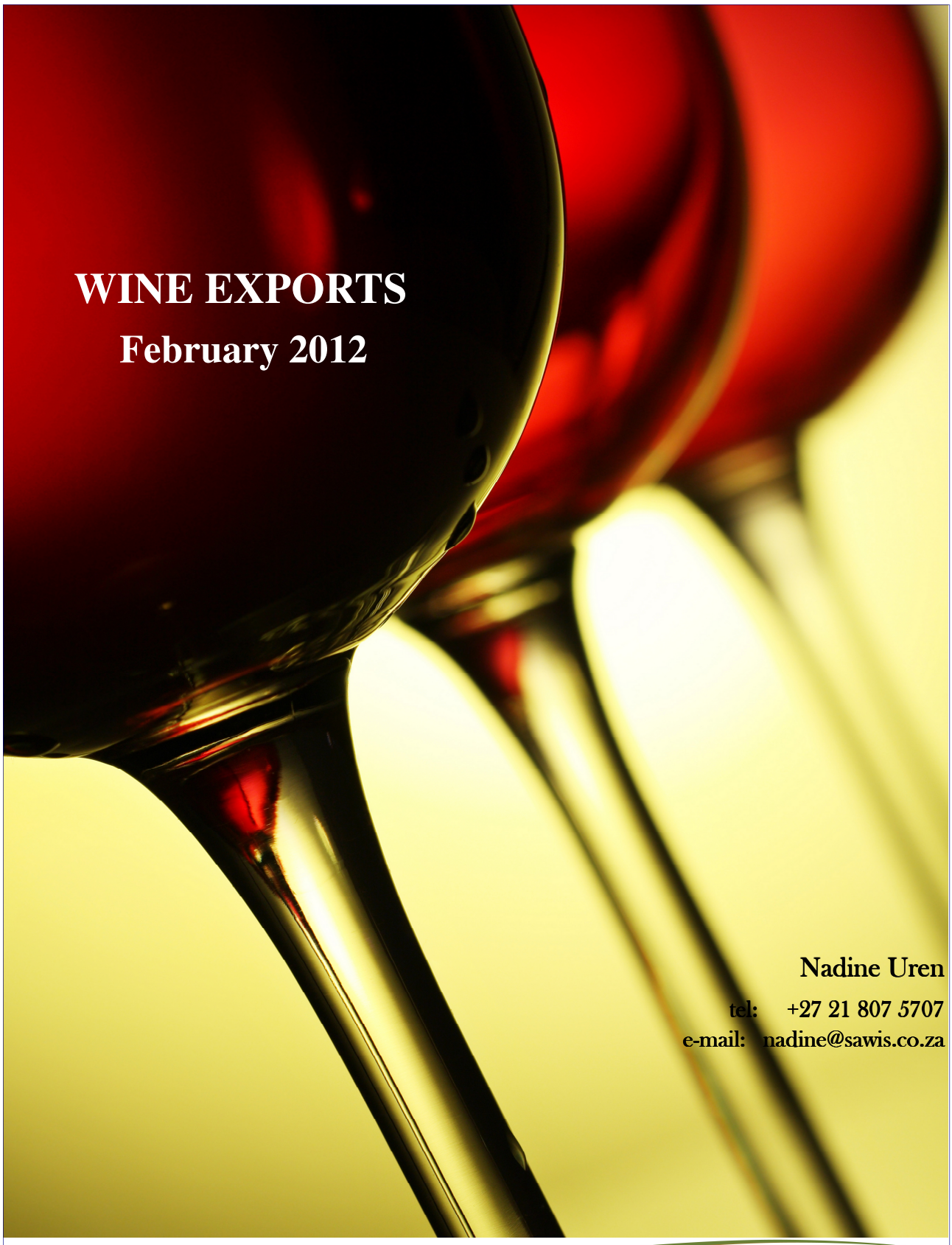


WINE EXPORTS

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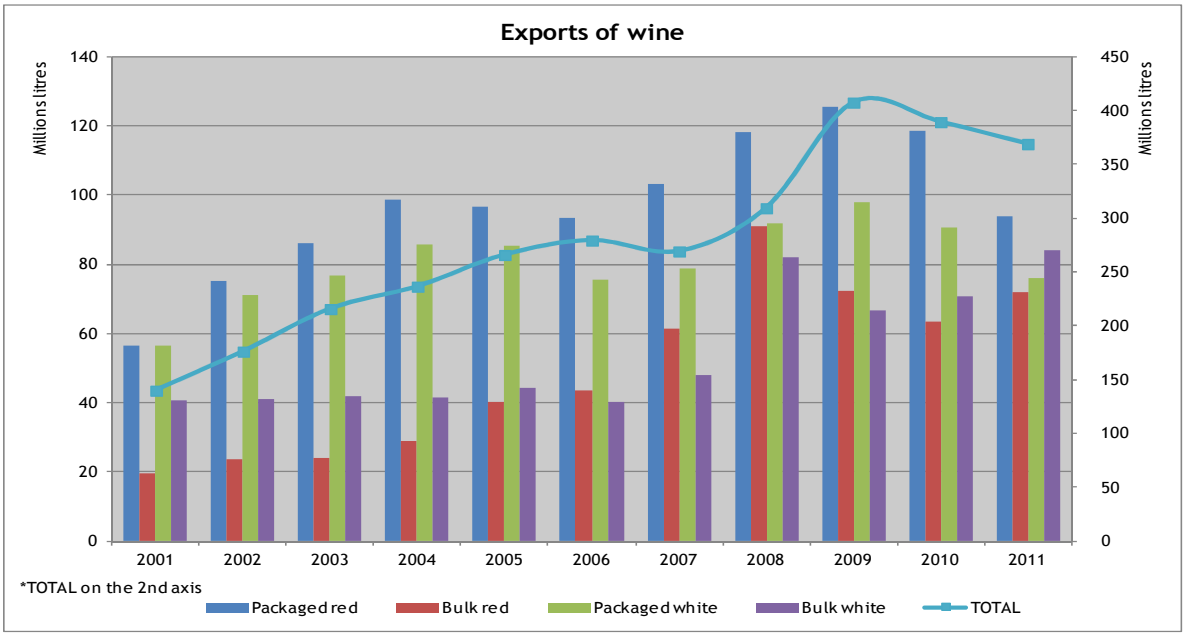
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SA WYNBEDRYF–INLIGTING & –STELSELS
SA WINE INDUSTRY INFORMATION & SYSTEMS

OVERVIEW OF WINE EXPORTS

HIGHLIGHTS

- Exports as a percentage of wine production decreased from 48.5% in 2010 to 43.2% in 2011.
- Packaged exports in 2011 represented 50.7% of natural wine exports compared to 60.0% in 2010 and 61.3% in 2009.
- Packaged natural wine exports for the period 2007 to 2011 has showed a significant decline of 6.7%. For the first time more bulk white wine than packaged white wine was exported during the 2011 period under review. Exports to various African countries and Asia showed a significant annual growth between 2007 and 2011.
- Overall bulk wine exports increased with 45% for the period 2007 to 2011. Bulk wine exports to Sweden, Thailand, Japan, Czech Republic and Russia showed a significant increase over this period.
- Wine exports in bulk by major New World wine-producing countries have over the last 10 years increased from approximately 20% to nearly 50% of all wine volumes traded. (Rabobank)
