HARVEST REPORT 2010

Tricky in the vineyard, great in the cellar

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I. GENERAL OVERVIEW

What an intense year! It was extremely difficult to make predictions due to the constant fluctuations in weather conditions, with unrelenting winds prevailing almost throughout. Initially matters were quite advanced, with early bud burst, then cold weather in October and November delayed everything, and subsequently favourable conditions and the small size of the crop tended to move D-day forward again. Production cost was high from the start and expenses per ton skyrocketed because of the decline in yield.

Crop size The 2010 wine grape harvest is estimated at 1 231 405 tons (30 April 2010), which represents a decrease of 8.6% or 116 216 tons compared to the 2009 crop. All regions except Orange River had a decrease in year-on-year production trends.

The 2010 wine grape harvest, which includes juice and concentrate for non-alcoholic purposes, wine for brandy and distilling wine, is expected to amount to 939.6 million litres at an average recovery of 763 litres per ton of grapes.

2009 growing season Cool, overcast and rainy weather conditions during the induction period in October/November 2008 had an adverse effect on bunch initiation for the 2010 harvest and impacted on this year's crop.

Although sufficient winter cold prevailed, the cool, wet spring caused uneven budding in many regions. The season was characterised by unrelenting strong winds. The summer months were exceptionally dry and windy. Sunburn, wind and heat damage combined with a deficiency in irrigation water in some regions and downy mildew resulted in crop losses.

The harvest The overall cool climate during the first part of ripening was beneficial to flavour retention in cultivars such as Sauvignon blanc. February and March experienced the usual sporadic heat waves. The heat wave at the beginning of March 2010 which lasted longer than a week will certainly go down in the annals.

Due to the smaller crop most blocks could be picked at optimal ripeness. The decrease in volumes also meant that cellar space was often not a problem, and winemakers could allow prolonged skin contact.

The wines Winemakers and viticulturists are more than satisfied with the quality of the grapes that were harvested. Grapes were healthy with good flavours and analyses. Bunches were generally looser than normal and berries smaller, with an excellent fruit to skin ratio resulting in intense colour in the red wines.

Breedekloof Grapes were healthy and showed signs of physiological ripeness at lower sugar content. The harvest here was much earlier than usual.

Klein Karoo Almost all red cultivars fared extremely well with grape quality already evident in the vineyard.

Olifants River Until the last week of February weather conditions were absolutely ideal for even ripening of grapes. Quality wise this was one of the better vintages.

Orange River Producers are grateful for a healthy and blessed 2010 vintage season, when Orange River Wine Cellar produced the most natural wine in the 40 year history of the cellar.

Paarl One of the most difficult seasons in a very long time. Crop losses occurred due to downy mildew and exceptionally strong prevailing winds which damaged flower clusters and fruit set. Wine quality nevertheless appears to be of a very high standard.

Robertson The summer months were exceptionally dry and some producers had to stop irrigating early in January because water reserves were depleted. Smaller crop, but very healthy grapes.

Stellenbosch The colour of the red cultivars is particularly intense and considered to be even better than the previous season. Early and late cultivars ripened early, which put pressure on the processing facilities.

Swartland / Malmesbury The old adage that a light wheat crop precedes a light grape crop, appears to hold true for the 2010 harvest. Grape analyses were generally good and practically all the white grapes were crushed before the March heat wave.

Worcester The smaller crop once again proved that yield is directly related to quality. Excellent wines were made from Chenin blanc in particular and the red wines this year display exceptional colour due to the smaller berries.

Coastal Region In Cape Point, Constantia, Darling and Durbanville cooler conditions resulted in wines with good fruit and great body. Winemakers enthuse about phenolic ripeness, finesse and structure.

Overberg, Walker Bay and Cape Agulhas Vastly lower yields in Elgin, Bot River, Hemel-en-Aarde and Elim, due to an unusually cool and wet spring with strong winds during flowering which damaged canopy and fruit. Quality compensates for quantity.

II. MOST IMPORTANT WINE REGIONS

BREEDEKLOOF

The total crop for the Breedekloof district amounted to 199 913 tons. The 2010 crop is 10% smaller than the 2009 crop and started approximately 10 days earlier.

The decrease can be ascribed mainly to wet, cold and windy conditions during the flowering period, especially in early flowering cultivars. Downy mildew infections during this period caused further crop losses. Unrelenting, strong winds in spring created conditions that were not conducive to berry development.

Climate and viticultural trends

The post-harvest period of 2009 was characterised by late leaf fall and short warm periods. May especially was relatively hot and dry. In general good accumulation of reserves took place and shoots were properly ripened throughout. Good snowfall from June onwards supplemented water in the dams and caused cold night and day temperatures. Cold night temperatures in July especially were beneficial to dormancy breaking. May had 46 mm rain, June 199 mm and July 93 mm.

Average winter rainfall properly supplemented most soils and irrigation dams before bud burst. Initially vines showed vigorous growth. August to October 2009 were characterised by the usual wet, but slightly warmer weather conditions. Night temperatures were approximately 2ºC and day temperatures 1.8ºC higher than the long-term averages. These warmer conditions were probably responsible for uneven budding in places.

Elsewhere in the region vigorous growth and regular showers, in October especially, as well as 73mm mid-November, combined with slightly warmer temperatures, also caused downy mildew. Despite good control flower clusters suffered. This could have played a significant role in the smaller yield. On the whole the canopies were nevertheless healthy.

