583 570   | 848 217        | 3 939 652      | 4 787 869   | -25.17          | -26.67      | 4.46        |
|                        | AVE PRICE R / HL OR C / l   | 343.15       | 413.97         | 396.57      | 301.27       | 366.04         | 349.50      | 325.51       | 312.17         | 317.42      | 346.69         | 317.25         | 322.47      | -11.87          | -9.18       | 1.59        |
| 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  | 13 195 982     | 5 969 686      | 19 165 668  | 14.21           | 27.63       | 8.19        |
|                        | AVE PRICE R / HL OR C / l   | 307.26       | 297.87         | 305.31      | 304.57       | 305.27         | 304.68      | 293.09       | 310.52         | 297.13      | 326.86         | 286.00         | 313.93      | -0.21           | -2.48       | 5.65        |
| Other red and blends   | LITRES                      | 11 730 054   | 18 765 969     | 30 496 023  | 9 680 770    | 18 188 278     | 27 869 048  | 14 398 428   | 24 806 419     | 39 204 847  | 16 137 333     | 27 262 340     | 43 399 673  | -8.61           | 40.68       | 10.70       |
|                        | AVE PRICE R / HL OR C / l   | 370.42       | 392.88         | 384.24      | 372.52       | 363.70         | 366.66      | 341.46       | 333.48         | 336.41      | 369.16         | 320.13         | 338.36      | 0.63            | -13.00      | 0.58        |
| 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  | 14 738 873     | 6 151 541      | 20 888 414  | -2.12           | 4.40        | 13.04       |
|                        | AVE PRICE R / HL OR C / l   | 502.92       | 475.67         | 494.22      | 499.87       | 483.72         | 495.11      | 479.19       | 460.83         | 474.14      | 475.67         | 484.80         | 478.36      | 0.18            | -4.24       | 0.89        |
| 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  | 12 012 402     | 2 956 901      | 14 969 303  | -29.39          | 39.49       | 7.11        |
|                        | AVE PRICE R / HL OR C / l   | 526.78       | 482.31         | 522.11      | 549.52       | 537.80         | 547.53      | 522.46       | 484.21         | 517.21      | 529.30         | 492.56         | 522.04      | 4.87            | -5.54       | 0.93        |
| Chenin Blanc           | LITRES                      | 46 295 843   | 12 621 189     | 58 917 032  | 44 764 301   | 7 438 344      | 52 202 645  | 46 226 759   | 15 293 149     | 61 519 908  | 33 477 056     | 15 452 267     | 48 929 323  | -11.40          | 17.85       | -20.47      |
|                        | AVE PRICE R / HL OR C / l   | 309.13       | 287.16         | 304.43      | 319.37       | 304.63         | 317.27      | 324.41       | 319.44         | 323.17      | 331.28         | 302.72         | 322.26      | 4.22            | 1.86        | -0.28       |
| 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  | 17 011 762     | 11 702 206     | 28 713 968  | -16.47          | 6.63        | 2.99        |
|                        | AVE PRICE R / HL OR C / l   | 283.51       | 263.84         | 277.70      | 291.36       | 305.73         | 293.68      | 295.53       | 303.69         | 297.46      | 296.68         | 293.02         | 295.19      | 5.75            | 1.29        | -0.76       |
| Riesling               | LITRES                      | 2 448 590    | 543 483        | 2 992 073   | 2 493 996    | 136 950        | 2 630 946   | 2 663 039    | 1 032 640      | 3 715 679   | 1 129 124      | 589 550        | 1 718 674   | -12.07          | 41.23       | -53.75      |
|                        | AVE PRICE R / HL OR C / l   | 323.25       | 267.49         | 313.12      | 321.25       | 370.00         | 323.79      | 315.28       | 324.42         | 317.82      | 330.37         | 335.65         | 332.18      | 3.41            | -1.84       | 4.52        |
| 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   | 2 612 220      | 1 021 711      | 3 633 931   | -7.51           | 4.90        | -1.13       |
|                        | AVE PRICE R / HL OR C / l   | 335.67       | 319.71         | 332.64      | 342.15       | 339.03         | 339.03      | 354.82       | 343.09         | 352.93      | 369.77         | 354.98         | 365.91      | 1.92            | 4.10        | 3.59        |
| 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     | 192 584 137 | 76 012 045     | 60 518 439     | 136 530 484 | 0.36            | -3.15       | -10.52      |
|                        | AVE PRICE R / HL OR C / l   | 262.10       | 238.48         | 254.85      | 276.48       | 264.65         | 274.39      | 278.07       | 268.68         | 275.02      | 278.71         | 259.93         | 270.39      | 7.67            | 0.23        | -1.68       |
| Fortified              | LITRES                      | 8 009 417    | 1 275 209      | 9 284 626   | 10 148 330   | 1 147 288      | 11 295 598  | 11 090 083   | 610 995        | 11 700 678  | 4 099 223      | 2 125 949      | 6 225 172   | 21.66           | 3.59        | -46.80      |
|                        | AVE PRICE R / HL OR C / l   | 345.36       | 356.47         | 346.88      | 355.13       | 349.73         | 354.58      | 371.28       | 371.37         | 371.37      | 406.41         | 369.46         | 393.79      | 2.22            | 4.74        | 6.04        |
| 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 | 215 353 126    | 178 553 889    | 393 907 015 | -4.73           | 10.06       | -8.16       |
|                        | AVE PRICE R / HL OR C / l   | 323.59       | 364.74         | 338.35      | 323.18       | 375.74         | 338.42      | 331.40       | 340.86         | 334.87      | 346.01         | 328.44         | 338.05      | 0.02            | -1.05       | 0.95        |
| All red varieties      | LITRES                      | 46 709 860   | 66 788 604     | 113 498 464 | 44 127 869   | 64 519 342     | 108 647 211 | 58 459 222   | 76 451 962     | 134 911 184 | 54 262 421     | 78 035 325     | 132 297 746 | -4.27           | 24.17       | -1.94       |
|                        | AVE PRICE R / HL OR C / l   | 393.01       | 473.70         | 440.49      | 378.96       | 424.53         | 406.02      | 362.62       | 383.43         | 374.41      | 383.66         | 371.91         | 376.73      | -7.83           | -7.79       | 0.62        |
| All white varieties    | LITRES                      | 207 671 724  | 78 622 293     | 286 294 017 | 222 459 017  | 47 312 675     | 269 772 177 | 201 914 750  | 80 384 496     | 282 299 246 | 156 981 482    | 98 392 615     | 255 384 097 | -5.77           | 4.64        | -9.53       |
|                        | AVE PRICE R / HL OR C / l   | 307.14       | 272.31         | 297.51      | 310.66       | 309.83         | 310.51      | 320.17       | 300.13         | 314.46      | 331.42         | 293.08         | 316.65      | 4.35            | 1.27        | 0.70        |



# RSA EXPORTS: WINE AND FLAVOURED GRAPE LIQUOR

| PRODUCT                             |     | OCTOBER           |                   |               | 6 MONTHS             |                      |               | 12 MONTHS            |                      |               | Litres |
|-------------------------------------|-----|-------------------|-------------------|---------------|----------------------|----------------------|---------------|----------------------|----------------------|---------------|--------|
|                                     |     | 2007              | 2008              | Trend         | MAY '07 -<br>OCT '07 | MAY '08 -<br>OCT '08 | Trend         | NOV '06 -<br>OCT '07 | NOV '07 -<br>OCT '08 | Trend         |        |
|                                     |     |                   |                   |               |                      |                      |               |                      |                      |               |        |
| Chardonnay                          | P   | 2 320 613         | 1 546 499         | 66.64         | 9 738 181            | 9 750 950            | 100.13        | 16 870 132           | 17 086 079           | 101.28        |        |
|                                     | B   | 446 740           | 1 573 338         | 352.18        | 2 359 630            | 6 194 062            | 262.50        | 4 156 597            | 11 621 142           | 279.58        |        |
| Sauvignon Blanc                     | P   | 1 394 560         | 1 555 101         | 111.51        | 7 750 573            | 9 425 774            | 121.61        | 13 219 036           | 15 546 835           | 117.61        |        |
|                                     | B   | 248 471           | 487 530           | 196.21        | 1 947 404            | 2 034 524            | 104.47        | 3 069 901            | 4 049 293            | 131.90        |        |
| Chenin Blanc                        | P   | 1 600 156         | 1 879 710         | 117.47        | 9 684 918            | 10 449 283           | 107.89        | 16 235 854           | 18 409 181           | 113.39        |        |
|                                     | B   | 2 383 904         | 3 813 035         | 159.95        | 11 721 558           | 15 389 624           | 131.29        | 21 355 726           | 24 827 186           | 116.26        |        |
| Other White                         | P   | 3 244 809         | 4 875 938         | 150.27        | 17 051 883           | 22 859 207           | 134.06        | 31 761 394           | 39 591 498           | 124.65        |        |
|                                     | B   | 1 752 414         | 3 664 459         | 209.11        | 11 101 085           | 25 157 511           | 226.62        | 16 228 606           | 41 649 735           | 256.64        |        |
| <b>TOTALS WHITE WINE</b>            | P   | <b>8 560 138</b>  | <b>9 857 248</b>  | <b>115.15</b> | <b>44 225 555</b>    | <b>52 485 214</b>    | <b>118.68</b> | <b>78 086 416</b>    | <b>90 633 593</b>    | <b>116.07</b> |        |
|                                     | B   | <b>4 831 529</b>  | <b>9 538 362</b>  | <b>197.42</b> | <b>27 129 677</b>    | <b>48 775 721</b>    | <b>179.79</b> | <b>44 810 830</b>    | <b>82 147 356</b>    | <b>183.32</b> |        |
|                                     | P+B | <b>13 391 667</b> | <b>19 395 610</b> | <b>144.83</b> | <b>71 355 232</b>    | <b>101 260 935</b>   | <b>141.91</b> | <b>122 897 246</b>   | <b>172 780 949</b>   | <b>140.59</b> |        |
| Cabernet Sauvignon                  | P   | 1 615 217         | 1 407 937         | 87.17         | 7 104 041            | 7 612 831            | 107.16        | 13 348 459           | 13 851 544           | 103.77        |        |
|                                     | B   | 222 923           | 1 297 950         | 582.24        | 3 275 040            | 4 575 114            | 139.70        | 5 441 128            | 7 331 888            | 134.75        |        |
| Shiraz                              | P   | 1 552 594         | 2 144 662         | 138.13        | 7 704 794            | 9 814 981            | 127.39        | 14 885 763           | 17 489 746           | 117.49        |        |
|                                     | B   | 435 432           | 168 633           | 38.73         | 1 382 524            | 1 347 766            | 97.49         | 1 679 008            | 3 676 458            | 218.97        |        |
| Pinotage                            | P   | 793 373           | 732 856           | 92.37         | 4 066 267            | 4 991 982            | 122.77        | 8 636 439            | 9 411 355            | 108.97        |        |
|                                     | B   | 633 584           | 474 215           | 74.85         | 4 517 753            | 4 162 530            | 92.14         | 8 103 546            | 8 048 684            | 99.32         |        |
| Merlot                              | P   | 765 801           | 1 001 902         | 130.83        | 3 691 986            | 4 582 048            | 124.11        | 7 048 420            | 8 431 000            | 119.62        |        |
|                                     | B   | 54 340            | 211 404           | 389.04        | 796 795              | 1 112 131            | 139.58        | 1 887 061            | 3 174 790            | 168.24        |        |
| Other Red                           | P   | 7 583 806         | 7 748 677         | 102.17        | 30 891 217           | 36 583 019           | 118.43        | 58 812 214           | 66 603 493           | 113.25        |        |
|                                     | B   | 6 264 614         | 8 189 040         | 130.72        | 25 225 383           | 40 062 442           | 158.82        | 41 424 470           | 69 570 064           | 167.94        |        |
| <b>TOTALS RED WINE</b>              | P   | <b>12 310 791</b> | <b>13 036 034</b> | <b>105.89</b> | <b>53 458 305</b>    | <b>63 584 861</b>    | <b>118.94</b> | <b>102 731 295</b>   | <b>115 787 138</b>   | <b>112.71</b> |        |
|                                     | B   | <b>7 610 893</b>  | <b>10 341 242</b> | <b>135.87</b> | <b>35 197 495</b>    | <b>51 259 983</b>    | <b>145.64</b> | <b>58 535 213</b>    | <b>91 801 884</b>    | <b>156.83</b> |        |
|                                     | P+B | <b>19 921 684</b> | <b>23 377 276</b> | <b>117.35</b> | <b>88 655 800</b>    | <b>114 844 844</b>   | <b>129.54</b> | <b>161 266 508</b>   | <b>207 589 022</b>   | <b>128.72</b> |        |
| Blanc de Noir + Rosé                | P   | 874 825           | 645 216           | 73.75         | 5 423 157            | 7 776 846            | 143.40        | 8 605 730            | 12 279 887           | 142.69        |        |
|                                     | B   | 720 207           | 697 460           | 96.84         | 7 399 174            | 6 987 951            | 94.44         | 9 638 921            | 10 415 532           | 108.06        |        |
|                                     | P+B | 1 595 032         | 1 342 676         | 84.18         | 12 822 331           | 14 764 797           | 115.15        | 18 244 651           | 22 695 419           | 124.39        |        |
| <b>TOTALS NATURAL WINE</b>          | P   | <b>21 745 754</b> | <b>23 538 498</b> | <b>108.24</b> | <b>103 107 017</b>   | <b>123 846 921</b>   | <b>120.11</b> | <b>189 423 441</b>   | <b>218 700 618</b>   | <b>115.46</b> |        |
|                                     | B   | <b>13 162 629</b> | <b>20 577 064</b> | <b>156.33</b> | <b>69 726 346</b>    | <b>107 023 655</b>   | <b>153.49</b> | <b>112 984 964</b>   | <b>184 364 772</b>   | <b>163.18</b> |        |
|                                     | P+B | <b>34 908 383</b> | <b>44 115 562</b> | <b>126.38</b> | <b>172 833 363</b>   | <b>230 870 576</b>   | <b>133.58</b> | <b>302 408 405</b>   | <b>403 065 390</b>   | <b>133.29</b> |        |
| Fortified Wine                      | P   | 41 450            | 26 620            | 64.22         | 187 233              | 228 825              | 122.21        | 440 771              | 406 631              | 92.25         |        |
|                                     | B   | 0                 | 0                 | -             | 0                    | 24 080               | -             | 0                    | 47 956               | -             |        |
|                                     | P+B | 41 450            | 26 620            | 64.22         | 187 233              | 252 905              | 135.08        | 440 771              | 454 587              | 103.13        |        |
| Sparkling wine                      | P   | 523 590           | 404 073           | 77.17         | 1 433 862            | 2 187 394            | 152.55        | 2 500 235            | 3 691 560            | 147.65        |        |
| <b>TOTALS ALL WINE</b>              | P   | <b>22 310 794</b> | <b>23 969 191</b> | <b>107.43</b> | <b>104 728 112</b>   | <b>126 263 140</b>   | <b>120.56</b> | <b>192 364 447</b>   | <b>222 798 809</b>   | <b>115.82</b> |        |
|                                     | B   | <b>13 162 629</b> | <b>20 577 064</b> | <b>156.33</b> | <b>69 726 346</b>    | <b>107 047 735</b>   | <b>153.53</b> | <b>112 984 964</b>   | <b>184 412 728</b>   | <b>163.22</b> |        |
|                                     | P+B | <b>35 473 423</b> | <b>44 546 255</b> | <b>125.58</b> | <b>174 454 458</b>   | <b>233 310 875</b>   | <b>133.74</b> | <b>305 349 411</b>   | <b>407 211 537</b>   | <b>133.36</b> |        |
| OTHER(e.g. for vinegar, industrial) | P   | 0                 | 0                 | -             | 0                    | 0                    | -             | 0                    | 0                    | -             |        |
|                                     | B   | 0                 | 143 958           | -             | 0                    | 1 057 236            | -             | 0                    | 1 657 867            | -             |        |
|                                     | P+B | 0                 | 143 958           | -             | 0                    | 1 057 236            | -             | 0                    | 1 657 867            | -             |        |
| Flavoured Grape Liquor              | P   | 0                 | 0                 | -             | 408                  | 15 000               | 3676.47       | 12 775               | 15 522               | 121.50        |        |
| <b>TOTALS ALL PRODUCTS</b>          | P   | <b>22 310 794</b> | <b>23 969 191</b> | <b>107.43</b> | <b>104 728 520</b>   | <b>126 278 140</b>   | <b>120.58</b> | <b>192 377 222</b>   | <b>222 814 331</b>   | <b>115.82</b> |        |
|                                     | B   | <b>13 162 629</b> | <b>20 721 022</b> | <b>157.42</b> | <b>69 726 346</b>    | <b>108 104 971</b>   | <b>155.04</b> | <b>112 984 964</b>   | <b>186 070 595</b>   | <b>164.69</b> |        |
|                                     | P+B | <b>35 473 423</b> | <b>44 690 213</b> | <b>125.98</b> | <b>174 454 866</b>   | <b>234 383 111</b>   | <b>134.35</b> | <b>305 362 186</b>   | <b>408 884 926</b>   | <b>133.90</b> |        |