- SA exports of natural wine in bulk increased and exports of packaged wine decreased with 16.2% and 20% respectively in 2011. Total litres of wine exported decreased by 5.5% in 2011.
- South Africa represents 3.9% of world wine exports in 2011.



TOTAL QUANTITY OF WINE EXPORTED

Year	Natural wine	Fortified wine	Sparkling wine	Total litres	Trend	Exports as % of wine production
2000	139 800 022	471 513	685 237	140 956 772		26.1
2001	175 978 105	548 388	779 299	177 305 792	125.8	33.4
2002	215 511 730	520 936	1 360 842	217 393 508	122.6	38.3
2003	236 374 105	525 789	1 564 707	238 464 601	109.7	33.5
2004	265 761 884	413 393	1 552 885	267 728 162	112.3	38.4
2005	279 128 314	406 982	1 537 824	281 073 120	105.0	44.7
2006	269 166 506	486 547	2 018 235	271 671 288	96.7	38.3
2007	309 354 585	405 696	2 779 364	312 539 645	115.0	42.8
2008	407 319 613	423 207	3 952 009	411 694 829	131.7	53.9
2009	389 102 808	282 636	6 206 991	395 592 435	96.1	49.1
2010	370 973 344	401 700	7 174 873	378 549 917	95.7	48.5
2011	350 449 351	348 859	6 649 736	357 447 946	94.4	43.2

Fortified wine, sparkling wine and natural wine decreased by 13.1%, 7.3% and 5.5% respectively.