November and December saw mild day temperatures and cool nights, but during the last week of November the day temperatures started heating up. December and January were

dry and windy months which received hardly any showers. On 5 and 13 January when the mercury shot up, water demands increased dramatically, which necessitated good irrigation scheduling. Cool nights prevailed.

Due to the low rainfall during this period, the vines were very healthy, with isolated instances of new downy mildew and oidium infections from November to January. Sporadic heat wave conditions were encountered on 8 and 9 February as well as at the end of February and during the first week of March. The harvest was seven to 10 days earlier than in 2009.

Grape and wine quality

The generally cool climate during the first part of ripening benefited flavour retention in cultivars such as Sauvignon blanc. Grapes that ripened early showed very good analyses and made promising wines. Physiological ripeness occurred at lower sugar content.

In instances where vines were bearing heavily, acerbated by heat wave conditions, some cultivars did not ripen optimally, Shiraz and Cabernet Sauvignon especially. Some vines struggled to achieve the desired sugar content. Shrivelling and weak colour occurred in Shiraz.

Incidence of botrytis was minimal and hardly impacted on the quality of the grapes.

KLEIN KAROO

Production trends

The 2010 crop amounted to 34 931 tons which is 20% less than the 2009 crop. White cultivars were most affected, namely Colombar, Chardonnay, Muscadel and Muscat d' Alexandrie (Hanepoot).

Cold and wet conditions during the induction period in November 2008 impacted on this year's crop. During the first half of November 2008 three to five days had maximum temperatures below 20°C. This crucial stage was moreover adversely affected by 50 to 70 mm rain and dense cloud cover.

More cold and wet weather conditions during flowering (November 2009), combined with downy mildew infections, also resulted in a smaller crop.

Climate and viticultural trends

The post-harvest period was auspicious with widespread rain in the second half of April 2009. Right from the start winter was colder than usual and provided sufficient cold for complete dormancy breaking. Winter and early spring were exceptionally dry. Although regular showers occurred, quantities were never sufficient to fill the dams. At the beginning of spring the water resources were still insufficient and some producers had to pump subterranean water for irrigation at a high cost.

The warm weather of the second half of winter stimulated sap flow and bud burst in early cultivars was 14 days earlier. The initial warm weather was followed by cold weather, which delayed further budding and growth. Bud burst in late cultivars therefore occurred at the usual time. Cold and wet weather from mid-October – approximately 100 mm widespread rain during the second week of October – to mid-November restricted growth and caused weak berry set. Conditions favoured downy mildew, a disease that hardly occurs in this dry region, with some losses in Chardonnay, Muscat d' Alexandrie (Hanepoot) and Muscadel. Apart from downy mildew, there were no diseases worth mentioning nor damage to grapes. Grape quality was therefore exceptionally good.

The early part of summer was very cool, with temperatures warming in January but the dry weather continued, bringing with it flocks of birds threatening to eat the grapes due to the lack of food.

Cold and wet conditions during the induction period in November 2008 had a significant impact on the crop. During the first half of November 2008 there were 3 to 5 days with

maximum temperatures below 20°C. This critical stage was also influenced by 50 to 70 mm rain and dense cloud cover.

The changeable weather conditions made it very difficult to predict the time of harvest. Initially everything was early with early bud burst, then later with cold in October and November, and then earlier with favourable conditions in December and January.

Grape and wine quality

The harvest commenced at the usual time or slightly later. Late cultivars ripened earlier due to favourable weather conditions and a smaller crop. Excellent quality grapes were delivered until early March. The lion's share of the grapes had been crushed when heat wave conditions struck from 28 February to 8 March followed by rain from 7 to 12 March.

Almost all red cultivars fared extremely well with grape quality already visible in the vineyard. There were no diseases which could impact on wine quality. The decrease in volumes also meant that cellar space was often not a problem, and winemakers could allow prolonged skin contact.

The harvest produced good overall quality with exceptional red wines. Production cost was high, however, and increased even further as a result of the low yield, which was detrimental to producers and also increased cellar cost per ton. An increase in the wholesale price of wine is therefore necessary to support the wine industry.

OLIFANTS RIVER

Production trends

Although some individual producers harvested much smaller crops, the total crop in the region is 199 442 tons, 6% smaller than 2009. The biggest decreases were probably in Muscat d' Alexandrie (Hanepoot), as a result of downy mildew, followed by Sauvignon blanc and Chardonnay. Colombar, one of the valley's mainstays, was more or less constant or slightly higher. Pinotage crops were considerably smaller due to climatic conditions.

Climate and viticultural trends

Sufficient winter cold translated into good bud burst, followed by temperatures that ensured even ripening. With no abnormal weather incidents such as gale force winds or heat waves occurring from budding to mid-February, conditions during flowering and fruit set were impeccable. Floods experienced during the flowering period of Muscat d' Alexandrie (Hanepoot) adversely affected low-lying blocks. Some blocks were so wet that producers could not spray against downy mildew. Late season saw incidences of mealy bug infestations and oidium.

Until the last week of February weather conditions were absolutely ideal for even ripening of grapes, which is essential for the development and retention of grape flavours and sugars.

Grape and wine quality

A large percentage of the white grapes, which are more susceptible to excessively high temperatures, had been crushed when the mercury shot up at the end of February and beginning of March. Sugars increased rapidly and the cellars were under pressure to receive the grapes as quickly as possible. Thanks to excellent co-operation from producers all the cellars succeeded in doing so.