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 NOVEMBER - OCTOBER

| COUNTRY              | 200611 - 200710    |                    |                      |                    | 200711 - 200810    |                    |                      |                    | TREND 200711 - 200810 / 200611 - 200710 |            |                      |            |
|----------------------|--------------------|--------------------|----------------------|--------------------|--------------------|--------------------|----------------------|--------------------|---|------------|----------------------|------------|
|                      | WHITE              | RED                | BLANC DE NOIR / ROSÉ | TOTAL              | WHITE              | RED                | BLANC DE NOIR / ROSÉ | TOTAL              | WHITE                                   | RED        | BLANC DE NOIR / ROSÉ | TOTAL      |
| UNITED KINGDOM       | 44 995 874         | 37 192 193         | 4 637 466            | 86 825 533         | 51 900 261         | 45 092 426         | 8 941 703            | 105 934 390        | 115                                     | 121        | 193                  | 122        |
| GERMANY              | 17 276 662         | 32 897 344         | 5 324 131            | 55 498 137         | 22 919 084         | 39 463 366         | 5 513 741            | 67 896 191         | 133                                     | 120        | 104                  | 122        |
| THE NETHERLANDS      | 10 688 223         | 14 585 312         | 4 763 076            | 30 036 611         | 10 836 917         | 14 555 022         | 4 275 798            | 29 667 737         | 101                                     | 100        | 90                   | 99         |
| SWEDEN               | 10 607 021         | 14 889 128         | 60 926               | 25 557 075         | 11 551 758         | 16 301 848         | 220 899              | 28 074 505         | 109                                     | 109        | 363                  | 110        |
| ANGOLA *             | 155 996            | 6 115 305          | 339 749              | 6 611 050          | 379 271            | 25 499 994         | 37 101               | 25 906 366         | 243                                     | 417        | 11                   | 392        |
| RUSSIA               | 1 126 653          | 1 653 187          | 8 879                | 2 788 719          | 14 955 275         | 1 847 166          | 302 617              | 17 105 058         | 1 327                                   | 112        | 3 408                | 613        |
| U.S.A.               | 4 926 604          | 6 639 427          | 197 369              | 11 763 400         | 11 686 226         | 4 652 405          | 193 576              | 16 532 207         | 237                                     | 70         | 98                   | 141        |
| DENMARK              | 3 273 080          | 9 839 864          | 89 128               | 13 202 072         | 3 690 269          | 11 647 907         | 212 897              | 15 551 073         | 113                                     | 118        | 239                  | 118        |
| CANADA               | 4 297 651          | 8 845 108          | 43 205               | 13 185 964         | 6 952 208          | 7 394 115          | 108 383              | 14 454 706         | 162                                     | 84         | 251                  | 110        |
| NEW ZEALAND          | 2 633 523          | 1 647 906          | 630                  | 4 282 059          | 6 376 312          | 5 178 900          | 27 630               | 11 582 842         | 242                                     | 314        | 4 386                | 270        |
| BELGIUM              | 4 871 446          | 4 367 196          | 664 389              | 9 903 031          | 4 769 885          | 3 492 089          | 446 348              | 8 708 322          | 98                                      | 80         | 67                   | 88         |
| FRANCE               | 3 022 606          | 3 636 822          | 912 987              | 7 572 415          | 2 525 270          | 4 542 180          | 943 060              | 8 010 510          | 84                                      | 125        | 103                  | 106        |
| FINLAND              | 2 345 154          | 1 714 596          | 360                  | 4 060 110          | 2 896 366          | 2 578 009          | 31 167               | 5 505 542          | 124                                     | 150        | 8 658                | 136        |
| AUSTRALIA            | 354 991            | 323 973            | 504                  | 679 468            | 3 564 889          | 1 070 508          | 25 898               | 5 461 295          | 1 004                                   | 577        | 5 138                | 804        |
| REPUBLIC OF IRELAND  | 2 613 744          | 2 183 163          | 59 830               | 4 856 737          | 2 724 990          | 2 550 113          | 93 869               | 5 368 972          | 104                                     | 117        | 157                  | 111        |
| SWITZERLAND          | 1 853 177          | 1 589 580          | 516 152              | 3 958 909          | 3 247 362          | 1 669 630          | 351 104              | 5 268 096          | 175                                     | 105        | 68                   | 133        |
| CHINA                | 1 831 994          | 912 554            | 6 615                | 1 051 163          | 308 290            | 3 769 317          | 6 116                | 4 083 723          | 234                                     | 413        | 92                   | 388        |
| KENYA                | 778 284            | 967 260            | 15 912               | 1 761 456          | 972 844            | 1 064 897          | 17 901               | 2 055 642          | 125                                     | 110        | 113                  | 117        |
| NIGERIA *            | 133 424            | 823 666            | 4 253                | 961 343            | 220 141            | 1 769 667          | 16 473               | 2 006 281          | 165                                     | 215        | 387                  | 209        |
| NORWAY               | 215 931            | 1 082 965          | 1 124                | 1 616 640          | 287 375            | 1 496 330          | 3 002                | 1 786 707          | 133                                     | 107        | 267                  | 111        |
| JAPAN                | 458 727            | 882 803            | 2 237                | 1 343 767          | 682 811            | 1 007 206          | 5 229                | 1 695 246          | 149                                     | 114        | 234                  | 126        |
| UNITED ARAB EMIRATES | 431 744            | 412 581            | 16 259               | 860 584            | 649 327            | 696 220            | 34 869               | 1 380 416          | 150                                     | 169        | 214                  | 160        |
| TANZANIA             | 718 855            | 525 274            | 10 980               | 1 255 109          | 669 284            | 540 881            | 21 426               | 1 231 591          | 93                                      | 103        | 195                  | 98         |
| MAURITIUS *          | 538 275            | 370 242            | 162 177              | 1 070 694          | 519 928            | 465 981            | 226 255              | 1 212 164          | 97                                      | 126        | 140                  | 113        |
| POLAND               | 220 608            | 720 453            | 34 376               | 975 437            | 226 326            | 755 482            | 27 828               | 1 009 636          | 103                                     | 105        | 81                   | 104        |
| LATVIA               | 364 081            | 605 478            | 4 275                | 973 834            | 146 204            | 284 523            | 1 800                | 432 527            | 40                                      | 47         | 42                   | 44         |
| OTHER COUNTRIES      | 3 862 918          | 5 526 508          | 367 662              | 9 757 088          | 7 122 075          | 7 412 840          | 608 729              | 15 143 644         | 184                                     | 134        | 166                  | 155        |
| <b>TOTAL</b>         | <b>122 897 246</b> | <b>161 266 508</b> | <b>18 244 651</b>    | <b>302 408 405</b> | <b>172 780 948</b> | <b>207 589 022</b> | <b>22 695 419</b>    | <b>403 065 389</b> | <b>141</b>                              | <b>129</b> | <b>124</b>           | <b>133</b> |

## PACKAGED NATURAL WINE EXPORTS (LITRES) PER COUNTRY FOR THE PERIOD NOVEMBER - OCTOBER

| COUNTRY              | 200611 - 200710   |                    |                      |                    | 200711 - 200810   |                    |                      |                    | TREND 200711 - 200810 / 200611 - 200710 |            |                      |            |
|----------------------|-------------------|--------------------|----------------------|--------------------|-------------------|--------------------|----------------------|--------------------|---|------------|----------------------|------------|
|                      | WHITE             | RED                | BLANC DE NOIR / ROSÉ | TOTAL              | WHITE             | RED                | BLANC DE NOIR / ROSÉ | TOTAL              | WHITE                                   | RED        | BLANC DE NOIR / ROSÉ | TOTAL      |
| UNITED KINGDOM       | 31 157 376        | 29 794 297         | 4 037 688            | 64 989 361         | 38 972 343        | 36 909 526         | 7 271 573            | 83 153 442         | 125                                     | 124        | 180                  | 128        |
| SWEDEN               | 10 607 021        | 14 865 008         | 60 926               | 25 532 955         | 11 551 758        | 15 483 698         | 220 899              | 27 256 355         | 109                                     | 104        | 363                  | 107        |
| THE NETHERLANDS      | 7 092 559         | 9 323 035          | 2 379 124            | 18 794 718         | 8 011 205         | 9 990 632          | 2 551 185            | 20 553 022         | 113                                     | 107        | 107                  | 109        |
| GERMANY              | 4 087 067         | 10 483 478         | 827 207              | 15 397 752         | 4 315 273         | 10 406 534         | 760 355              | 15 482 162         | 106                                     | 99         | 92                   | 101        |
| DENMARK              | 2 370 480         | 7 065 637          | 77 148               | 9 513 265          | 2 776 979         | 8 815 131          | 116 798              | 11 708 908         | 117                                     | 125        | 151                  | 123        |
| U.S.A.               | 4 492 064         | 6 229 787          | 197 369              | 10 919 220         | 4 064 376         | 4 290 485          | 193 576              | 8 548 437          | 90                                      | 69         | 98                   | 78         |
| CANADA               | 2 662 470         | 4 224 365          | 43 205               | 7 330 040          | 2 582 874         | 5 019 962          | 84 233               | 7 687 069          | 97                                      | 109        | 195                  | 105        |
| BELGIUM              | 2 352 899         | 2 373 196          | 247 709              | 4 973 804          | 2 499 035         | 2 072 980          | 203 668              | 4 775 683          | 106                                     | 87         | 82                   | 96         |
| FINLAND              | 1 778 774         | 1 546 696          | 360                  | 3 325 830          | 2 399 656         | 2 216 479          | 6 917                | 4 623 052          | 135                                     | 143        | 1 921                | 139        |
| REPUBLIC OF IRELAND  | 2 590 014         | 2 183 163          | 59 830               | 4 833 007          | 2 211 351         | 1 886 027          | 93 869               | 4 191 247          | 85                                      | 86         | 157                  | 87         |
| NEW ZEALAND          | 114 503           | 317 106            | 630                  | 432 239            | 1 191 752         | 1 577 320          | 27 630               | 2 796 702          | 1 041                                   | 497        | 4 386                | 647        |
| AUSTRALIA            | 259 538           | 323 973            | 504                  | 584 015            | 1 128 105         | 1 006 488          | 25 898               | 2 160 491          | 435                                     | 311        | 5 138                | 370        |
| KENYA                | 778 284           | 967 260            | 15 912               | 1 761 456          | 962 904           | 1 054 017          | 17 901               | 2 034 822          | 124                                     | 109        | 113                  | 116        |
| NIGERIA *            | 133 424           | 823 666            | 4 253                | 961 343            | 220 141           | 1 769 667          | 16 473               | 2 006 281          | 165                                     | 215        | 387                  | 209        |
| NORWAY               | 215 931           | 1 082 965          | 1 124                | 1 300 020          | 239 339           | 1 258 316          | 3 002                | 1 500 657          | 111                                     | 116        | 267                  | 115        |
| JAPAN                | 392 607           | 882 803            | 2 237                | 1 277 647          | 424 251           | 1 007 206          | 5 229                | 1 436 686          | 108                                     | 114        | 234                  | 112        |
| UNITED ARAB EMIRATES | 431 744           | 412 581            | 16 259               | 860 584            | 649 327           | 696 220            | 34 869               | 1 380 416          | 150                                     | 169        | 214                  | 160        |
| RUSSIA               | 696 245           | 1 032 623          | 8 879                | 1 737 747          | 502 832           | 787 950            | 11 637               | 1 302 419          | 72                                      | 76         | 131                  | 75         |
| TANZANIA             | 718 855           | 525 274            | 10 980               | 1 255 109          | 669 284           | 540 881            | 21 426               | 1 231 591          | 93                                      | 103        | 195                  | 98         |
| SWITZERLAND          | 674 826           | 747 093            | 132 152              | 1 554 071          | 344 053           | 571 141            | 34 754               | 949 948            | 51                                      | 76         | 26                   | 61         |
| CHINA                | 107 994           | 497 074            | 6 615                | 611 683            | 164 850           | 719 233            | 6 116                | 890 199            | 153                                     | 145        | 92                   | 146        |
| POLAND               | 220 608           | 576 544            | 34 376               | 831 528            | 226 326           | 564 249            | 27 828               | 818 403            | 103                                     | 98         | 81                   | 98         |
| FRANCE               | 248 515           | 265 614            | 28 910               | 541 039            | 319 449           | 412 359            | 35 456               | 767 264            | 129                                     | 155        | 132                  | 142        |
| MAURITIUS *          | 266 940           | 193 662            | 82 043               | 542 645            | 300 873           | 234 978            | 107 305              | 643 156            | 113                                     | 121        | 131                  | 119        |
| LATVIA               | 364 081           | 605 478            | 4 275                | 973 834            | 146 204           | 284 523            | 1 800                | 432 527            | 40                                      | 47         | 42                   | 44         |
| OTHER COUNTRIES      | 3 271 597         | 4 988 918          | 328 015              | 8 588 530          | 3 759 053         | 6 211 136          | 399 490              | 10 369 679         | 115                                     | 124        | 122                  | 121        |
| <b>TOTAL</b>         | <b>78 086 416</b> | <b>102 731 296</b> | <b>8 605 730</b>     | <b>189 423 442</b> | <b>90 633 593</b> | <b>115 787 138</b> | <b>12 279 887</b>    | <b>218 700 618</b> | <b>116</b>                              | <b>113</b> | <b>143</b>           | <b>115</b> |