3L BAG-IN-BOX

TOP 10 COUNTRIES

COUNTRY	2007	2008	2009	2010	2011
Sweden	19 616 796	21 749 016	25 291 440	24 343 734	19 021 452
UK	9 729 501	14 739 819	12 791 316	10 699 935	6 123 879
Denmark	3 227 640	3 809 775	3 322 800	3 331 509	2 927 688
Finland	1 266 624	2 434 218	2 428 284	2 506 377	2 502 354
Norway	824 868	911 898	1 154 904	1 084 416	1 296 084
Germany	90 858	306 492	221 472	579 612	375 936
Estonia	59 760	125 964	250 008	247 479	303 762
Iceland	235 536	255 828	325 476	287 592	284 868
Netherlands	695 316	413 148	330 264	212 592	279 324
France	8 100	42 516	90 696	140 400	239 616
Rest of the world	817 425	1 215 669	1 557 771	1 811 394	1 579 692

Sweden remains the biggest export market for 3 litre bag-in-box with a volume of 19 021 452 litres, although with a significant decline since 2010. Exports to countries like Norway, Estonia, the Netherlands and France showed a slight increase in volume.

TOP 20 COUNTRIES - 750 ML BOTTLES

COUNTRY	2007	2008	2009	2010	2011
UK	54 528 892	69 089 591	80 884 402	54 777 503	32 373 602
Netherlands	17 776 082	20 272 445	19 871 966	19 321 508	17 384 674
Germany	14 558 783	14 724 137	14 720 225	16 453 936	16 021 595
USA	9 456 968	8 291 052	8 156 255	9 457 337	8 587 587
Sweden	5 916 882	5 623 835	7 012 778	7 169 460	6 678 635
Canada	6 354 960	6 644 119	7 427 859	7 652 401	6 457 664
Belgium	4 357 382	4 322 354	4 061 223	4 680 083	4 550 919
China	601 625	842 857	1 329 678	2 288 455	4 283 431
Denmark	6 535 060	7 767 675	7 295 639	7 826 915	4 238 735
Nigeria	1 206 782	2 094 300	2 224 778	3 040 016	3 436 637
Republic of Ireland	4 354 727	4 015 652	2 902 750	3 177 900	2 151 172
Finland	1 967 144	2 087 033	1 984 014	2 271 960	1 953 090
Japan	1 216 202	1 466 992	2 336 948	2 519 189	1 560 825
Australia	648 716	2 337 345	1 470 816	1 562 106	1 322 463
Russia	1 434 503	1 118 907	1 010 813	1 245 384	1 292 626
United Arab Emirates	523 445	794 119	669 686	1 126 910	1 192 820
New Zealand	604 467	2 399 801	1 581 548	1 752 890	1 166 022
Tanzania	673 751	701 267	659 704	877 241	1 087 146
Kenya	611 330	502 610	449 733	863 777	996 795
Poland	816 570	822 921	680 323	828 386	850 172