Quality-wise this was one of the better harvests. The cool ripening period of the white grapes in promises very good quality, in Sauvignon blanc and Chardonnay in particular, both of which were crushed early in the season. The low yields of Pinotage should produce good quality and Shiraz, which was less susceptible to berry shrivelling during ripening, should produce good quality.

ORANGE RIVER

Production trends

The 165 434 tons 2010 crop was 43% bigger than the 2009 crop. Reasons for the increase are higher yields across all wine grape cultivars, except for Muscat d' Alexandrie (Hanepoot), as well as Sultana and Merbein, both of which were used mainly for raisins, and table grape cultivars that were used for juice production. Average yields of Chenin blanc and Colombar increased by 30-35%. The Muscat d' Alexandrie (Hanepoot) yield decreased by 7%. The crop could well have been bigger, were it not for losses incurred by widespread hail damage in December and January.

Climate and viticultural trends

Bud burst occurred early in September 2009, but night temperatures remained constantly low. Budding was more even with a better budding percentage than last year. Fluctuations between day and night temperatures resulted in an uneven growth pattern in most cultivars; even so, fruit set was good almost across the board. There was some frost damage to Sultana especially, but it had no significant impact on the crop. Likewise the hail which occurred in a limited area around Grootdrink during the last week of September. The vines recovered well and the hail did not impact significantly on the crop. The copious amounts of rain and high humidity resulted in rot, especially in the earlier cultivars such as Chenin blanc, and in Sultana Seedless.

November and December saw vigorous growth due to dry, hot weather conditions and there were no diseases. Raisin grapes were damaged by widespread hail in Keimoes in December. The first rains fell shortly after New Year, followed by regular showers. From 17-23 January 2010 large parts of the Orange River region experienced heavy, widespread rain. Some areas received as much as 120 mm in less than two days.

In February the Orange River flooded its banks and where drifts were under water, many producers could not reach their vineyards. Regular showers occurred in February and March. Downy mildew was under control, except in blocks that were harvested late, where spraying proved impossible.

Grape and wine quality

The harvest was approximately 14 days later than last year – moisture, cooler temperatures and high yields delayed ripening in most cultivars. Despite widespread, above-average rainfall throughout the harvest period, producers could bring in their crops without suffering too many losses. The average wine quality is better than last year, although there were fewer exceptionally good wines. The average acids were slightly lower.

The last grapes were delivered to Kakamas cellar on 9 April 2010, thereby concluding a long, drawn-out but highly successful harvest season. Kakamas cellar had the biggest intake in the history of the cellar, namely 40 050 tons. Orange River Wine Cellar produced the most natural wine in the 40 year history of the cellar.

PAARL

Production trends

The past season and harvest ranked as one of the most difficult in a long, long time.

121 779 tons were crushed which represents a 17% decrease compared to the 2009 crop. The biggest losses occurred in Cabernet Sauvignon, Merlot and Shiraz (as much as 80%). Already at bud burst stage it was clear that Pinotage, Chenin blanc, Chardonnay and Sauvignon blanc yields would be smaller.

Crop losses occurred due to downy mildew and exceptionally strong prevailing winds which damaged flower clusters and fruit set. Wine quality nevertheless appears to be of a very high standard.

Climate and viticultural trends

Fluctuating and exceptional climatic conditions, combined with unrelenting, strong easterly and south-easterly winds, were responsible for crop losses and damage in vineyards throughout the region.

The post-harvest period in 2009 was blessed with good rainfall, but May and June were not sufficient cold. After a good winter with very low temperatures in July and August and above-average precipitation, delayed bud burst occurred during the cold, wet spring. Regular showers prevailed from September to mid-November, with a severe cold front from 7 to 13 November which brought heavy showers throughout the region, averaging 140mm in total. Subsequently there were no noteworthy showers until the end of March.

Soil temperatures were lower as a result of the late rains, which delayed growth and it seems that the areas closer to the mountains (e.g. Franschhoek and Wellington (Groenberg) were most severely affected by gale force winds and heavy downpours). At that stage it looked as though Cabernet Sauvignon, Merlot and Chardonnay would deliver an above-average harvest. Pinotage and older Chenin blanc had fewer flower clusters.

Regular showers in spring caused downy mildew and direct crop losses in practically all cultivars since it was difficult to follow preventive spraying programmes. In November producers had to wait as long as seven days to access their vineyards without their tractors getting stuck. Snails flourished in the wet conditions.

Apart from the regular showers until the end of November, the relatively cooler temperatures and constant strong wind caused uneven budding, and shoot growth was below par. In the remaining flower clusters set was much weaker than usual as a result of the relentless winds, cold and rain. Obvious wind damage could be detected in Chenin blanc, Chardonnay, Cabernet Sauvignon, Merlot and Shiraz. The framework of some vines (bush vines especially) suffered long-term damage, with shoots completely severed and/or topped short.

From December onwards vigour was profuse, although veraison was uneven in all cultivars. Small, green berries testified to the poor conditions during fruit set. Weed control was generally good, probably as a result of the dry conditions after mid-November. These dry conditions ensued and necessitated good irrigation scheduling to ensure proper ripening and to prevent shrivelling.