## BULK NATURAL WINE EXPORTS (LITRES) PER COUNTRY FOR THE PERIOD NOVEMBER - OCTOBER

| COUNTRY         | 200611 - 200710 |            |                      |            | 200711 - 200810 |            |                      |            | TREND 200711 - 200810 / 200611 - 200710 |     |                      |       |
|-----------------|-----------------|------------|----------------------|------------|-----------------|------------|----------------------|------------|---|-----|----------------------|-------|
|                 | WHITE           | RED        | BLANC DE NOIR / ROSÉ | TOTAL      | WHITE           | RED        | BLANC DE NOIR / ROSÉ | TOTAL      | WHITE                                   | RED | BLANC DE NOIR / ROSÉ | TOTAL |
| GERMANY         | 13 189 595      | 22 413 866 | 4 496 924            | 40 100 385 | 18 603 811      | 29 056 832 | 4 753 386            | 52 414 029 | 141                                     | 130 | 106                  | 131   |
| ANGOLA          | 0               | 5 905 113  | 330 996              | 6 236 109  | 123 880         | 24 921 712 | 30 000               | 25 075 592 | 0                                       | 422 | 9                    | 402   |
| UNITED KINGDOM  | 13 838 498      | 7 397 896  | 599 778              | 21 836 172 | 12 927 918      | 8 182 900  | 1 670 130            | 22 780 948 | 93                                      | 111 | 278                  | 104   |
| RUSSIA          | 430 408         | 620 564    | 0                    | 1 050 972  | 14 452 443      | 1 059 216  | 290 980              | 15 802 639 | 3 358                                   | 171 | 0                    | 1 504 |
| THE NETHERLANDS | 3 595 664       | 5 262 278  | 2 383 952            | 11 241 894 | 2 825 712       | 4 564 390  | 1 724 613            | 9 114 715  | 79                                      | 87  | 72                   | 81    |
| NEW ZEALAND     | 2 519 020       | 1 330 800  | 0                    | 3 849 820  | 5 184 560       | 3 601 580  | 0                    | 8 786 140  | 206                                     | 271 | 0                    | 228   |
| U.S.A.          | 434 540         | 409 640    | 0                    | 844 180    | 7 621 850       | 361 920    | 0                    | 7 983 770  | 1 754                                   | 88  | 0                    | 946   |
| FRANCE          | 2 774 091       | 3 371 208  | 886 077              | 7 031 376  | 2 205 821       | 4 129 821  | 907 604              | 7 243 246  | 80                                      | 123 | 102                  | 103   |
| CANADA          | 1 635 181       | 4 220 743  | 0                    | 5 855 924  | 4 369 334       | 2 374 153  | 24 150               | 6 767 637  | 267                                     | 56  | 0                    | 116   |
| SWITZERLAND     | 1 178 351       | 842 487    | 384 000              | 2 404 838  | 2 903 309       | 1 098 489  | 316 350              | 4 318 148  | 246                                     | 130 | 82                   | 180   |
| BELGIUM         | 2 518 547       | 1 994 000  | 416 680              | 4 929 227  | 2 270 850       | 1 419 109  | 242 680              | 3 932 639  | 90                                      | 71  | 58                   | 80    |
| DENMARK         | 902 600         | 2 774 227  | 11 980               | 3 688 807  | 913 290         | 2 832 776  | 96 099               | 3 842 165  | 101                                     | 102 | 802                  | 104   |
| AUSTRALIA       | 95 453          | 0          | 0                    | 95 453     | 2 436 784       | 864 020    | 0                    | 3 300 804  | 2 553                                   | 0   | 0                    | 3 458 |
| CHINA           | 24 000          | 415 480    | 0                    | 439 480    | 143 440         | 3 050 084  | 0                    | 3 193 524  | 598                                     | 734 | 0                    | 727   |
| CZECH REPUBLIC  | 24 090          | 167 900    | 0                    | 191 990    | 1 025 319       | 693 997    | 0                    | 1 719 316  | 4 256                                   | 413 | 0                    | 896   |
| FINLAND         | 566 380         | 167 900    | 0                    | 734 280    | 496 710         | 361 530    | 24 250               | 882 490    | 88                                      | 215 | 0                    | 120   |
| ITALY           | 481 847         | 240 720    | 48 400               | 770 967    | 385 915         | 386 179    | 48 140               | 820 234    | 80                                      | 160 | 99                   | 106   |
| MAURITIUS       | 271 335         | 176 580    | 80 134               | 528 049    | 219 055         | 231 003    | 118 950              | 569 008    | 81                                      | 131 | 148                  | 108   |
| INDIA           | 190 920         | 217 260    | 0                    | 408 180    | 382 480         | 94 500     | 71 320               | 548 300    | 200                                     | 43  | 0                    | 134   |
| THAILAND        | 50 460          | 97 484     | 0                    | 147 944    | 167 604         | 217 170    | 23 980               | 408 754    | 332                                     | 223 | 0                    | 276   |
| NORWAY          | 0               | 316 620    | 0                    | 316 620    | 48 036          | 238 014    | 0                    | 286 050    | 0                                       | 75  | 0                    | 90    |
| JAPAN           | 66 120          | 0          | 0                    | 66 120     | 258 560         | 0          | 0                    | 25         |   |     |                      |       |

## **STOCK SITUATION IN THE INDUSTRY DURING OCTOBER 2008**

The October 2008 survey at producer cellars, found that there were 310,1 million litres of natural wine stock of which 61.2% was white wine (2007 – 56.1%) and 38.8% red wine (2007 – 43.9%), refer to Table 1 and Graphs 1 and 2. From 2005 to 2007 the total stock situation increased each year, but decreased in 2008 with 62,8 million litres (16.8%) from 372,9 million litres in October 2007. The stock situation of fortified wine, including spirits was estimated at 8,0 million litres (2007 – 7,7 million litres). In 2008 there was only 105 876 litres of sparkling wine stock (2007 – 0 litres). Distilling wine and the non-alcoholic part of the wine stock (grape juice concentrate and grape juice) was 6,9 and 6,7 million litres respectively (2007 - 1,2 and 14,7 million litres).

From 2007 to 2008 the stock of both red and white wine decreased with 26.6% (43,5 million litres) and 9.2% (19,2 million litres) respectively. The stock of all red wine varieties showed a decrease from 2007 to 2008, even Pinotage, the only variety showing an increase in volume of stock in 2007. Sauvignon Blanc and Other white are the only variety/category to show an increase in stock levels in 2008. Although the latter's stock levels increased in volume, the part of the stock that is considered to be contracted, increased in the case of Sauvignon Blanc from 79.8% to 89.4% while Other white increased from 89.0% to 96.7%. Refer to Tables 2 to 4 – totals and graphs 3 to 5.

The contracted and bottled part of the total stock of natural wine accounted for 96.6%, compared to 87.3% in 2007 and 81.4% in 2006. Contracted red wine accounted for 98.6% of the total red wine stock compared to 83.4% in 2007 and 71.7% in 2006. Contracted white wine accounted for 95.4% of the total white wine stock compared to 90.3% in 2007 and 91.4% in 2006. Refer to table 2 and graphs 8 and 9.

The stock situation by region is illustrated in tables 3 to 7 and graphs 6 and 7. The Stellenbosch, Paarl and Malmesbury regions have the biggest percentage of red wine stock (49.6%), followed by Little Karoo, Robertson and Worcester (38.8%) and Olifants River and Orange River (11.6%). The biggest percentage white wine stock can be found in the Little Karoo, Robertson and Worcester regions (48.8%) followed by the Olifants River and Orange River regions (36.6%) and Stellenbosch, Paarl and Malmesbury regions (14.6%). The region with the biggest percentage stock of the total was the Little Karoo, Robertson and Worcester with 44.9% (2007 – 45.7%) followed by Stellenbosch, Paarl and Malmesbury with 28.2% (2007 – 26.8%) followed by Olifants River and Orange River with 26.9% (2007 – 27.5%). Olifants River and Orange River held the second position in 2007, but was overtaken by the Stellenbosch, Paarl and Malmesbury region in 2008.

The biggest percentage stock in respect of red wine varieties is in the Stellenbosch, Paarl and Malmesbury region, except with regards to Other red, where Little Karoo, Robertson and Worcester have the biggest stock. In respect of white varieties/categories the Little Karoo, Robertson and Worcester have the biggest percentage of stock except with regard to Colombar and Other white, where Olifants River and Orange River have the biggest stock.

TABLE 1:  
STOCK SITUATION IN THE INDUSTRY - TOTAL

|   | CURRENT VINTAGE |             |             |                |            |           |           |           |           |            |            |            | PREVIOUS VINTAGES |           |         |           |           |            | TOTAL       |            |             |            |             |            |
|---|-----------------|-------------|-------------|----------------|------------|-----------|-----------|-----------|-----------|------------|------------|------------|-------------------|-----------|---------|-----------|-----------|------------|-------------|------------|-------------|------------|-------------|------------|
|   | 2006            |             |             | 2007           |            |           | 2008      |           |           | 2006       |            |            | 2007              |           |         | 2008      |           |            | 2006        |            | 2007        |            | 2008        |            |
|   | CONTRACTED      |             |             | NOT CONTRACTED |            |           | BOTTLED   |           |           | CONTRACTED |            |            | NOT CONTRACTED    |           |         | BOTTLED   |           |            | litres      | % of total | litres      | % of total | litres      | % of total |
| <b>RED WINE</b>                         | 16 677 855      | 17 853 145  | 21 074 703  | 9 665 177      | 5 621 872  | 263 851   | 9 688     | 22 763    | 81 432    | 5 969 715  | 6 079 885  | 2 608 427  | 3 250 027         | 776 880   | 15 917  | 450 336   | 500 515   | 262 347    | 36 222 808  | 10.4%      | 30 857 080  | 8.3%       | 24 306 677  | 7.8%       |
| Cabernet Sauvignon                      | 10 379 038      | 10 429 162  | 11 256 410  | 7 134 279      | 4 396 438  | 492 559   | 1 301     | 11 875    | 22 755    | 3 759 194  | 3 463 993  | 1 256 842  | 1 854 076         | 1 426 502 | 60 824  | 309 294   | 380 135   | 156 401    | 23 477 182  | 6.7%       | 20 108 105  | 5.4%       | 13 245 791  | 4.3%       |
| Merlot                                  | 14 591 859      | 19 744 900  | 14 302 921  | 3 849 014      | 2 856 651  | 200 448   | 10 591    | 85 494    | 142 603   | 3 019 424  | 2 654 038  | 3 142 551  | 1 859 186         | 398 617   | 70 646  | 679 167   | 546 211   | 332 061    | 24 009 241  | 6.9%       | 26 285 911  | 7.0%       | 18 212 235  | 5.9%       |
| Pinotage                                | 16 330 558      | 18 046 767  | 17 844 058  | 7 366 059      | 2 827 958  | 147 751   | 20 420    | 27 384    | 69 595    | 4 167 801  | 3 262 046  | 2 632 270  | 1 497 192         | 12 599    | 526 120 | 597 909   | 366 672   | 29 908 250 | 8.5%        | 25 379 382 | 6.8%        | 21 064 146 | 6.8%        |            |
| Shiraz                                  | 33 257 940      | 37 705 357  | 32 206 895  | 10 461 829     | 6 525 289  | 328 026   | 477 520   | 648 259   | 408 537   | 14 797 743 | 12 604 868 | 9 548 400  | 2 904 930         | 1 776 190 | 106 576 | 1 165 659 | 1 862 506 | 814 082    | 63 065 621  | 18.0%      | 61 112 669  | 16.4%      | 43 412 526  | 14.0%      |
| Other red                               | 91 237 250      | 103 739 331 | 96 684 988  | 38 676 358     | 22 228 208 | 1 462 635 | 519 930   | 795 795   | 724 928   | 31 753 977 | 28 065 730 | 19 179 490 | 11 365 411        | 4 996 607 | 266 562 | 3 130 576 | 3 877 276 | 1 922 772  | 176 683 102 | 50.5%      | 163 742 947 | 43.9%      | 120 241 375 | 38.8%      |
| <b>WHITE WINE</b>                       | 10 756 305      | 10 973 294  | 10 649 318  | 2 169 156      | 3 190 645  | 554 604   | 228 723   | 389 751   | 259 069   | 550 346    | 1 072 202  | 903 040    | 52 248            | 1 025 525 | 166 155 | 136 613   | 148 528   | 86 077     | 13 893 393  | 4.0%       | 16 799 945  | 4.5%       | 12 617 263  | 4.1%       |
| Chardonnay                              | 35 345 189      | 40 837 392  | 38 909 459  | 5 976 177      | 2 514 482  | 2 287 401 | 552 854   | 810 164   | 461 790   | 1 853 461  | 1 094 208  | 1 354 579  | 11 300            | 405 996   | 186 819 | 186 819   | 152 303   | 42 259 685 | 12.1%       | 48 914 545 | 12.3%       | 43 122 182 | 13.9%       |            |
| Chenin blanc                            | 26 416 607      | 49 049 654  | 33 915 348  | 1 190 033      | 1 429 761  | 1 611 779 | 25 687    | 33 364    | 39 597    | 107 301    | 259 468    | 838 559    | 339 338           | 8 171     | 8 171   | 8 162     | 25 748    | 27 747 799 | 7.9%        | 51 119 735 | 13.7%       | 36 431 033 | 11.7%       |            |
| Colombier                               | 6 648 095       | 7 415 599   | 9 338 423   | 1 162 343      | 1 493 616  | 1 016 351 | 331 035   | 505 952   | 394 468   | 89 265     | 359 905    | 370 154    | 23 365            | 612 755   | 193 741 | 54 156    | 63 798    | 8 308 279  | 2.4%        | 10 451 135 | 2.8%        | 11 404 757 | 3.7%        |            |
| Sauvignon blanc                         | 73 430 441      | 71 158 127  | 79 601 535  | 4 217 140      | 8 679 714  | 2 815 539 | 1 628 461 | 1 650 633 | 930 122   | 1 200 891  | 2 326 560  | 2 637 463  | 130 486           | 421 464   | 58 737  | 367 329   | 425 065   | 80 974 748 | 23.1%       | 84 861 563 | 22.8%       | 86 289 253 | 27.8%       |            |
| Other white                             | 152 596 637     | 179 534 066 | 172 414 064 | 14 716 851     | 17 506 218 | 8 285 674 | 2 766 760 | 3 389 474 | 2 074 036 | 2 133 169  | 5 112 231  | 6 103 805  | 217 399           | 2 905 078 | 418 633 | 797 856   | 797 856   | 576 256    | 173 183 904 | 49.5%      | 209 146 923 | 56.1%      | 189 874 488 | 61.2%      |
| <b>TOTAL</b>                            | 243 833 887     | 283 313 397 | 289 099 072 | 53 392 209     | 39 736 426 | 9 748 309 | 3 286 290 | 4 185 269 | 2 798 964 | 33 887 146 | 33 177 961 | 25 883 295 | 11 582 810        | 7 801 685 | 685 195 | 3 883 664 | 4 675 132 | 2 501 028  | 349 867 006 | 100.0%     | 372 889 870 | 100.0%     | 310 115 863 | 100.0%     |
| Fortified wine                          | 3 579 979       | 6 533 614   | 6 603 600   | 142 486        | 3 375      | 37 240    | 105 625   | 214 855   | 199 500   | 392 487    | 599 476    | 852 299    | 69 241            | 38 489    | 51 864  | 312 783   | 289 702   | 238 579    | 4 602 601   |            | 7 679 511   |            | 7 983 162   |            |
| Sparkling wine                          | 86 914          | 12 250      |             |                |            | 576       | 143 422   |           | 62 120    | 434 452    |            |            |                   |           |         | 129 989   | 43 180    |            | 273 411     |            | 12 250      |            | 105 876     |            |
| Wine for brandy                         | 1 455 822       | 1 087 820   | 6 749 471   | 282 305        | 41 237     | 164 629   |           |           |           | 45 116     | 87 039     | 4 254      | 16 200            |           | 2 553   | 521 366   | 35 471    | 1 799 443  |             |            | 1 216 096   |            | 6 920 907   |            |
| Distilling wine                         | 4 192 331       | 14 382 984  | 6 407 986   |                | 32 307     | 8 883     | 232 712   | 274 450   | 236 969   |            |            |            |                   |           |         | 78 808    |           | 4 503 851  |             |            | 14 725 212  |            | 6 689 439   |            |
| Grape juice concentrate and grape juice | 5 837 525       | 3 947 405   | 3 462 248   | 244 809        | 38 988     | 78        |           |           |           |            |            |            | 26 726            |           |         |           |           |            | 6 109 060   |            | 3 959 404   |            | 3 462 248   |            |
| Destined for sweetening                 |                 |             |             |                |            |           |           |           |           |            |            |            |                   |           |         |           |           |            |             |            |             |            |             |            |