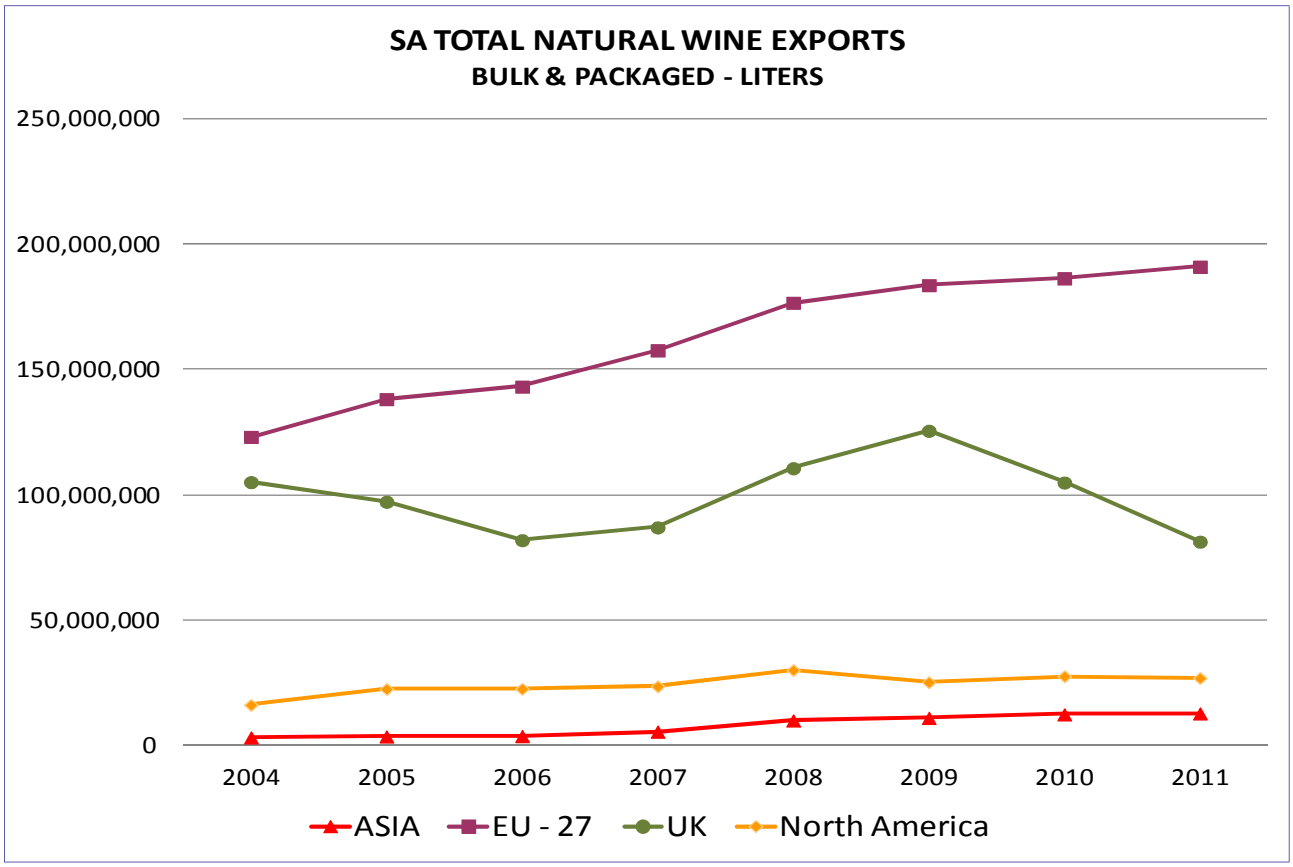
Exports of packaged wine in 750 ml bottles to the UK decreased since 2010, but the UK remains the biggest export market with a volume of 32 373 602 litres, followed by the Netherlands with a volume of 17 384 674 litres and Germany with 16 021 595 litres.

750ML GLASS EXPORTS: AFRICA

TOP 10 COUNTRIES

COUNTRY	2007	2008	2009	2010	2011
Nigeria	1 206 782	2 094 300	2 224 778	3 040 016	3 436 637
Tanzania	673 751	701 267	659 704	877 241	1 087 146
Kenya	611 330	502 610	449 733	863 777	996 795
Angola	270 927	1 162 124	1 451 529	1 440 347	781 176
Zimbabwe	141 572	182 996	318 982	551 112	602 672
Ghana	302 135	313 346	274 771	502 049	404 306
Uganda	164 318	181 293	187 736	241 654	224 013
Congo	40 833	75 722	128 087	153 113	161 708
Zambia	192 749	78 728	490 496	339 329	154 341
Mozambique	23 099	57 830	107 069	49 676	135 630

Packaged wine exported to Nigeria in 2011 increased with 13%, slightly lower than 2010. Nigeria is the biggest market in Africa for 750 ml wine exported from South Africa followed by Tanzania. Angola has showed a significant decline of 45.7%.



Wine exports to UK has shown a significant decrease of 22.4%. Asia has shown an increase of 2.8%.