Mild temperatures until the end of February ensured that ripening was generally slow, resulting in good phenolic ripeness at lower sugar levels in the red cultivars especially. The harvest season concluded with high temperatures, as high as 43°C, from 27 February to 10 March. Cellar space was at a premium when many cultivars started to ripen at the same time. The heat wave early in March caused shrivelling in Cabernet Sauvignon and Petit Verdot and late Shiraz blocks.

Grape and wine quality

It was a very tricky season, but the good wine quality of the 2010 harvest is a highlight. Harvesting initially took place under almost perfect conditions and most of the crop was in before the prolonged heat wave. Chenin blanc, Sauvignon blanc and Shiraz stand out with good weight and fruit intensity. Sauvignon blanc developed lovely tropical flavours.

Due to the smaller crop most blocks could be picked at optimal ripeness. Early cultivars such as Sauvignon blanc, Chardonnay and Merlot ripened approximately 10 days earlier, partly due to the lighter crop. Veraison in Cabernet Sauvignon was earlier and harvesting took place up to two weeks earlier.

Despite the slightly lower total acids and higher pHs in grape analyses, flavour profiles were very fruity and promising.

ROBERTSON

Production trends

The 2010 vintage will be remembered for the exceptional challenges it posed to producers, viticulturists and winemakers. 175 673 tons of grapes were crushed in the Robertson Wine Valley which represents a 14% decrease compared to the good crop of 2009.

Cool, overcast and rainy weather conditions in October/November 2008 had an adverse effect on bunch initiation for the 2010 harvest. As a result of the windy conditions during flowering, fruit set was weak. The crop size was further reduced by water shortages suffered by producers who depend on run-off from the Langeberg Mountains. Some producers had to stop irrigating early in January because they no longer had any water.

Climate and viticultural trends

The post-harvest period was mild, with good rainfall from April to the end of August, when in excess of 50 mm more precipitation than the long-term average occurred. The good winter and effective dormancy breaking translated to good and even budding in early cultivars. Bud burst in the first vines started approximately 7-10 days earlier than usual.

Cool weather, good rainfall and very windy conditions lasted throughout spring, with 90mm of rain. Cold periods in October and unrelenting wind in September and October, even November restricted growth, especially in older vineyards and virus-infected blocks. The berries in all cultivars were visibly smaller.

The summer months were exceptionally dry with hardly any rain in December and January, followed by good showers and thunderstorms in February. The average summer temperatures were below the long-term average and there were only a few exceptionally hot days (above 40°C).

Regular showers from September to November caused downy mildew, but other diseases and pests were mostly absent. The harvest period was very healthy, thanks to dry weather conditions. Some of the later Colombar and Shiraz had sour rot in places.

Berries in all cultivars were clearly smaller. The smaller berries and weak growth are ascribed to the constant windy conditions during the growing season which cause the stomae to close, with a decline in transpiration and photosynthesis. This impacts negatively on all physiological processes in the vine, including growth, cell division and cell enlargement during the berry growth cycle.

The first vines to be harvested ripened approximately 7-10 days earlier than usual. Later in the season (after the February thunderstorms) the vines struggled to achieve the desired sugar levels and some blocks had to be picked at lower sugar content. Once again the older vines and virus-infected blocks struggled most to achieve the desired sugar content.

Grape and wine quality

Very healthy grapes were delivered to the region’s cellars this year. Production in all cultivars was down, especially Chardonnay, Pinotage and Colombar. Producers in the region confirm that the red wines displayed very good colour because of the smaller berries. The average quality across all cultivars is good.

STELLENBOSCH

Production trends

The 2010 crop, 102 505 tons, is 18% smaller than the 2009 crop. Reasons for the decrease are manifold and include smaller bunches without laterial bunches, climatic conditions, diseases and pests. The quality is nevertheless exceptional, even better than the very good 2009 crop.

There was a significant decrease in the early cultivars, Chardonnay and Pinotage, and to a lesser extent in Chenin blanc. Sauvignon blanc and Merlot produced good yields, Shiraz was average and Cabernet Sauvignon was largely affected by downy mildew.

Climate and viticultural trends

Temperatures from post-harvest to January were mostly higher than the long-term average. Precipitation, except in April, exceeded the long term, if not the previous winter's figures.

Spring and early summer temperatures were above-average with only September recording temperatures that were below the long-term average. In late October and November strong to gale force winds prevailed. Some areas experienced hail at the end of October.

Budding was mostly satisfactory and shoot growth occurred at the beginning of the season due to the cold, windy spring. During flowering, of the early cultivars in particular, gale force winds damaged shoots and clusters. In some areas hail occurred at the end of October and caused damage to the flower clusters, in the Durbanville area especially.

Abnormally high rainfall in November – almost four times higher than the long-term average – occurred over a period of five consecutive days; this impacted on the flowering of the late cultivars and led to downy mildew. Weak fruit set in Chardonnay, Merlot, Shiraz and Cabernet Sauvignon resulted in smaller berries. Long-horn grasshoppers were a problem, as were snout beetles, with sporadic incidents of mealy bug late in the season. Isolated outbreaks of botrytis occurred on Chenin blanc and Sauvignon blanc.

December and January were very dry and growth, which was vigorous until veraison, only ceased when the heat wave conditions struck towards the end of February. The prolonged heat wave lasted during the biggest part of March. Shrivelling of bunches occurred in some instances in Shiraz and Cabernet Sauvignon (heat effect).