TABLE 2:  
STOCK SITUATION - CONTRACTED and BOTTLED VS NOT CONTRACTED

|                    | CURRENT VINTAGE        |       |       |                |       |             |            |            |       |             |        |             | PREVIOUS VINTAGES |             |        |             |        |             | TOTAL  |             |        |             |        |             |        |
|--------------------|------------------------|-------|-------|----------------|-------|-------------|------------|------------|-------|-------------|--------|-------------|-------------------|-------------|--------|-------------|--------|-------------|--------|-------------|--------|-------------|--------|-------------|--------|
|                    | 2006                   |       |       | 2007           |       |             | 2008       |            |       | 2006        |        |             | 2007              |             |        | 2008        |        |             | 2006   |             | 2007   |             | 2008   |             |        |
|                    | CONTRACTED and BOTTLED |       |       | NOT CONTRACTED |       |             | % of total |            |       | CONTRACTED  |        |             | NOT CONTRACTED    |             |        | % of total  |        |             | litre  | % of total  | litre  | % of total  | litre  | % of total  |        |
| <b>RED WINE</b>    | 23 107 604             | 63.8% | 79.3% | 24 456 328     | 68.2% | 64 007 752  | 20.7%      | 279 768    | 1.2%  | 3 222 808   | 10.4%  | 30 857 080  | 8.3%              | 24 306 677  | 7.8%   | 36 222 808  | 10.4%  | 30 857 080  | 8.3%   | 24 306 677  | 7.8%   | 36 222 808  | 10.4%  | 30 857 080  | 8.3%   |
| Cabernet Sauvignon | 14 488 827             | 61.7% | 71.0% | 14 285 165     | 60.8% | 5 822 940   | 29.0%      | 593 393    | 2.4%  | 23 477 182  | 6.9%   | 20 108 105  | 5.4%              | 13 245 791  | 4.3%   | 23 477 182  | 6.9%   | 20 108 105  | 5.4%   | 13 245 791  | 4.3%   | 23 477 182  | 6.9%   | 20 108 105  | 5.4%   |
| Merlot             | 18 301 041             | 76.2% | 87.6% | 23 030 643     | 96.3% | 3 255 268   | 12.4%      | 301 094    | 1.2%  | 24 009 241  | 6.9%   | 26 285 911  | 7.0%              | 18 212 235  | 5.9%   | 24 009 241  | 6.9%   | 26 285 911  | 7.0%   | 18 212 235  | 5.9%   | 24 009 241  | 6.9%   | 26 285 911  | 7.0%   |
| Pinotage           | 21 044 939             | 70.4% | 86.4% | 21 935 065     | 88.2% | 3 444 376   | 13.6%      | 160 350    | 0.8%  | 29 908 250  | 8.5%   | 25 379 382  | 6.8%              | 21 064 146  | 6.8%   | 29 908 250  | 8.5%   | 25 379 382  | 6.8%   | 21 064 146  | 6.8%   | 29 908 250  | 8.5%   | 25 379 382  | 6.8%   |
| Shiraz             | 49 698 862             | 78.8% | 86.4% | 52 810 990     | 90.0% | 13 366 759  | 21.2%      | 8 301 479  | 1.0%  | 63 065 621  | 18.0%  | 61 112 469  | 16.4%             | 43 412 526  | 14.0%  | 63 065 621  | 18.0%  | 61 112 469  | 16.4%  | 43 412 526  | 14.0%  | 63 065 621  | 18.0%  | 61 112 469  | 16.4%  |
| Other red          | 126 641 333            | 71.7% | 83.4% | 136 518 132    | 83.4% | 27 224 815  | 16.5%      | 1 729 197  | 1.4%  | 176 683 102 | 50.5%  | 163 742 947 | 43.9%             | 120 241 375 | 38.8%  | 176 683 102 | 50.5%  | 163 742 947 | 43.9%  | 120 241 375 | 38.8%  | 176 683 102 | 50.5%  | 163 742 947 | 43.9%  |
| <b>WHITE WINE</b>  | 11 671 987             | 84.0% | 74.9% | 12 583 775     | 74.9% | 4 216 170   | 25.1%      | 720 759    | 5.7%  | 13 893 393  | 4.0%   | 16 799 945  | 4.5%              | 12 617 263  | 4.1%   | 13 893 393  | 4.0%   | 16 799 945  | 4.5%   | 12 617 263  | 4.1%   | 13 893 393  | 4.0%   | 16 799 945  | 4.5%   |
| Chardonnay         | 36 270 208             | 85.8% | 93.6% | 42 994 067     | 94.7% | 2 920 478   | 6.4%       | 2 267 401  | 5.3%  | 42 259 685  | 12.1%  | 45 914 545  | 12.3%             | 43 122 182  | 13.9%  | 42 259 685  | 12.1%  | 45 914 545  | 12.3%  | 43 122 182  | 13.9%  | 42 259 685  | 12.1%  | 45 914 545  | 12.3%  |
| Chenin blanc       | 26 557 766             | 95.7% | 96.5% | 49 350 636     | 95.7% | 1 769 099   | 3.5%       | 1 611 719  | 4.4%  | 27 747 799  | 7.9%   | 51 119 735  | 13.7%             | 36 431 033  | 11.7%  | 27 747 799  | 7.9%   | 51 119 735  | 13.7%  | 36 431 033  | 11.7%  | 27 747 799  | 7.9%   | 51 119 735  | 13.7%  |
| Colombier          | 7 122 571              | 85.7% | 78.8% | 8 344 764      | 85.7% | 10 194 665  | 14.3%      | 2 106 371  | 2.0%  | 10 451 135  | 2.4%   | 10 451 135  | 2.8%              | 11 404 757  | 3.7%   | 10 451 135  | 2.4%   | 10 451 135  | 2.8%   | 11 404 757  | 3.7%   | 10 451 135  | 2.8%   | 11 404 757  | 3.7%   |
| Sauvignon blanc    | 76 627 122             | 94.6% | 89.0% | 75 560 385     | 89.0% | 83 424 977  | 11.0%      | 2 874 276  | 3.3%  | 89 974 748  | 23.1%  | 84 861 563  | 22.8%             | 86 289 253  | 27.8%  | 89 974 748  | 23.1%  | 84 861 563  | 22.8%  | 86 289 253  | 27.8%  | 89 974 748  | 23.1%  | 84 861 563  | 22.8%  |
| Other white        | 158 248 624            | 91.4% | 90.3% | 188 833 627    | 90.3% | 20 313 206  | 9.7%       | 8 704 307  | 6.6%  | 173 183 904 | 49.5%  | 209 146 923 | 56.1%             | 189 874 488 | 61.2%  | 173 183 904 | 49.5%  | 209 146 923 | 56.1%  | 189 874 488 | 61.2%  | 173 183 904 | 49.5%  | 209 146 923 | 56.1%  |
| <b>TOTAL</b>       | 284 899 987            | 81.4% | 87.3% | 325 351 759    | 87.3% | 299 662 359 | 96.6%      | 64 976 079 | 18.6% | 349 867 006 | 100.0% | 372 889 870 | 100.0%            | 310 115 863 | 100.0% | 349 867 006 | 100.0% | 372 889 870 | 100.0% | 310 115 863 | 100.0% | 349 867 006 | 100.0% | 372 889 870 | 100.0% |

**TABLE 3:**  
**STOCK SITUATION - VARIOUS REGIONS' STOCK AS % OF TOTAL**

|                    | TOTAL              |               |                    |               |                    |               | LK, ROB & WORC     |              |                    |              |                    |              | OLIFANTS- & ORANGE |              |                    |              |                   |              | STB, PRL & MALM    |              |                   |              |                   |              |
|--------------------|--------------------|---------------|--------------------|---------------|--------------------|---------------|--------------------|--------------|--------------------|--------------|--------------------|--------------|--------------------|--------------|--------------------|--------------|-------------------|--------------|--------------------|--------------|-------------------|--------------|-------------------|--------------|
|                    | 2006               |               | 2007               |               | 2008               |               | % of total         |              | 2006               |              | 2007               |              | 2008               |              | % of total         |              | 2006              |              | 2007               |              | 2008              |              | % of total        |              |
|                    | litres             | % of total    | litres             | % of total    | litres             | % of total    | litres             | % of total   | litres             | % of total   | litres             | % of total   | litres             | % of total   | litres             | % of total   | litres            | % of total   | litres             | % of total   | litres            | % of total   | litres            | % of total   |
|                    |                    |               |                    |               |                    |               |                    |              |                    |              |                    |              |                    |              |                    |              |                   |              |                    |              |                   |              |                   |              |
| Cabernet Sauvignon | 36 222 808         | 10.4%         | 30 857 080         | 8.3%          | 24 306 677         | 7.8%          | 14 399 596         | 39.8%        | 13 402 145         | 43.4%        | 9 810 132          | 40.4%        | 3 495 489          | 9.6%         | 3 351 429          | 12.8%        | 1 481 604         | 6.1%         | 18 327 723         | 50.6%        | 13 503 507        | 43.8%        | 13 014 942        | 53.5%        |
| Merlot             | 23 477 182         | 6.7%          | 20 108 105         | 5.4%          | 13 245 791         | 4.3%          | 9 795 610          | 41.7%        | 8 037 361          | 40.0%        | 5 955 851          | 45.0%        | 3 413 209          | 14.5%        | 3 489 197          | 17.4%        | 886 320           | 6.7%         | 10 288 363         | 43.7%        | 8 581 548         | 42.7%        | 6 403 619         | 48.3%        |
| Pinotage           | 24 009 241         | 6.9%          | 26 285 911         | 7.0%          | 18 212 235         | 5.9%          | 7 628 333          | 31.8%        | 7 215 452          | 27.4%        | 4 470 743          | 24.5%        | 4 728 545          | 19.7%        | 5 281 391          | 20.1%        | 2 357 760         | 12.9%        | 11 652 363         | 48.5%        | 13 789 088        | 52.5%        | 11 383 733        | 62.5%        |
| Shiraz             | 29 908 250         | 8.5%          | 25 379 382         | 6.8%          | 21 064 146         | 6.8%          | 11 907 601         | 39.8%        | 10 175 589         | 42.1%        | 6 249 541          | 29.7%        | 5 162 145          | 17.2%        | 4 937 239          | 19.5%        | 3 097 658         | 14.7%        | 12 848 505         | 43.0%        | 10 266 554        | 40.5%        | 11 716 947        | 55.6%        |
| Other red          | 63 065 621         | 18.0%         | 61 112 469         | 16.4%         | 43 412 526         | 14.0%         | 28 311 497         | 44.9%        | 25 908 644         | 42.4%        | 20 141 903         | 46.4%        | 12 807 660         | 20.3%        | 9 542 970          | 15.6%        | 6 145 070         | 14.2%        | 21 946 464         | 34.8%        | 25 660 855        | 42.0%        | 17 125 552        | 39.4%        |
| <b>Total red</b>   | <b>176 683 102</b> | <b>50.5%</b>  | <b>163 742 947</b> | <b>43.9%</b>  | <b>120 241 375</b> | <b>38.8%</b>  | <b>72 042 637</b>  | <b>40.8%</b> | <b>64 739 191</b>  | <b>39.5%</b> | <b>46 628 170</b>  | <b>38.8%</b> | <b>29 597 048</b>  | <b>16.8%</b> | <b>27 202 226</b>  | <b>16.6%</b> | <b>13 968 412</b> | <b>11.6%</b> | <b>75 043 418</b>  | <b>42.5%</b> | <b>71 801 532</b> | <b>43.9%</b> | <b>59 644 793</b> | <b>49.6%</b> |
| Chardonnay         | 13 893 393         | 4.0%          | 16 799 945         | 4.5%          | 12 617 263         | 4.1%          | 8 938 167          | 64.3%        | 11 786 600         | 70.2%        | 7 905 678          | 62.7%        | 1 965 644          | 14.1%        | 1 823 329          | 10.9%        | 1 670 518         | 13.2%        | 2 989 561          | 21.5%        | 3 190 015         | 19.0%        | 3 041 068         | 24.1%        |
| Chenin blanc       | 42 259 665         | 12.1%         | 45 914 545         | 12.3%         | 43 122 182         | 13.9%         | 19 631 420         | 46.5%        | 27 135 964         | 59.1%        | 22 577 933         | 52.4%        | 11 580 140         | 27.4%        | 7 682 631          | 16.7%        | 8 473 557         | 19.7%        | 11 048 126         | 26.1%        | 11 095 961        | 24.2%        | 12 070 692        | 28.0%        |
| Colombar           | 27 747 799         | 7.9%          | 51 119 735         | 13.7%         | 36 431 033         | 11.7%         | 11 383 978         | 41.0%        | 15 341 337         | 30.0%        | 17 446 745         | 47.9%        | 15 719 978         | 56.7%        | 34 669 683         | 67.8%        | 18 253 809        | 50.1%        | 643 842            | 2.3%         | 1 108 715         | 2.2%         | 730 479           | 2.0%         |
| Sauvignon blanc    | 8 308 279          | 2.4%          | 10 451 135         | 2.8%          | 11 404 757         | 3.7%          | 4 449 446          | 53.6%        | 6 898 454          | 66.0%        | 7 586 836          | 66.5%        | 1 602 588          | 19.3%        | 1 516 396          | 14.5%        | 1 804 162         | 15.8%        | 2 256 245          | 27.2%        | 2 036 286         | 19.5%        | 2 013 759         | 17.7%        |
| Other white        | 80 974 748         | 23.1%         | 84 861 563         | 22.8%         | 86 299 253         | 27.8%         | 33 210 093         | 41.0%        | 44 619 629         | 52.6%        | 37 108 658         | 43.0%        | 38 001 088         | 46.8%        | 29 572 900         | 34.8%        | 39 284 787        | 45.5%        | 9 763 567          | 12.1%        | 10 669 034        | 12.6%        | 9 906 808         | 11.5%        |
| <b>Total white</b> | <b>173 183 904</b> | <b>49.5%</b>  | <b>209 146 923</b> | <b>56.1%</b>  | <b>189 874 488</b> | <b>61.2%</b>  | <b>77 613 104</b>  | <b>44.8%</b> | <b>105 781 974</b> | <b>50.6%</b> | <b>92 625 850</b>  | <b>48.8%</b> | <b>68 869 438</b>  | <b>39.8%</b> | <b>75 264 939</b>  | <b>36.0%</b> | <b>69 486 833</b> | <b>36.6%</b> | <b>26 701 361</b>  | <b>15.4%</b> | <b>28 100 011</b> | <b>13.4%</b> | <b>27 761 806</b> | <b>14.6%</b> |
| <b>TOTAL</b>       | <b>349 867 006</b> | <b>100.0%</b> | <b>372 889 870</b> | <b>100.0%</b> | <b>310 115 863</b> | <b>100.0%</b> | <b>149 655 741</b> | <b>42.8%</b> | <b>170 521 165</b> | <b>45.7%</b> | <b>139 254 020</b> | <b>44.9%</b> | <b>98 466 486</b>  | <b>28.1%</b> | <b>102 467 165</b> | <b>27.5%</b> | <b>83 455 245</b> | <b>26.9%</b> | <b>101 744 779</b> | <b>29.1%</b> | <b>99 901 543</b> | <b>26.8%</b> | <b>87 406 599</b> | <b>28.2%</b> |