TOP 50 COUNTRIES: EXPORTS OF NATURAL WINE - PACKAGED

COUNTRY	2007	2008	2009	2010	2011	Total 2007 to 2011	Average growth per year 2007 to 2011
UK	65 832 338	86 063 124	95 367 006	67 131 229	39 355 259	353 748 956	-12%
Sweden	25 919 814	27 782 239	32 672 808	31 957 696	26 140 399	144 472 956	0%
Netherlands	18 708 696	20 832 989	20 512 993	19 971 557	18 167 673	98 193 908	-1%
Germany	15 327 456	15 592 388	15 482 439	17 490 718	16 775 332	80 668 333	2%
U.S.A.	9 598 050	8 472 513	8 494 253	9 969 575	9 079 924	45 614 315	-1%
Canada	7 209 630	7 608 647	8 468 761	8 737 083	7 465 350	39 489 471	1%
Denmark	9 822 411	11 740 626	11 199 143	11 433 327	7 258 048	51 453 555	-7%
Belgium	4 870 468	4 806 221	4 573 361	5 149 282	4 881 422	24 280 754	0%
Finland	3 346 642	4 833 200	5 076 555	5 373 543	4 812 607	23 442 547	10%
China	738 580	949 714	1 438 528	2 523 040	4 406 002	10 055 864	56%
Kenya	2 187 420	1 777 183	1 733 805	3 187 143	3 757 560	12 643 111	14%
Nigeria	1 231 395	2 172 938	2 438 853	3 159 278	3 627 657	12 630 121	31%
United Arab Emirates	899 838	1 468 257	1 603 824	2 466 602	2 544 814	8 983 335	30%
Republic of Ireland	4 722 994	4 267 383	3 046 417	3 298 177	2 222 035	17 557 006	-17%
Japan	1 245 592	1 543 538	2 562 927	2 853 038	1 866 764	10 071 859	11%
Norway	1 287 403	1 496 276	1 707 203	1 685 813	1 701 180	7 877 875	7%
Tanzania	1 301 082	1 238 752	1 177 034	1 433 235	1 624 434	6 774 537	6%
Russia	1 542 063	1 254 372	1 108 235	1 386 698	1 506 415	6 797 783	-1%
Australia	648 725	2 337 417	1 471 255	1 566 045	1 323 156	7 346 598	20%
New Zealand	642 927	2 780 394	1 774 193	1 976 620	1 312 607	8 486 741	20%
Zimbabwe	201 917	261 948	490 715	1 006 262	1 129 376	3 090 218	54%
Angola	363 347	1 421 036	1 874 554	1 834 103	1 103 052	6 596 092	32%
France	517 198	856 655	742 887	1 161 106	1 072 733	4 350 579	20%
Poland	842 126	827 925	680 737	828 443	850 595	4 029 826	0%
Switzerland	1 523 073	829 803	1 066 675	1 110 328	759 974	5 289 853	-16%
Brazil	453 438	367 245	469 817	978 024	642 901	2 911 425	9%
Estonia	384 435	507 501	572 069	708 765	635 415	2 808 185	13%
Mauritius	558 292	589 633	564 148	613 195	634 755	2 960 023	3%
Uganda	384 517	399 630	514 972	662 070	631 329	2 592 518	13%
Hong Kong	370 775	452 461	553 379	591 617	627 408	2 595 640	14%
Seychelle Islands	256 368	329 835	416 773	869 407	558 165	2 430 548	21%
Singapore	408 951	572 155	568 139	524 799	536 377	2 610 421	7%
Ghana	426 314	340 806	330 082	606 945	485 444	2 189 591	3%
Austria	235 989	276 039	334 770	335 759	409 523	1 592 080	15%
Iceland	286 060	307 037	449 926	368 114	383 967	1 795 104	8%
Czech Republic	250 525	289 468	141 833	283 897	331 334	1 297 057	7%
Latvia	755 750	463 406	299 039	348 957	318 516	2 185 668	-19%
Ethiopia	277 139	222 193	307 876	221 062	312 433	1 340 703	3%
Qatar	197 112	145 489	236 879	243 943	312 152	1 135 575	12%
Madagascar	360 211	306 082	176 093	267 795	306 289	1 416 470	-4%
Reunion Island	315 831	334 316	465 840	450 677	294 560	1 861 224	56%
Thailand	226 131	295 346	264 234	266 469	290 721	1 342 901	6%
Taiwan	254 458	220 368	119 414	217 034	289 825	1 101 099	3%
Zambia	356 065	101 039	963 001	552 179	273 798	2 246 082	-6%
Bahrain	178 117	244 681	265 316	215 134	265 451	1 168 699	10%
Malaysia	292 145	159 590	195 576	249 575	252 569	1 149 455	-4%
Maldives	109 932	162 372	157 633	214 728	227 634	872 299	20%
Turkey	58 069	101 369	60 584	144 811	218 415	583 248	39%
Congo	54 258	86 257	157 835	203 579	209 456	711 385	40%
South Korea	339 365	295 476	321 057	302 013	197 496	1 455 407	-13%
Rest of the world	2 242 768	2 606 846	2 901 538	3 175 797	3 437 627	14 364 576	11%
Total	190 564 200	223 392 178	238 572 984	222 306 286	177 827 928	1 052 663 576	-2%

Packaged exports to China increased with 74.6% in 2011.