Grape and wine quality

Early and late cultivars ripened much earlier and put pressure on the processing units. Grape quality was exceptionally good, with lovely grape/must analyses, high sugars and acids with low pH values. The exception was Pinotage, which still had hard skins at the time of ripening. This could be adjusted in the cellar, however. Malic acids were high, especially in the early and mid-season cultivars. Some of the red cultivars only ripened at a high sugar content. The colour of the red cultivars is exceptionally intense and even better than the previous season.

Viticulturally it was a tricky year, but from a wine point of view, it is considered an exceptional year for quality.

SWARTLAND / MALMESBURY

Production trends

The old adage that a light wheat crop precedes a light grape crop appears to hold true for the 2010 harvest. What initially seemed to be an average crop turned out to be much smaller, 97 698 tons, 20% less than the 2009 crop, mainly due to widespread downy mildew, especially in old Chenin blanc blocks, Muscat d' Alexandrie (Hanepoot), Shiraz and Pinotage. Cabernet Sauvignon and Pinotage affected by the heat wave in March were down by more than 20%. Apart from these two red cultivars, most affected were Merlot and Shiraz.

Climate and viticultural trends

Winter arrived late after a relatively warm period at the end of May. Good cold ensued with sufficient rainfall, although not as much as last year. Cold fronts in September delayed bud burst. Spring and early summer were characterised by fluctuating weather conditions, growth being hampered by very windy and slightly cooler day temperatures. These conditions also prevailed during the flowering period.

Budding was uneven in Shiraz and Chardonnay especially. Although shoot growth was initially slow in the cold, windy conditions of spring, vigorous growth ensued due to good rain in November and favourable climatic conditions.

Regular rainfall occurred throughout October and in the second week of November the entire Swartland had good showers – between 138 mm for Malmesbury to as much as 250 mm in Porterville. Hail storms left a trail of damage from Piketberg through Malmesbury to Darling. The rain caused high pressure from fungal diseases and incidents of downy mildew occurred. Where producers could not access their vineyards quickly enough, damage was caused to grape bunches. Worst affected cultivars were Grenache, Chardonnay, Carignan and Ruby Cabernet. As a result of the late showers weeds were problematic, rye grass especially. Subsequently there was hardly any rain until the end of March.

Weather conditions from mid-November until the harvest were most favourable. January and February saw a few very hot days, but the heat wave at the beginning of March 2010 which lasted more than a week, will certainly go down in the annals.

Grape and wine quality

Sugar and pHs were high from the first week in March. Practically all the white grapes were harvested before the worst heat waves and Sauvignon blanc and Chenin blanc had good fruit flavours and acid composition.

Overall the grapes were very healthy and analyses good. Red cultivars were mostly crushed at optimal ripeness (slightly lower sugars) and the grapes really looked very promising.

The hot weather at the beginning of March lasted more than a week and caused dehydration in the late red cultivars especially, with the result that some blocks had to be picked at high sugars. Wine quality, according to the region's winemakers, is nevertheless above average.

WORCESTER

Production trends

The 2010 crop of 134 030 tons were 14% smaller than the 2009 crop mostly because of strong, cold winds during the flowering period which caused weak fruit set and loose bunches. The canopies suffered from the relentless winds, resulting in small leaves and berries. Downy mildew during flowering induced sporadic losses. The absence of rain in November restricted berry growth.

Climate and viticultural trends

The post-harvest period was good and leaf fall occurred fairly late. Good accumulation of reserves took place and shoots were properly ripened throughout. May saw 40 mm of rain, June 35 mm and July 40 mm (as measured at the Nuy weather station). Good snowfall in July had a positive impact on the shallow farm dams.

Relatively high temperatures were experienced in May, the most important period for good dormancy breaking in a grapevine. Dormancy breaking products were used for cultivars such as Shiraz, which are known for uneven budding, as well as in young vineyards, for spacing purposes.

August was slightly warmer than usual and may have contributed to the uneven budding patterns. Bud burst was generally 10 to 14 days earlier than in 2008, but probably three days later than the long-term dates.

The first signs of downy mildew (primary infection) were noticed after the early rains (± 25 mm) in October. Producers were under pressure to prevent direct damage to flower clusters. Flower clusters of susceptible cultivars such as Muscadel and Colombar were damaged; the full extent would be visible in December and January. This fungal disease caused sporadic damage throughout the region which impacted directly on bunches. Hardly any incidences of oidium occurred.

In November the total precipitation at the Nuy weather station was 28.1 mm, followed by no rain in December and January, and the need for sufficient irrigation put producers under pressure. Strong windy conditions throughout the entire growing season complicated weed control and put more pressure on water resources.

Grape and wine quality

The harvest season started in the last week of January, which is fairly normal for the region. The smaller crop once again proved that yield is directly related to quality. Smaller berries and looser bunches meant that there was hardly any botrytis, which made the winemakers' job that much easier. Excellent wines were made from Chenin blanc in particular and the Sauvignon blancs that were crushed before the February heat waves are looking good. The red wines this year display exceptional colour due to the smaller berries.

ADDITIONAL COMMENTS

COASTAL REGION

CAPE POINT, CONSTANTIA, DARLING AND DURBANVILLE

Production trends

Constantia yields were down, on whites especially, between 25–50%. Steenberg bucked this trend with increases in Sauvignon blanc 50% and Sémillon 60%, though reds were down 10%. Durbanville expects a 10% increase in the crop. In Darling average yields were down 10–30%.