**TABLE 4:**  
**STOCK SITUATION - VARIOUS REGIONS, % DECREASE OR INCREASE IN STOCK LEVELS**

|                    | TOTAL              |               |                    | LK, ROB & WORC |               |                    | OLIFANTS- & ORANGE |                   |               | STB, PRL & MALM   |               |                   |               |        |      |        |   |  |
|--------------------|--------------------|---------------|--------------------|----------------|---------------|--------------------|--------------------|-------------------|---------------|-------------------|---------------|-------------------|---------------|--------|------|--------|---|--|
|                    | 2007               |               | 2008               |                | ±             |                    | 2007               |                   | 2008          |                   | ±             |                   | 2007          |        | 2008 |        | ± |  |
|                    | litres             | %             | litres             | %              |               | litres             | %                  | litres            | %             | litres            | %             | litres            | %             | litres | %    | litres | % |  |
|                    |                    |               |                    |                |               |                    |                    |                   |               |                   |               |                   |               |        |      |        |   |  |
| Cabernet Sauvignon | 30 857 080         | -21.2%        | 24 306 677         | -21.2%         | -26.8%        | 3 951 429          | -26.8%             | 1 481 604         | -62.5%        | 13 503 507        | -3.6%         | 13 014 942        | -3.6%         |        |      |        |   |  |
| Merlot             | 20 108 105         | -34.1%        | 13 245 791         | -34.1%         | -25.9%        | 3 489 197          | -25.9%             | 886 320           | -74.6%        | 8 581 548         | -25.4%        | 6 403 619         | -25.4%        |        |      |        |   |  |
| Pinotage           | 26 285 911         | -30.7%        | 18 212 235         | -30.7%         | -38.0%        | 5 281 391          | -38.0%             | 2 357 760         | -55.4%        | 13 789 068        | -17.4%        | 11 383 733        | -17.4%        |        |      |        |   |  |
| Shiraz             | 25 379 382         | -17.0%        | 21 064 146         | -17.0%         | -38.6%        | 4 937 239          | -38.6%             | 3 097 658         | -37.3%        | 10 266 554        | 14.1%         | 11 716 947        | 14.1%         |        |      |        |   |  |
| Other red          | 61 112 469         | -29.0%        | 43 412 526         | -29.0%         | -22.3%        | 9 542 970          | -22.3%             | 6 145 070         | -35.6%        | 25 660 855        | -33.3%        | 17 125 552        | -33.3%        |        |      |        |   |  |
| <b>Total red</b>   | <b>163 742 947</b> | <b>-26.6%</b> | <b>120 241 375</b> | <b>-26.6%</b>  | <b>-28.0%</b> | <b>27 202 226</b>  | <b>-28.0%</b>      | <b>13 968 412</b> | <b>-48.6%</b> | <b>71 801 532</b> | <b>-16.9%</b> | <b>59 644 793</b> | <b>-16.9%</b> |        |      |        |   |  |
| Chardonnay         | 16 799 945         | -24.9%        | 12 617 263         | -24.9%         | -32.9%        | 1 823 329          | -32.9%             | 1 670 518         | -8.4%         | 3 190 015         | -4.7%         | 3 041 068         | -4.7%         |        |      |        |   |  |
| Chenin blanc       | 45 914 545         | -6.1%         | 43 122 182         | -6.1%          | -16.8%        | 7 682 631          | -16.8%             | 8 473 557         | 10.3%         | 11 095 961        | 8.8%          | 12 070 692        | 8.8%          |        |      |        |   |  |
| Colombar           | 51 119 735         | -28.7%        | 36 431 033         | -28.7%         | 13.7%         | 34 669 683         | 13.7%              | 18 253 809        | -47.3%        | 1 108 715         | -34.1%        | 730 479           | -34.1%        |        |      |        |   |  |
| Sauvignon blanc    | 10 451 135         | 9.1%          | 11 404 757         | 9.1%           | 10.0%         | 1 516 396          | 10.0%              | 1 804 162         | 19.0%         | 2 036 286         | -1.1%         | 2 013 759         | -1.1%         |        |      |        |   |  |
| Other white        | 84 861 563         | 1.7%          | 86 299 253         | 1.7%           | -16.8%        | 29 572 900         | -16.8%             | 39 284 787        | 32.8%         | 10 669 034        | -7.2%         | 9 906 808         | -7.2%         |        |      |        |   |  |
| <b>Total white</b> | <b>209 146 923</b> | <b>-9.2%</b>  | <b>189 874 488</b> | <b>-9.2%</b>   | <b>-12.4%</b> | <b>75 264 939</b>  | <b>-12.4%</b>      | <b>69 486 833</b> | <b>-7.7%</b>  | <b>28 100 011</b> | <b>-1.2%</b>  | <b>27 761 806</b> | <b>-1.2%</b>  |        |      |        |   |  |
| <b>TOTAL</b>       | <b>372 889 870</b> | <b>-16.8%</b> | <b>310 115 863</b> | <b>-16.8%</b>  | <b>-18.3%</b> | <b>102 467 165</b> | <b>-18.3%</b>      | <b>83 455 245</b> | <b>-18.6%</b> | <b>99 901 543</b> | <b>-12.5%</b> | <b>87 406 599</b> | <b>-12.5%</b> |        |      |        |   |  |

**TABLE 5:  
STOCK SITUATION IN THE LITTLE KAROO, WORCESTER AND ROBERTSON**

|                    | 2008 VINTAGE       |                  |                | PREVIOUS VINTAGES |                |                | LITRES<br>TOTAL    |
|--------------------|--------------------|------------------|----------------|-------------------|----------------|----------------|--------------------|
|                    | CONTRACTED         | NOT CONTRACTED   | BOTTLED        | CONTRACTED        | NOT CONTRACTED | BOTTLED        |                    |
| <b>RED WINE</b>    |                    |                  |                |                   |                |                |                    |
| Cabernet Sauvignon | 9 173 194          | 148 568          | 9 111          | 390 355           | 2 100          | 86 804         | 9 810 132          |
| Merlot             | 5 504 736          | 59 375           | 5 121          | 355 844           |                | 30 775         | 5 955 851          |
| Pinotage           | 4 011 026          | 105 290          | 7 056          | 272 001           | 11 422         | 63 948         | 4 470 743          |
| Shiraz             | 5 452 731          | 60 757           |                | 640 264           | 10 098         | 85 691         | 6 249 541          |
| Other red          | 17 184 012         | 89 407           | 64 817         | 2 476 917         |                | 250 483        | 20 141 904         |
| <b>Total red</b>   | <b>41 325 699</b>  | <b>463 397</b>   | <b>86 105</b>  | <b>4 135 381</b>  | <b>99 888</b>  | <b>517 701</b> | <b>46 628 171</b>  |
| <b>WHITE WINE</b>  |                    |                  |                |                   |                |                |                    |
| Chardonnay         | 7 096 853          | 312 186          | 55 125         | 246 467           | 165 651        | 29 396         | 7 905 678          |
| Chenin blanc       | 20 164 104         | 1 048 030        | 157 463        | 1 204 642         |                | 3 695          | 22 577 934         |
| Colombar           | 15 674 203         | 1 203 367        | 21 172         | 545 032           |                | 2 971          | 17 446 745         |
| Sauvignon blanc    | 6 398 100          | 512 119          | 188 593        | 295 042           | 176 096        | 16 886         | 7 586 836          |
| Other white        | 34 607 271         | 401 070          | 234 689        | 1 748 222         | 58 121         | 59 285         | 37 108 658         |
| <b>Total white</b> | <b>83 940 531</b>  | <b>3 476 772</b> | <b>657 042</b> | <b>4 039 405</b>  | <b>399 868</b> | <b>112 233</b> | <b>92 625 851</b>  |
| <b>TOTAL</b>       | <b>125 266 230</b> | <b>3 940 169</b> | <b>743 147</b> | <b>8 174 786</b>  | <b>499 756</b> | <b>629 934</b> | <b>139 254 022</b> |