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COUNTRIES - EXPORTS OF NATURAL WINE - BULK

COUNTRY	2007	2008	2009	2010	2011	Total 2007 to 2011	Average growth per year 2007 to 2011
Germany	44 214 100	51 764 395	55 351 829	54 811 939	63 389 873	269 532 136	9%
UK	21 196 306	24 565 807	30 194 418	37 785 571	42 001 377	155 743 479	19%
Sweden	48 120	1 008 710	5 047 435	6 319 211	10 609 157	23 032 633	285%
Denmark	3 541 951	3 935 227	4 961 991	5 900 100	10 507 970	28 847 239	31%
France	6 427 849	7 566 206	7 928 484	6 607 564	8 265 912	36 796 015	6%
Russia	1 002 353	17 091 075	5 903 591	6 461 002	6 847 278	37 305 299	62%
The Netherlands	10 317 750	8 438 785	7 091 858	6 868 519	6 696 505	39 413 417	-10%
Canada	5 775 002	5 954 901	3 090 831	5 300 962	6 670 158	26 791 854	4%
Belgium	4 702 458	3 947 447	4 260 301	4 374 757	4 423 529	21 708 492	-2%
U.S.A	1 061 038	8 152 292	5 226 362	3 658 030	3 774 671	21 872 393	37%
Switzerland	2 902 881	4 434 806	3 182 737	2 505 081	2 280 412	15 305 917	-6%
Thailand	196 008	432 920	1 426 300	1 747 640	1 943 920	5 746 788	77%
Czech Republic	168 739	1 765 787	813 370	767 850	982 803	4 498 549	55%
China	511 240	3 382 944	2 619 826	1 832 064	888 255	9 234 329	15%
Japan	109 200	240 120	255 840	573 660	837 720	2 016 540	66%
Mauritius	519 162	637 225	316 800	776 550	567 212	2 816 949	2%
Estonia	0	0	0	0	409 834	409 834	
Finland	709 350	953 620	677 600	442 970	407 460	3 191 000	-13%
Romania	0	1 415 510	0	237 860	237 660	1 891 030	
Poland	167 501	215 128	214 875	239 881	167 462	1 004 847	0%
Republic of Ireland	0	1 177 725	0	503 134	155 660	1 836 519	
Italy	1 035 911	505 850	1 292 472	199 270	125 090	3 158 593	-41%
Norway	314 794	285 496	286 980	142 420	120 580	1 150 270	-21%
Bulgaria	0	48 620	0	0	71 780	120 400	
Burma	0	0	23 620	23 880	63 520	111 020	
Reunion Island	0	0	0	0	59 900	59 900	
Republic of Belarus	0	143 389	119 298	0	48 080	310 767	
India	408 180	572 300	0	0	24 000	1 004 480	-51%
Zimbabwe	32 000	32 000	0	0	23 660	87 660	-7%
The Seychelle Islands	0	0	0	20 000	20 000	40 000	
Angola	8 181 616	23 130 085	4 285 300	492 984	0	36 089 985	-100%
Australia	95 883	3 276 844	0	0	0	3 372 727	-100%
Austria	98	24 000	0	0	0	24 098	-100%
Slovak Republic	0	23 767	0	0	0	23 767	
Hong Kong	0	47 990	0	0	0	47 990	
Kenya	0	20 820	0	24 000	0	44 820	
Mozambique	24 320	132 900	130 283	0	0	287 503	-100%
New Zealand	5 126 600	8 108 200	5 348 540	0	0	18 583 340	-100%
Taiwan	0	0	23 760	24 000	0	47 760	
Vietnam	0	226 916	216 085	0	0	443 001	
British Virgin Islands	0	0	0	0	0	0	
Senegal	0	267 660	238 560	0	0	506 220	
Total	118 790 410	183 927 467	150 529 346	148 640 899	172 621 438	774 509 560	10%

Germany remains South Africa's biggest bulk wine export country with a volume of 63 389 873 litres, an increase of 15.6% in 2011.