Climate and viticultural trends

Winter was prolonged with serious storms and abundant rain. In Constantia warmer than usual temperatures created problems with dormancy for some cultivars, especially Chardonnay. The coastal ward of Durbanville, just north of Cape Town, also experienced less cold than in 2009.

Although budding started early, towards mid-September, growth was slow in the cool conditions. One of spring's biggest challenges was the unusually high November rainfall, which ensured little irrigation was necessary later in the season, but led to a fair amount of disease pressure. Fortunately a strong south-easterly wind helped control the spread of downy mildew.

Slow vine growth – about a third of the normal rate – was a benefit since less topping was required, except for Durbanville, where a warm spring and increased vegetative growth necessitated careful attention to canopies. Strong winds during flowering encouraged uneven berry set and reduced yields.

Early summer in Darling saw humid conditions resulting in disease pressure that required a timeous spray programme when downy mildew affected some trellised vineyards. December and January were kind with little heat and wind; welcome warmer conditions arrived late January. Towards the end of February conditions in the Constantia valley also became humid with rain resulting in outbreaks of powdery mildew.

Two heat waves during the harvest ensured that vineyards which usually struggle to ripen reached the required sugar levels, though also caused some berry shrivel. In Darling the cooler conditions prevailed until mid-March when there was extreme heat, but by then there was little left to harvest.

Grape and wine quality

Grapes came in with super analyses – low pH levels, high acid and ripe flavours with the bonus of lower sugar levels than usual. Cape Point Vineyards' winemaker, Duncan Savage

enthuses over “the warmth resulting in fantastic ripeness and good flavour concentration. Harvesting times were normal but felt short and intense due to the biggest crop to date courtesy of new plantings.”

In Constantia, Steenberg’s John Loubser has nothing but praise. “The whites are wonderfully aromatic compared with 2009, which was a cooler year. Sauvignon blanc, Sémillon and Shiraz performed well. The best reds have phenolic ripeness with finesse and structure.”

Good fruit, structure and great body are positive characteristics of the 2010 Darling wines, with Viognier, Chenin blanc, Merlot, Cabernet franc and Shiraz showing well. In Durbanville properties such as Hillcrest and Meerendal saw good development of fruit flavours and full phenolic ripeness at moderate sugar levels thanks to the cool conditions. Good wines may be expected from Sauvignon blanc, Merlot, Cabernet franc, Pinotage, Malbec and Shiraz.

OVERBERG, WALKER BAY AND CAPE AGULHAS

ELGIN, BOT RIVER, HEMEL-EN-AARDE AND ELIM

Production trends

In Elgin, downsides of 2010 include vastly lower crops; Paul Cluver Estate Wines’ Andries Burger notes with disappointment his ever-popular Gewürztraminer was down 60% with the overall trend 25–30% off annual averages. High-lying Sauvignon blanc vineyards could also have lost up to 50% of the crop thanks to the wind.

In Bot River Beaumont reports reduced yields, generally noted in older blocks with low bud fertility; younger vineyards didn’t suffer as much. Jose de Andrade of Feiteiras reports his Verdelho crop was down by 60%, the overall figure is closer to 20–30%, with Chenin down for all producers.

Hemel-en-Aarde producers found Chardonnay to be among the lesser performers in 2010, mainly because of reduced yields – up to 35% down. Yields were mixed, though healthy, younger red vineyards produced increased crops.

At Strandveld in the Elim ward the Sauvignon blanc crop was 20% down and the Shiraz crop suffered 50% loss.

Climate and viticultural trends

Elgin rainfall was less than average in a winter that started late, whereas Bot River and Hemel-en-Aarde saw above-average winter rainfall but mild temperatures, causing early budding on some cultivars such as Chardonnay. In Elim, this most southerly area experienced a much longer winter than usual, with average rainfall.

Spring too was unusually cool and wet with strong winds during flowering, which damaged canopy and fruit. One optimistic producer noted: “the smaller bunches saved on green harvesting”. Elim experienced the windiest month ever in October with a black south-easter accompanied by heavy rain, which did much damage to the flowering vines.

The regular precipitation also raised disease pressure. Thanks to the wind and a judicious spray programme, mildew was kept at bay; even so, fruit set was poor. Drier, warmer conditions with few strong south-easterlies prevailed until January. Summer remained cool and dry, providing excellent growing conditions, apart from some high temperatures in March, which were felt further inland along Hemel-en-Aarde Ridge than elsewhere in the valley.

Many of the white cultivars ripened early, generally due to lower crops, and were in the cellar prior to the heat spikes in late February; reds came in long after. In Bot River the harvesting period was marked by massive fires, but Beaumont’s Sebastian Beaumont reports “no smoke damage”. In Elim, an area known for bird damage, 2010 was particularly problematic, though netting provided good protection.

Grape and wine quality

Quality compensates for quantity; smaller berries with more concentrated juice have delivered good Sauvignon blanc, Chardonnay and Gewürztraminer among whites, and Pinot noir and Cabernet franc among red cultivars. Burger also reports “clean noble rot with little berry sorting necessary, so double the volume of 2009 of the much in demand Paul Cluver Noble Late Harvest”.

There is general happiness with a selection of both white and red wines. In Bot River, If quantity was down, quality is impressive with Chenin showing intense and varied flavours with good natural acid. Verdelho, Shiraz and Cabernet are also promising.