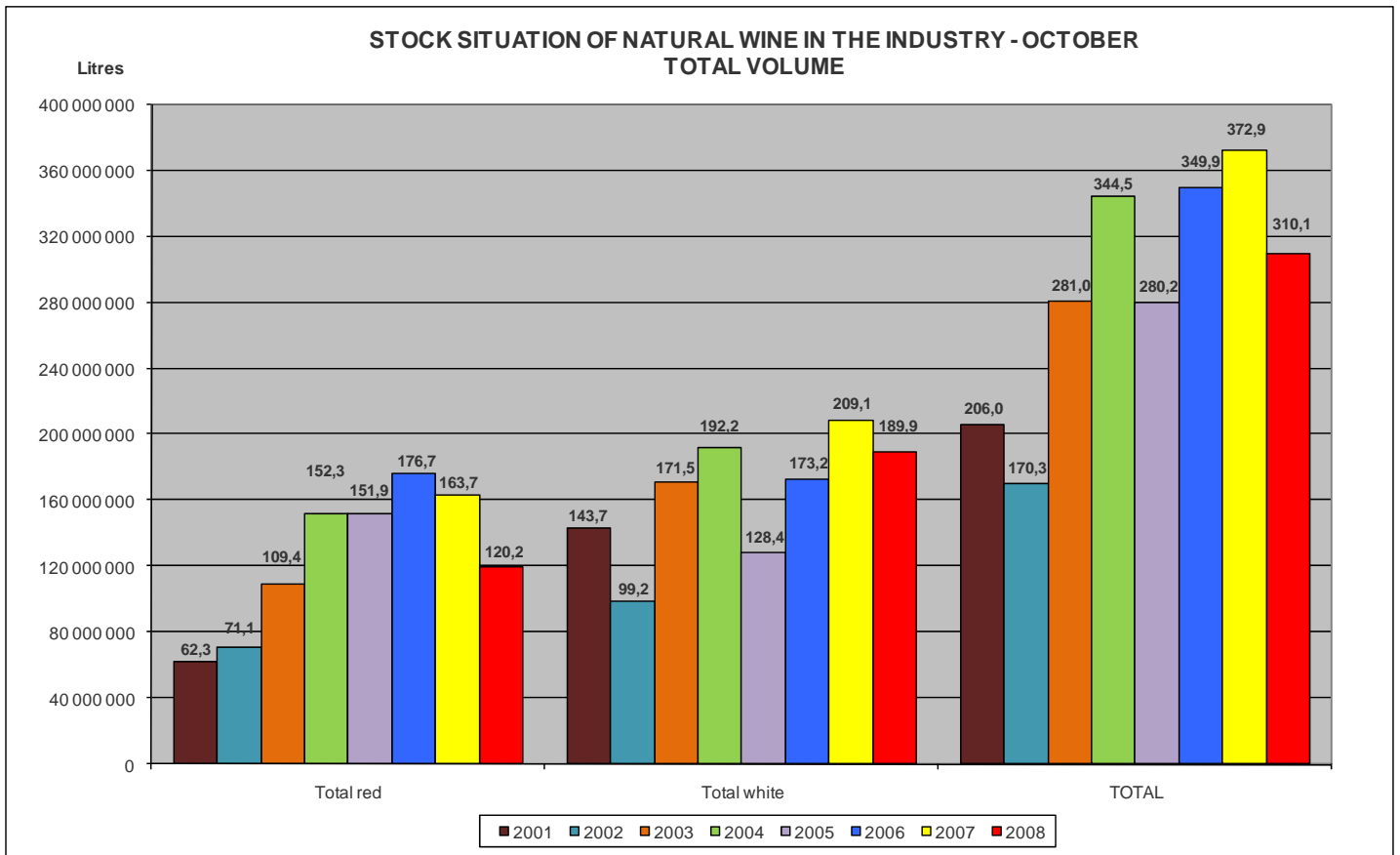
**TABLE 6:  
STOCK SITUATION IN THE OLIFANTS RIVER AND ORANGE RIVER**

|                    | 2008 VINTAGE      |                  |                | PREVIOUS VINTAGES |                |                | LITRES<br>TOTAL   |
|--------------------|-------------------|------------------|----------------|-------------------|----------------|----------------|-------------------|
|                    | CONTRACTED        | NOT CONTRACTED   | BOTTLED        | CONTRACTED        | NOT CONTRACTED | BOTTLED        |                   |
| <b>RED WINE</b>    |                   |                  |                |                   |                |                |                   |
| Cabernet Sauvignon | 1 147 644         | 41 444           | 21 794         | 254 929           |                | 15 793         | 1 481 604         |
| Merlot             | 748 571           | 62 146           | 2 914          | 58 978            |                | 13 712         | 886 321           |
| Pinotage           | 2 173 473         |                  | 16 155         | 143 128           |                | 25 004         | 2 357 760         |
| Shiraz             | 2 972 126         |                  | 22 221         | 71 187            |                | 32 124         | 3 097 658         |
| Other red          | 5 682 883         |                  | 47 752         | 332 965           |                | 81 471         | 6 145 071         |
| <b>Total red</b>   | <b>12 724 697</b> | <b>103 590</b>   | <b>110 836</b> | <b>861 187</b>    |                | <b>168 104</b> | <b>13 968 414</b> |
| <b>WHITE WINE</b>  |                   |                  |                |                   |                |                |                   |
| Chardonnay         | 1 619 798         |                  | 23 976         | 1 350             |                | 25 394         | 1 670 518         |
| Chenin blanc       | 8 176 295         | 207 907          | 72 374         |                   |                | 16 980         | 8 473 556         |
| Colombar           | 17 770 645        | 180 033          | 18 415         | 263 374           |                | 21 342         | 18 253 809        |
| Sauvignon blanc    | 1 447 844         | 298 728          | 16 438         | 14 972            |                | 26 181         | 1 804 163         |
| Other white        | 36 814 860        | 1 434 480        | 300 002        | 729 772           |                | 5 673          | 39 284 787        |
| <b>Total white</b> | <b>65 829 442</b> | <b>2 121 148</b> | <b>431 205</b> | <b>1 009 468</b>  |                | <b>95 570</b>  | <b>69 486 833</b> |
| <b>TOTAL</b>       | <b>78 554 139</b> | <b>2 224 738</b> | <b>542 041</b> | <b>1 870 655</b>  |                | <b>263 674</b> | <b>83 455 247</b> |

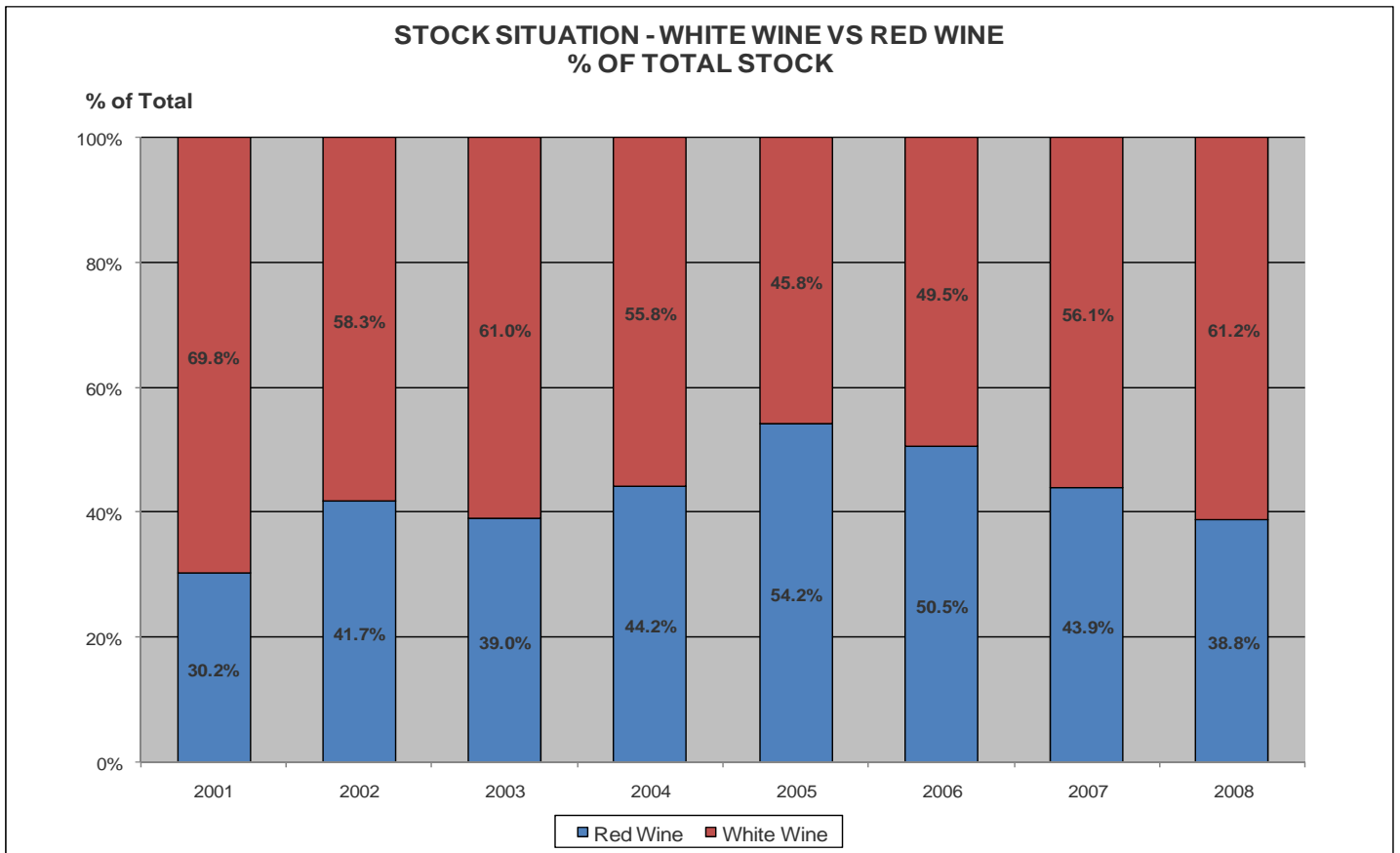
**TABLE 7:  
STOCK SITUATION IN STELLENBOSCH, PAARL AND MALMESBURY**

|                    | 2008 VINTAGE      |                  |                  | PREVIOUS VINTAGES |                |                  | LITRES<br>TOTAL   |
|--------------------|-------------------|------------------|------------------|-------------------|----------------|------------------|-------------------|
|                    | CONTRACTED        | NOT CONTRACTED   | BOTTLED          | CONTRACTED        | NOT CONTRACTED | BOTTLED          |                   |
| <b>RED WINE</b>    |                   |                  |                  |                   |                |                  |                   |
| Cabernet Sauvignon | 10 753 865        | 73 839           | 50 527           | 1 963 143         | 13 817         | 159 751          | 13 014 942        |
| Merlot             | 5 003 103         | 371 038          | 14 720           | 842 020           | 60 824         | 111 914          | 6 403 619         |
| Pinotage           | 8 118 422         | 125 158          | 119 398          | 2 727 422         | 59 224         | 234 109          | 11 383 733        |
| Shiraz             | 9 419 202         | 86 994           | 47 375           | 1 911 819         | 2 501          | 249 057          | 11 716 948        |
| Other red          | 9 340 000         | 238 619          | 295 968          | 6 738 518         | 30 308         | 482 139          | 17 125 552        |
| <b>Total red</b>   | <b>42 634 592</b> | <b>895 648</b>   | <b>527 988</b>   | <b>14 182 922</b> | <b>166 674</b> | <b>1 236 970</b> | <b>59 644 794</b> |
| <b>WHITE WINE</b>  |                   |                  |                  |                   |                |                  |                   |
| Chardonnay         | 1 932 667         | 242 418          | 178 968          | 655 223           | 504            | 31 288           | 3 041 068         |
| Chenin blanc       | 10 569 060        | 1 031 464        | 221 953          | 149 937           |                | 98 279           | 12 070 693        |
| Colombar           | 470 501           | 228 379          |                  | 30 163            |                | 1 436            | 730 479           |
| Sauvignon blanc    | 1 492 479         | 205 504          | 189 437          | 60 140            | 17 645         | 48 554           | 2 013 759         |
| Other white        | 8 179 404         | 979 989          | 395 432          | 159 469           | 616            | 190 899          | 9 905 809         |
| <b>Total white</b> | <b>22 644 111</b> | <b>2 687 754</b> | <b>985 790</b>   | <b>1 054 932</b>  | <b>18 765</b>  | <b>370 456</b>   | <b>27 761 808</b> |
| <b>TOTAL</b>       | <b>65 278 703</b> | <b>3 583 402</b> | <b>1 513 778</b> | <b>15 237 854</b> | <b>185 439</b> | <b>1 607 426</b> | <b>87 406 602</b> |