EXPORTS OF NATURAL WINE PER VARIETY / TYPE - PACKAGED

Variety/Type	2007	2008	2009	2010	2011	Average growth per year 2007 to 2011
	Litres					
Chardonnay	16 631 716	17 318 175	17 220 159	14 827 515	11 276 208	-9.3%
Sauvignon blanc	13 248 406	15 736 164	17 116 976	17 104 741	16 334 500	5.4%
Chenin blanc	16 964 457	18 542 585	19 138 768	18 693 288	16 231 276	-1.1%
Other White	32 019 339	40 075 169	44 431 496	39 911 243	32 159 453	0.1%
Blanc de Noir and Rosé	8 739 321	13 603 477	15 406 450	13 343 181	8 096 273	-1.9%
Cabernet Sauvignon	13 329 552	14 214 652	15 466 397	14 710 724	12 062 531	-2.5%
Shiraz	14 794 217	17 857 101	17 968 215	15 389 875	12 545 840	-4.0%
Pinotage	8 666 346	9 616 043	9 853 129	9 021 817	8 294 475	-1.1%
Merlot	6 989 509	8 531 598	9 181 808	9 521 363	6 273 253	-2.7%
Other Red	59 181 325	67 897 199	72 790 063	69 808 698	54 554 103	-2.0%
Total	**190 564 188**	**223 392 163**	**238 573 461**	**222 332 445**	**177 827 912**	**-1.7%**

In line with world trends, South Africa's strongest growth has been in Sauvignon blanc with an average growth of 5.4% per year for period 2007 - 2011.

EXPORTS OF NATURAL WINE PER VARIETY / TYPE - BULK

Variety/Type	2007	2008	2009	2010	2011	Average growth per year 2007 to 2011
	Litres					
Chardonnay	4 385 051	12 286 733	9 200 511	8 681 086	8 705 768	18.7%
Sauvignon blanc	2 981 469	4 157 748	2 585 926	4 610 663	8 988 725	31.8%
Chenin blanc	22 330 066	24 540 187	21 949 183	27 562 503	30 364 243	8.0%
Other White	18 275 537	40 900 447	32 890 620	29 658 367	35 894 510	18.4%
Blanc de Noir and Rosé	9 649 282	10 893 197	11 492 144	12 657 825	13 154 345	8.1%
Cabernet Sauvignon	6 001 794	7 334 053	4 844 124	5 309 867	5 343 684	-2.9%
Shiraz	2 042 376	3 499 330	3 504 842	3 428 003	4 281 143	20.3%
Pinotage	8 537 162	7 988 903	8 600 921	5 784 561	7 562 653	-3.0%
Merlot	2 120 188	2 609 460	2 546 054	2 082 310	3 496 809	13.3%
Other Red	42 467 485	69 717 409	52 915 021	48 865 714	54 829 558	6.6%
Total	118 790 410	183 927 467	150 529 346	148 640 899	172 621 438	9.8%

EXPORTS OF NATURAL WINE PER VARIETY / TYPE - TOTAL

Variety/Type	2007	2008	2009	2010	2011	Average growth per year 2007 to 2011
	Litres					
Chardonnay	21 016 767	29 604 908	26 420 670	23 508 601	19 981 976	-1.3%
Sauvignon blanc	16 229 875	19 893 912	19 702 902	21 715 404	25 323 225	11.8%
Chenin blanc	39 294 523	43 082 772	41 087 951	46 255 791	46 595 519	4.4%
Other White	50 294 876	80 975 616	77 322 116	69 569 610	68 053 963	7.9%
Blanc de Noir en Rosé	18 388 603	24 496 674	26 898 594	26 001 006	21 250 618	3.7%
Carbernet Sauvignon	19 331 346	21 548 705	20 310 521	20 020 591	17 406 215	-2.6%
Shiraz	16 836 593	21 356 431	21 473 057	18 817 878	16 826 983	0.0%
Pinotage	17 203 508	17 604 946	18 454 050	14 806 378	15 857 128	-2.0%
Merlot	9 109 697	11 141 058	11 727 862	11 603 673	9 770 062	1.8%
Other Red	101 648 810	137 614 608	125 705 084	118 674 412	109 383 661	1.9%
Total	**309 354 598**	**407 319 630**	**389 102 807**	**370 973 344**	**350 449 350**	3.2%