From Hemel-en-Aarde come some really good wines, with Pinot noir at the top of the list, good Chardonnay and Sauvignon blanc, some Merlot and Shiraz, though some younger Shiraz vineyards succumbed to stress. Reds are described as dense, textured but without high alcohols. Overall quality is rated positively, also in Elim, which boasts full-bodied, fruity wines.

UPPER LANGKLOOF & KLEIN KAROO

Production trends

“Our production was definitely low, Cabernet for example yielded as little as 4-5 tons/hectare,” says Joubert. Upper Langkloof producers report that their reds were around 40% down with a turnaround on Sauvignon blanc which registered a 20% larger yield.

Climate and viticultural trends

“It was a year of extreme conditions,” says Meyer Joubert, winemaker/owner of Joubert-Tradauw Private Cellar. “Firstly we had one of the driest seasons in living memory, and secondly the night temperatures dropped very low due to the dry air.

“When it is so warm and dry one expects to harvest early, but in fact, we crushed very late. The extremely cold nights in March prolonged the picking season. End March, beginning April we were still at it.”

In the Upper Langkloof winter 2009 delivered its usual snow and cold Karoo mornings but it was arguably the driest in 40 years.

Grape and wine quality

“The vines suffered, but the wines have good extraction, dark colours and plenty of fruit flavours,” says Joubert.

In Upper-Langkloof the small harvest yielded good quality, concentrated wines, generous in colour, bouquet and flavour.

CEDERBERG

Climate and viticultural trends

Winemaker David Nieuwoudt, of Cederberg Private Cellar, the only producer in the Cederberg ward, recalls winter 2009 as long and cold, with snow and above average rainfall; budding was thus delayed by 10 days. Spring winds during flowering reduced crops on white cultivars, especially Chenin blanc, and produced looser bunches. A week-long February heat wave followed by a cold spell, led to uneven ripening of red cultivars and necessitated several passes through the vineyards to green harvest the unripe berries.

Grape and wine quality

Very little acid adjustment was necessary, comments Nieuwoudt, berries were smaller than average and extremely healthy. Elegant whites and reds with rich colour and beautiful tannin

structure are forecast with Sauvignon blanc, Cabernet Sauvignon and Shiraz, which was less susceptible to shrivelling during ripening this year, the best performers. The low yields of Pinotage should also produce good quality.

PAARL, WELLINGTON & FRANSCHHOEK

Climate and viticultural trends

Growth was delayed by low soil temperatures, especially in areas closer to the mountains, such as Franschhoek and Wellington (Groenberg). Although mild weather followed with a warmer than average January, for some Franschhoek producers the shoot length never caught up.

In Voor-Paardeberg, the sheltered nature of most of the area ensured it wasn't so badly affected by the vicious spring south-easterly winds. In Franschhoek, some vineyards suffered 100% crop loss.

Says Fairview's Anthony de Jager: "We had a really good ripening period and cool, moderate lead up to the harvest, so the grapes had plenty of time for steady ripening. This year we decided to bring grapes in a little earlier, as we are very aware of the alcohol levels. They were showing good phenolic ripeness at harvest, with sugars at around 22 degrees balling, thanks to a concerted effort in the vineyard.

"During the third week of February, we saw forecasts for some very hot weather and we stepped up the efforts on our larger white wine plantings – Sauvignon blanc in Darling, as well as Viognier in Paarl. By Friday 19th we had brought virtually all of our white grapes in, with the last of the Viognier coming in early on the 20th, as the heat arrived. We had also brought in a lot of Shiraz and Pinotage by that time." In Wellington, on one particularly hot day, the mercury shot up to 49ºC.

Grape and wine quality

"The Sauvignon blancs don't have the explosive aromatics of the 2009s, but there is even better mouth feel and palate weight," comments De Jager. "This can be attributed to a combination of improved canopy management, the maturing vineyard and of course the cool conditions of the harvest. The Chenin blanc is amazing - watch that wine! On the red side, the early Pinotages are some of the best that I have seen from this farm, with soft, supple tannins and rich fruit. They promise to be lovely, elegant wines."

In Wellington best performers include Viognier, Shiraz and Cabernet franc with Merlot, Cabernet Sauvignon, Petit Verdot, Mourvèdre and others affected by the later heat. The best wines show excellent potential.

ROBERTSON

Production trends

"The production of the reds was very low," confirms Arabella's Stephen de Wet, "reasons were probably downy mildew, a bit of botrytis and a succession of heat waves which dried away the fruit."

Grape and wine quality

Says De Wet: "We have, as is the case with many other wineries, started bottling the 2010 Sauvignon blanc and are really happy with it. There is good fruit on the nose and palate and the finish fresh and clean. The colour of the reds is brilliant and the tannins are rich and full."

STELLENBOSCH

Climate and viticultural trends

According to Tokara winemaker, Miles Mossop, the harvest was extremely challenging. “It has been very intense. It started very late due to late budding from an extended winter into October and November and a relatively cool growing season into February. The bad weather we experienced (high winds and rain) in November during flowering resulted in relatively small crops, which have led to wines of intense concentration and character. The harvest was brought on rapidly by intense dry conditions, which were relentless and continued from the end of February through to the end of March. This resulted in everything ripening at once which put a lot of strain on the cellar.”