**GRAPH 1:**

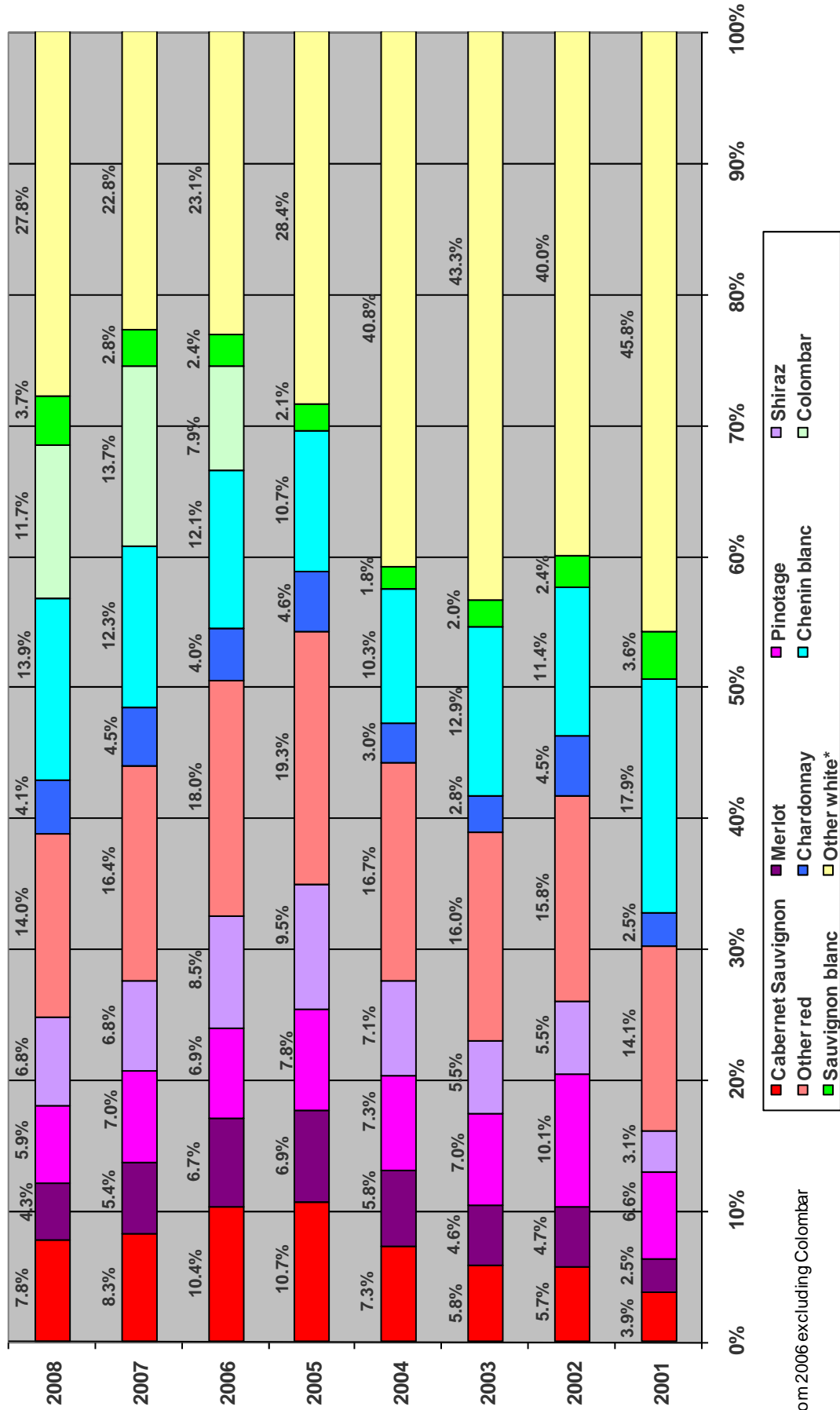


**GRAPH 2:**



**GRAPH 3:**

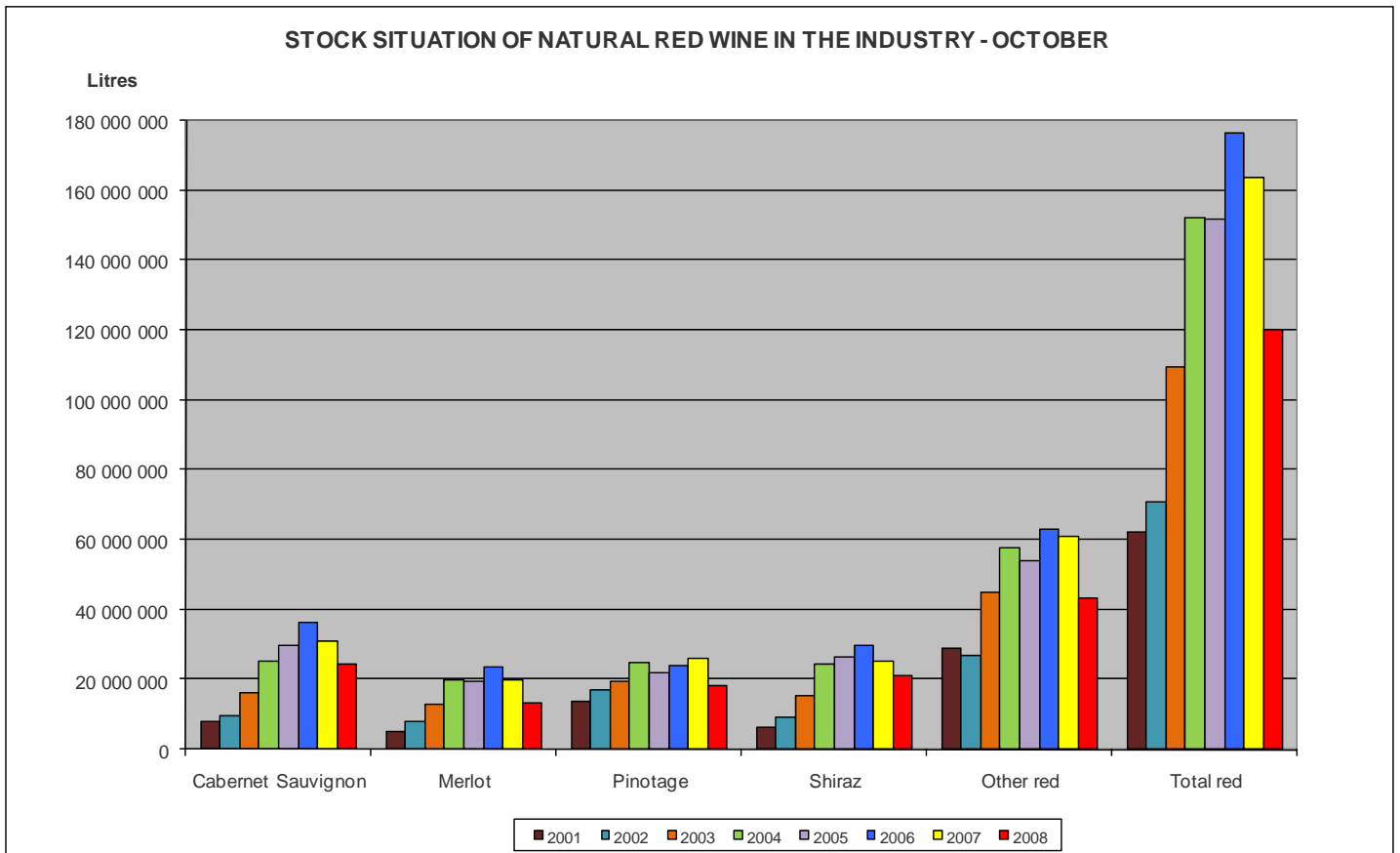
**STOCK SITUATION OF NATURAL WINE IN THE INDUSTRY- OCTOBER  
VARIETIES AS PERCENTAGE OF TOTAL**