SWARTLAND

Climate and quality

“January and February were relatively cool with cool nights especially contributing to very good colour in the red cultivars,” says Kloovenburg Vineyards’ Pieter du Toit. “Practically all the white grapes were harvested before the heat waves struck in all earnest and Sauvignon blanc had good fruit flavours and acid composition, with Shiraz and Cabernet displaying great complexity.

III. ELSEWHERE IN THE SOUTHERN HEMISPHERE

Australia

The total tonnage of grapes is likely to be down significantly on last year’s (bumper) harvest.

After 2009’s devastating fires and heat wave, the 2010 climatic conditions were excellent with moderate weather and good winter and spring rains to boost growth. The 2009/10 growing season began in late August with bud burst on average seven to 10 days earlier than in 2008. The early budburst was attributed to the warmest winter on record with mean minimum temperatures well above average and no winter frosts.

It was an average year for rainfall and the vineyards started the season with a full soil profile for the first time since 2005. Early spring was relatively cool with very slow vine growth through much of September and October. November was the total opposite, with a heat wave early in the month when seven out of nine days were above 40°C. These extreme temperatures were followed by rain which helped rehydrate the thirsty vines. Subsequently the weather remained relatively mild.

Despite the early heat wave the vines developed strong, healthy canopies and given the mild summer, leaf health was very good at the start of veraison. Veraison began in early January and progressed quickly in all varieties.

With most varieties flowering at the same time in many regions, the 2010 vintage was one of the most condensed with crushing completed by the end of March compared with mid-April in 2009. The quality of this year’s vintage looks overall good through to excellent, with many vineyards planted in the 90s now maturing well and producing great fruit. Whites show intense varietal characters while the reds display excellent colour and flavour.

New Zealand

The 2010 New Zealand grape harvest was expected to be slightly smaller than the 2009 vintage, despite 2 000 more hectares coming into full bearing, bringing the total to 33 000 hectares of grapes. Producers expected to harvest between 265 000 and 285 000 tons of grapes, according to the New Zealand Winegrowers’ annual pre-vintage survey.

Growers had a great start to the season with a warm flowering and fruit set period. Above average rainfall in January and a cool spring period slowed the start of the traditional growing season. With the cooler summer, late season heat and dry weather, wines will typically have deeper colour and great aromatics due to the higher natural acids in the grapes. The 2010 harvest started about two weeks later than usual.

Argentina

Production for 2010 was expected to increase from the poor crop in 2009, but would still be below normal levels. Estimated at 2,4 million tons (13,2 million hectolitres), the harvest was smaller due to unfavourable weather at the beginning of 2010. According to Argentina's National Wine Institute, extremely high temperatures, low humidity and hail storms impacted on the lower production output this year.

Chile

Despite the damage caused by the earthquake that hit the productive heart of the Chilean wine industry – 70 percent of the country's vineyards are very close to the earthquake's epicentre – the harvest of vintage 2010 was expected to end without major surprises, according to estimates by the Association of Wines of Chile. The 2010 harvest was projected to reach 800 million litres, 7,8% below the 2005-2009 average of 868 million litres. The losses caused by the 8.8 magnitude earthquake of 27 February were estimated at about 125 million litres of inventory.

IV. VINTAGE GUIDE

The number of wine regions, their geographic distance and climatological diversity defy generalisation, but the overall characteristics of recent vintages may be summarised as follows:

2009: Probably one of the most memorable vintages ever. Both white and red impress with intensely concentrated flavours. Thanks to extremely healthy grapes, a cool growing season and lower yields, truly excellent wines were made from all the noble cultivars, including Sauvignon blanc, Chardonnay, Shiraz, Cabernet Sauvignon and Merlot.

2008: Elegant wines with a lower alcohol content due to cooler weather conditions. Slower ripening favoured phenolic ripeness, with excellent quality implications for red wines. Lovely colour and flavours from early ripening vines.

2007: As good as, or better than 2006. Quality all round, with elegant Sauvignon blanc and well-structured Chardonnay the stars amongst the white wines. Climatic conditions and cooler Feburary temperatures favoured physiological ripeness. Black grapes had smaller berries with superb skin to fruit ratios. Magnificent colour, flavour concentration and overall structure.

2006: Quality across the spectrum. Intense character and exceptional flavour concentration. Top quality Chardonnay, Sauvignon blanc and Chenin. Full-bodied Shiraz with excellent maturation potential. Pinotage and Cabernet Sauvignon boast lovely colours and flavours.

2005: A difficult vintage with a very dry winter, excessive rainfall during the crush and a scorching heat wave towards the middle of February. Smaller crops meant concentrated flavours and lovely colours. Magnificent red wines, but careful selection is mandatory.

2004: The harvest seemed to drag on forever, but it was well worth the wait. Elegant wines with greater maturation potential due to a cooler season. Lower alcohol and soft tannins characterise this vintage.

2003: An excellent vintage, one of the very best in recent years. White as well as red wines impress with full-bodied structure and complexity.

2002: Pay attention to individual cellars, rather than general trends. Downy mildew caused widespread havoc. Good Sauvignon blanc, Chardonnay, Shiraz, Merlot, Pinotage and new clone Cabernet Sauvignon wines.

2001: The summer was very hot and dry with few diseases. Wines were high in alcohol, with very concentrated flavours.

2000: The crop was small. Some excellent red wines that will keep well. Big, alcoholic white wines.

1999: Large crop, warm summer. Excellent ripening conditions. Reds high in alcohol, will develop in time. Fruity whites.