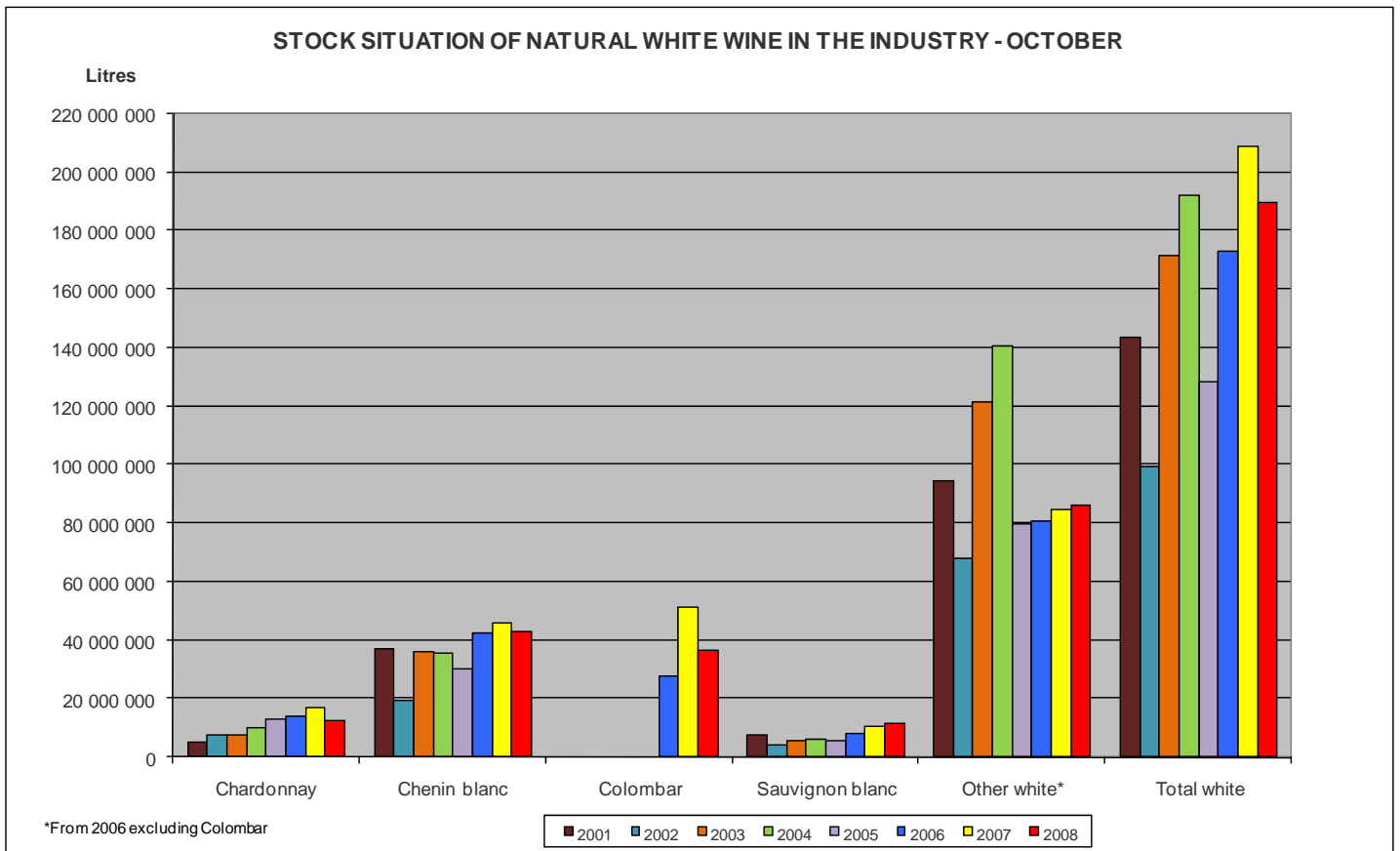
\*From 2006 excluding Colombar



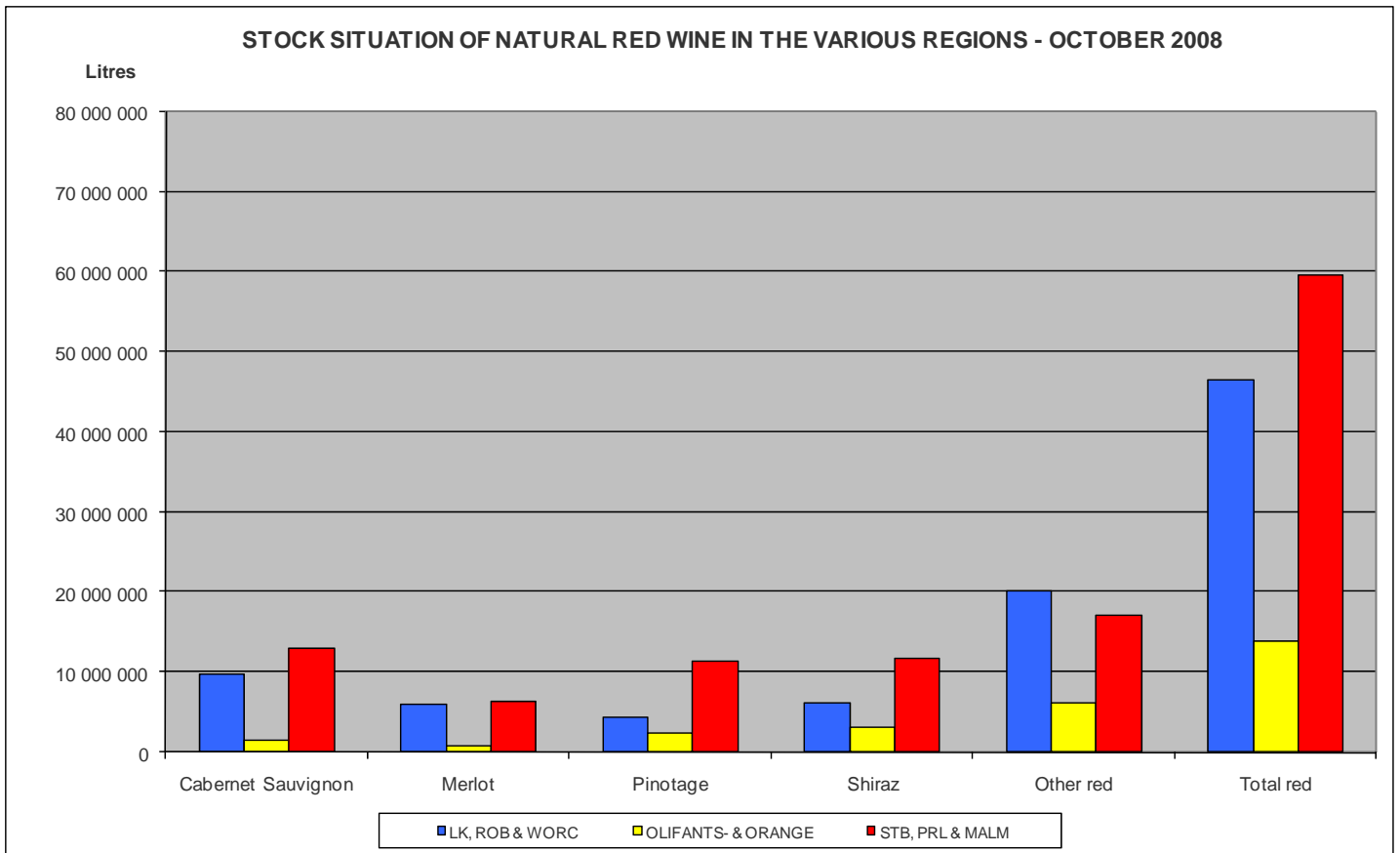
**GRAPH 4:**



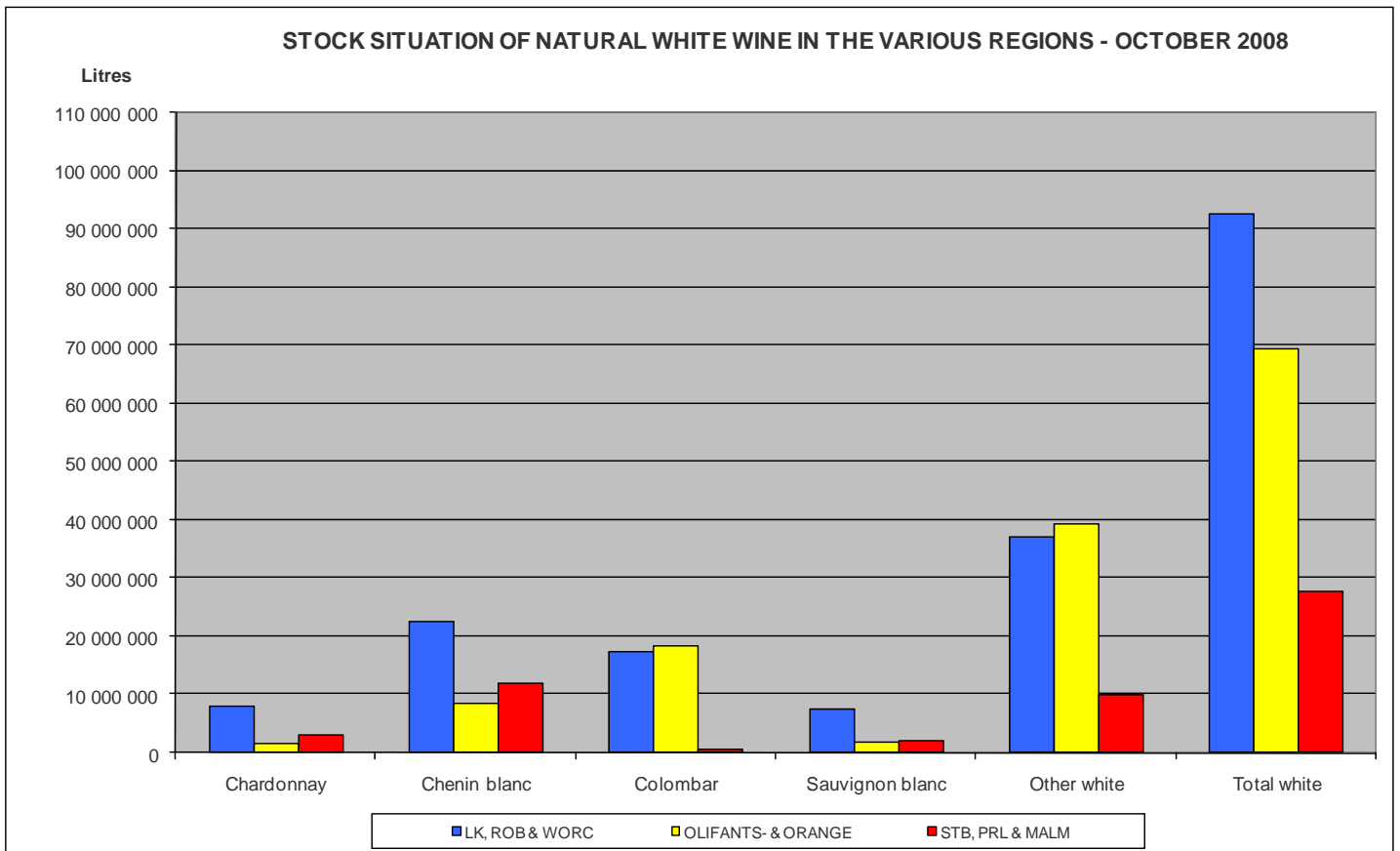
**GRAPH 5:**



**GRAPH 6:**

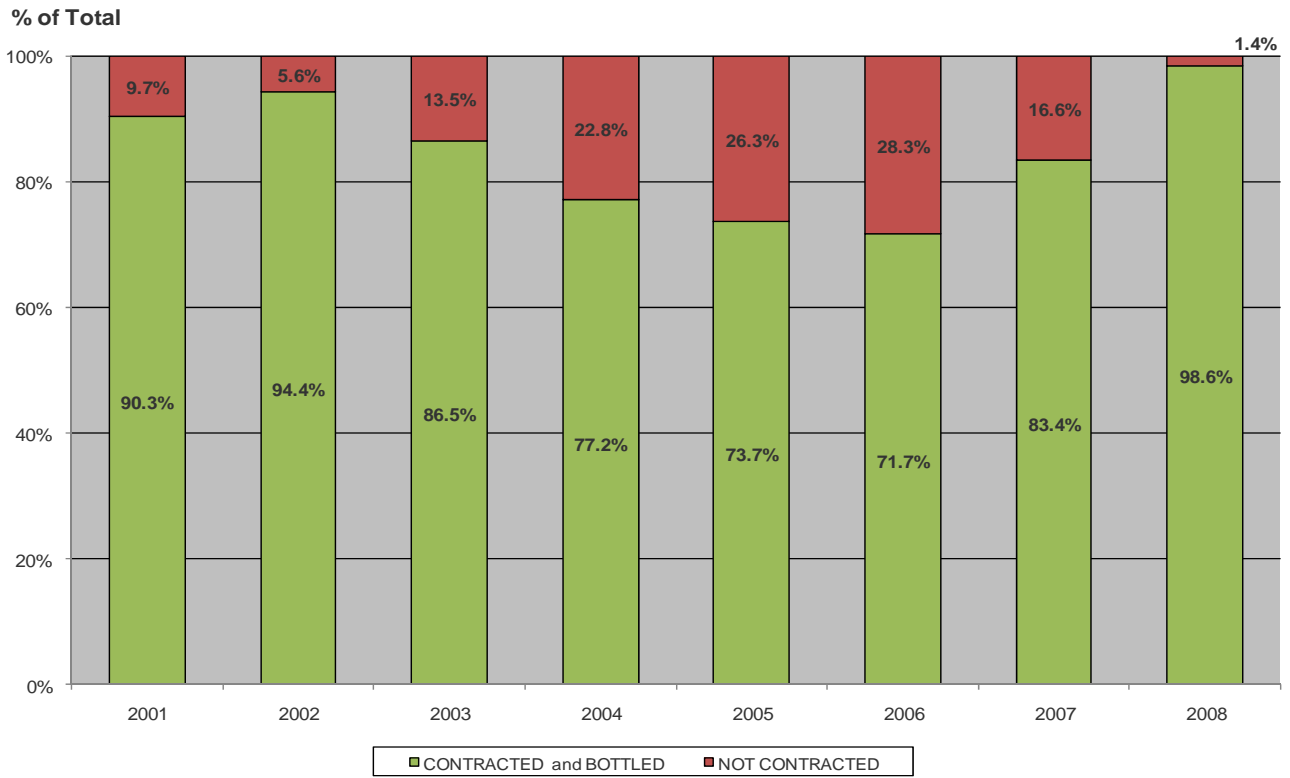


**GRAPH 7:**



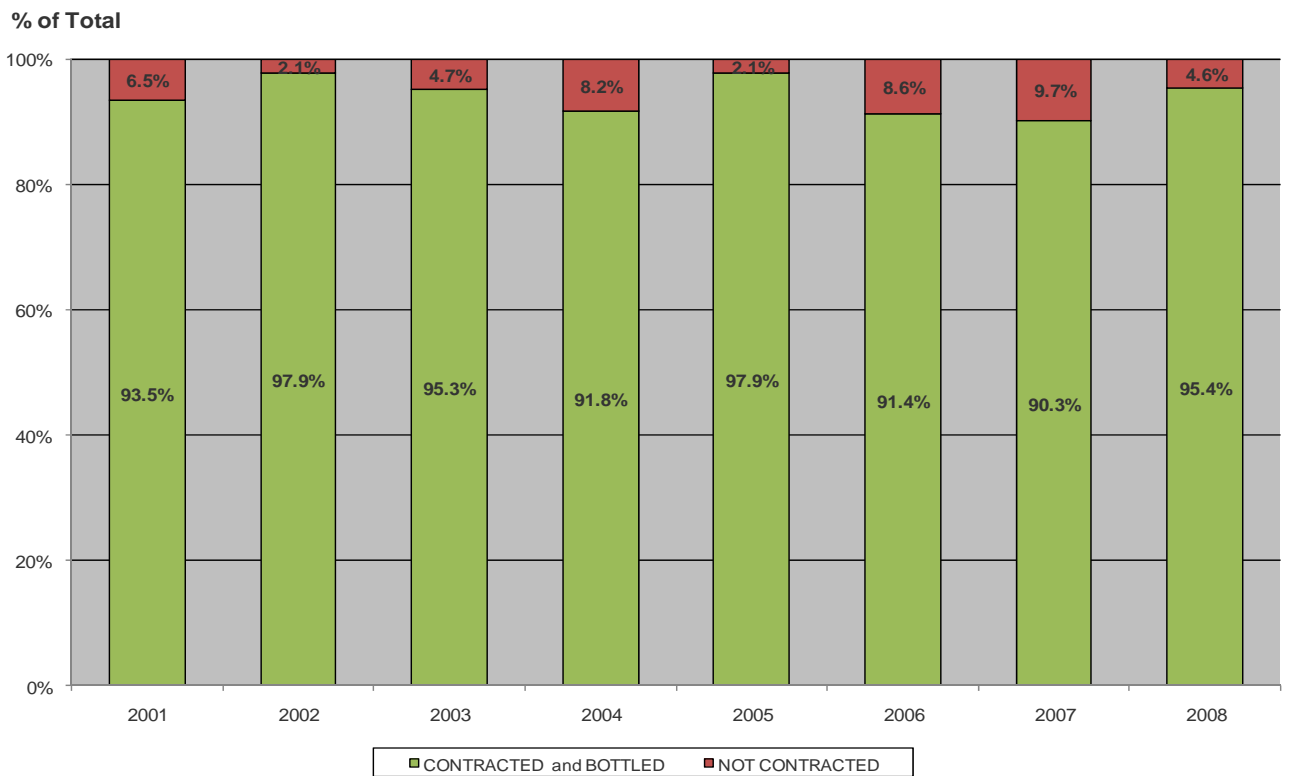
**GRAPH 8:**

**CONTRACTED AND BOTTLED VS NOT CONTRACTED NATURAL RED WINE**



**GRAPH 9:**

**CONTRACTED AND BOTTLED VS NOT CONTRACTED NATURAL WHITE WINE**

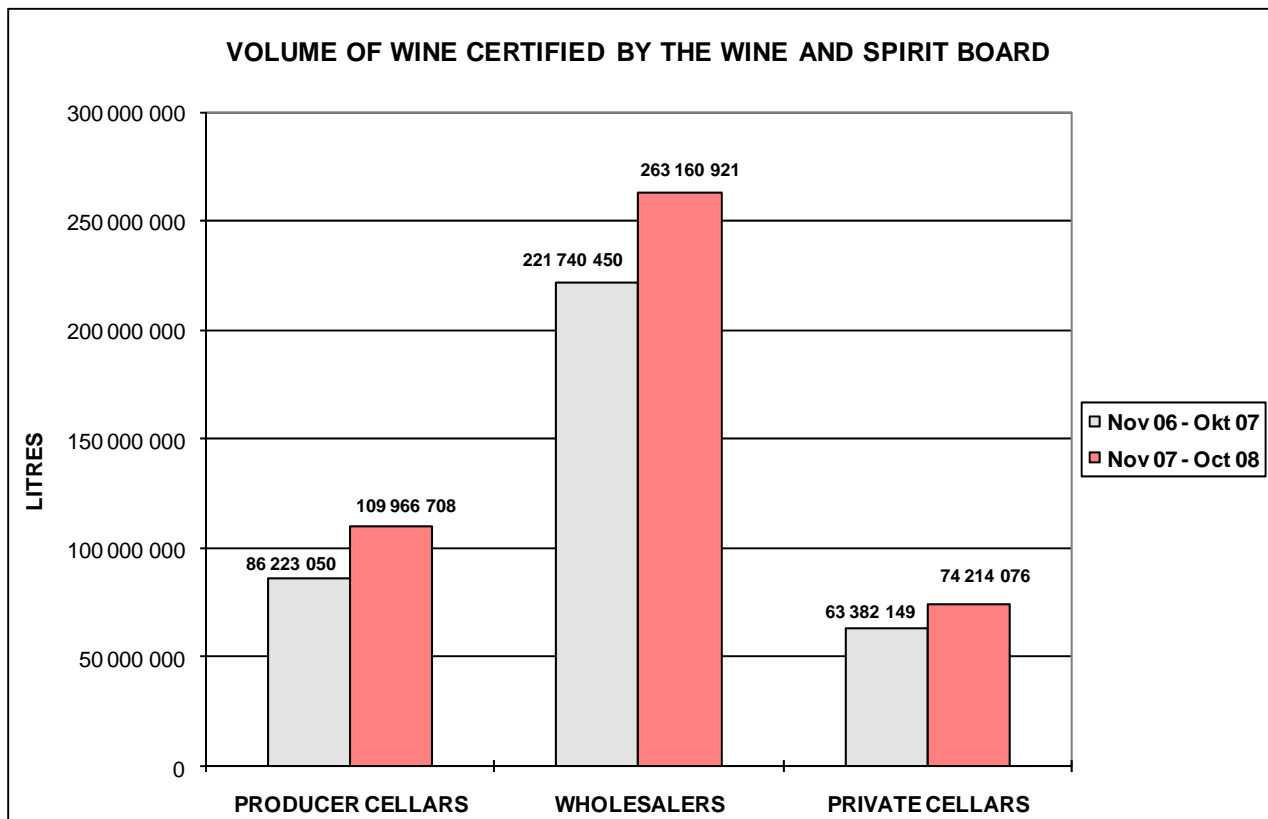


# VOLUME OF WINE CERTIFIED (LITRES)

|                         | 1 MONTH           |                   |            | 3 MONTHS           |                    |            | 6 MONTHS           |                    |            | 12 MONTHS          |                    |            |
|-------------------------|-------------------|-------------------|------------|--------------------|--------------------|------------|--------------------|--------------------|------------|--------------------|--------------------|------------|
|                         | Oct-07            | Oct-08            | TREND      | Aug-07<br>Oct-07   | Aug-08<br>Oct-08   | TREND      | May-08<br>Oct-07   | May-08<br>Oct-08   | TREND      | Nov-06<br>Oct-07   | Nov-07<br>Oct-08   | TREND      |
| <b>PRODUCER CELLARS</b> |                   |                   |            |                    |                    |            |                    |                    |            |                    |                    |            |
| Estate Wine             | 0                 | 0                 |            | 0                  | 0                  |            | 0                  | 0                  |            | 0                  | 0                  |            |
| Wine of Origin          | 6 609 939         | 6 252 141         | 95         | 16 836 564         | 16 827 141         | 100        | 31 510 896         | 34 576 168         | 110        | 53 003 313         | 70 146 442         | 132        |
| Geographical Unit Wine  | 4 007 270         | 4 482 166         | 112        | 9 330 810          | 14 605 268         | 157        | 19 279 795         | 24 170 793         | 125        | 33 219 737         | 39 820 266         | 120        |
| <b>SUB TOTAL</b>        | <b>10 617 209</b> | <b>10 734 307</b> | <b>101</b> | <b>26 167 374</b>  | <b>31 432 409</b>  | <b>120</b> | <b>50 790 691</b>  | <b>58 746 961</b>  | <b>116</b> | <b>86 223 050</b>  | <b>109 966 708</b> | <b>128</b> |
| <b>WHOLESALERS</b>      |                   |                   |            |                    |                    |            |                    |                    |            |                    |                    |            |
| Estate Wine             | 0                 | 0                 |            | 0                  | 0                  |            | 0                  | 0                  |            | 0                  | 0                  |            |
| Wine of Origin          | 2 533 812         | 4 368 779         | 172        | 8 989 359          | 14 137 134         | 157        | 17 302 643         | 27 866 740         | 161        | 30 966 132         | 46 064 184         | 149        |
| Geographical Unit Wine  | 19 430 747        | 23 335 318        | 120        | 52 029 781         | 63 826 829         | 123        | 105 482 608        | 127 462 287        | 121        | 190 774 318        | 217 096 737        | 114        |
| <b>SUB TOTAL</b>        | <b>21 964 559</b> | <b>27 704 097</b> | <b>126</b> | <b>61 019 140</b>  | <b>77 963 963</b>  | <b>128</b> | <b>122 785 251</b> | <b>155 329 027</b> | <b>127</b> | <b>221 740 450</b> | <b>263 160 921</b> | <b>119</b> |
| <b>PRIVATE CELLARS</b>  |                   |                   |            |                    |                    |            |                    |                    |            |                    |                    |            |
| Estate Wine             | 651 453           | 760 418           | 117        | 2 158 593          | 1 999 996          | 93         | 4 421 882          | 4 354 223          | 98         | 7 952 754          | 7 816 040          | 98         |
| Wine of Origin          | 4 224 564         | 3 770 650         | 89         | 11 439 713         | 11 129 463         | 97         | 20 847 043         | 21 688 445         | 104        | 36 921 997         | 38 473 997         | 104        |
| Geographical Unit Wine  | 2 312 187         | 3 028 768         | 131        | 5 762 472          | 8 177 523          | 142        | 10 867 899         | 16 163 352         | 149        | 18 507 398         | 27 924 039         | 151        |
| <b>SUB TOTAL</b>        | <b>7 188 204</b>  | <b>7 559 836</b>  | <b>105</b> | <b>19 360 778</b>  | <b>21 306 982</b>  | <b>110</b> | <b>36 136 824</b>  | <b>42 206 020</b>  | <b>117</b> | <b>63 382 149</b>  | <b>74 214 076</b>  | <b>117</b> |
| <b>TOTAL</b>            | <b>39 769 972</b> | <b>45 998 240</b> | <b>116</b> | <b>106 547 292</b> | <b>130 703 354</b> | <b>123</b> | <b>209 712 766</b> | <b>256 282 008</b> | <b>122</b> | <b>371 345 649</b> | <b>447 341 705</b> | <b>120</b> |

|                               | 1 MONTH    |            |       | 3 MONTHS         |                  |       | 6 MONTHS         |                  |       | 12 MONTHS        |                  |       |
|-------------------------------|------------|------------|-------|------------------|------------------|-------|------------------|------------------|-------|------------------|------------------|-------|
|                               | Oct-07     | Oct-08     | TREND | Aug-07<br>Oct-07 | Aug-08<br>Oct-08 | TREND | May-08<br>Oct-07 | May-08<br>Oct-08 | TREND | Nov-06<br>Oct-07 | Nov-07<br>Oct-08 | TREND |
| <b>CERTIFIED BULK EXPORTS</b> |            |            |       |                  |                  |       |                  |                  |       |                  |                  |       |
| (included in above figures)   | 14 452 777 | 16 720 082 | 116   | 37 740 637       | 49 823 098       | 132   | 73 698 235       | 95 342 908       | 129   | 125 776 957      | 168 605 645      | 134   |

\*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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 Diaan de Villiers - SALBA  
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Francois Malan - CEWPA  
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