

SOUTH AFRICAN WINE HARVEST REPORT

2021



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SLOW AND STEADY WINS THE RACE

WINE LOVERS FROM ACROSS THE GLOBE CAN ENJOY OUTSTANDING WINES FROM A MUCH COOLER AND LATER 2021 WINE GRAPE SEASON IN SOUTH AFRICA.

“ It seems as though the vines really took their time to prepare this year's harvest,” says Conrad Schutte, consultation service manager of the wine industry body Vinpro. “Moderate weather throughout the season, and specifically during harvest time, resulted in grapes ripening slower, while developing exceptional colour and flavour. ”





WARWICK WINE, MARTIN LOUIS CAHNBLEY

The 2021 wine grape crop is estimated at 1 461 599 tonnes, according to the latest estimate of industry body SAWIS (South African Wine Industry Information & Systems) on 19 May 2021. It is 8.9% larger than the 2020 harvest.

The harvest kicked off around two weeks later than normal due to unusually cool weather conditions throughout the season, which persisted throughout harvest time and resulted in some wine grape producers harvesting their last grapes in May. Water resources were also replenished in most regions following the recent drought, which contributed to good vine growth, bunch numbers and berry sizes.

“Although these are general observations, it is always important to take the South Africa wine industry’s diversity over ten wine grape growing regions into account,” Conrad says.

REMARKABLE WINES

“The late and slow harvest was definitely worth the wait. Wine lovers can really look forward to remarkable wines from the 2021 crop,” Conrad says. “The cooler weather enabled producers to harvest their grapes at exactly the right time, and viticulturists and winemakers are especially excited about good colour extraction, low pH levels and high natural acidity in cases where vineyards were managed effectively, which all point to exceptional quality wines.

The 2021 wine harvest – including juice and concentrate for non-alcoholic purposes, wine for brandy and distilling wine – is expected to amount to 1 136.4 million litres at an average recovery of 778 litres per ton of grapes.

“We are delighted that harvest 2021 has proven to be somewhat of a silver lining for the South African wine industry, which will no doubt further bolster our international positioning,” says Siobhan Thompson, CEO of Wines of South Africa (WoSA). “What stands



DIEMERSDAL

“WE ARE DELIGHTED THAT HARVEST 2021 HAS PROVEN TO BE A SILVER LINING.”

out above all else is the consistency in quality that we have come to see over recent years. This will go a long way to convincing those who may still have been on the fence and reinforce our overall standing alongside our international competitors. It is also very promising to note that the volume and value of wine exports from South Africa are higher compared to the year on year figures in 2020 and 2019.”

South Africa is the ninth biggest wine producer world-wide and produces about 4% of the world's wine. The wine industry contributes more than R55 billion to the country's gross domestic product (GDP) and employs 269 069 people throughout the value-chain, of which 80 183 work on farms and in cellars.

2020/21 GROWING SEASON

The weather was moderate in most regions during the post-harvest period, which led to leaves falling later than normal and vines building up good reserves. Producers also had access to sufficient water for post-harvest irrigation.

STRIKE A BALANCE

Intermittent restrictions on the export and local sale of alcohol in South Africa from March 2020 to February 2021 as part of the country's national state of disaster resulted in 650 million litres of wine stock at the end of 2020, of which a large portion was not yet contracted.

“With so much stock still in the tanks at the beginning of harvest time, producers and wineries were concerned about processing and storage capacity when taking in the new harvest, many of whom rented additional storage space or restored old tanks,” says Rico Basson, Vinpro MD. “However, the fact that sales reopened, along with harvest starting later than normal, helped ease the pressure to some extent.” A number of wineries were also able to secure contracts with grape juice manufacturers, which helped work away some of the stock.

“The larger wine grape crop will require careful planning from producers and wineries to sell the current wine stock in a responsible and sustainable way. This situation will, however, also create the opportunity for innovation and growth of existing and new markets,” Rico says.

Winter was colder than the previous season, with much higher rainfall, which replenished water resources and led to sufficient cold accumulation to break dormancy.

The cold and wet weather continued into spring, which contributed to homogenous, but delayed bud-break and initial growth. In the coastal region, however, the wetter conditions made the timing of disease control more challenging.



SHUTTERSTOCK



REUMAONT WINES, JEN PEARSON

**“THE COLD AND WET
WEATHER CONTINUED
INTO SPRING.”**

Frost damage occurred in some irrigation areas and it was expected that significant frost damage in the lower lying areas of the Northern Cape and strong winds in the Cape South Coast region would have a notable effect on these crops. Fortunately, the frost and wind occurred at an early enough developmental stage for vines to recover.

Flowering and set was mostly efficient and even, while shoot and leaf growth picked up the pace by the start of November, which necessitated additional inputs from producers to manage the fast and vigorous growth.

Temperatures remained moderate during the summer, which slowed down ripening and resulted in harvest time starting out around two weeks later than normal. Although most wine regions experienced little rainfall during harvest time, there were also almost no characteristic heat-waves, and the lower day and night temperatures throughout the season led to producers waiting patiently for grapes to reach optimum ripeness.

OVERVIEW OF REGIONS

BREEDEKLOOF A very late season, characterised by a good balance between yield and quality, as vines developed healthy canopies during a moderate growing season.

CAPE SOUTH COAST Challenging weather conditions led to a smaller crop, but enabled producers to truly make cool climate wines of exceptional quality.

KLEIN KAROO Moderate weather conditions, good water availability and sufficient winter rainfall in certain areas resulted in a larger crop and great quality, although drought conditions still persist in some parts of the region, placing wine grape producers under great pressure.

NORTHERN CAPE A good wine grape crop in terms of quality and volume, despite challenges in terms of sugar accumulation and load shedding during the peak of harvest time.

OLIFANTS RIVER A later and cooler season resulted in slow, but even ripening of a somewhat larger and outstanding quality wine grape crop.

PAARL Good water availability, sufficient reserves and cooler weather contributed to yields equal to that of 2020, which will result in elegant wines.

ROBERTSON Although it was a long and extended season, the vineyards realised a higher, exceptional quality yield.

STELLENBOSCH A smaller crop, but outstanding quality grapes, resulting in great wines with good ageing potential.

SWARTLAND Consumers can look forward to exceptional wines from this year's crop, following moderate weather conditions and slow ripening.

WORCESTER One of the latest harvests recorded in this region, bringing with it a larger wine grape crop and remarkable wines.



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REGIONAL OVERVIEW

Vinpro's viticultural consultants hereby provide an overview of the 2021 season, as well as the wine grape yield and quality in South Africa's ten wine grape growing regions.





BREDEKLOOF

“The 2021 wine grape season was much later than usual in the Bredekloof region, but can be characterised by a satisfactory balance between yield and quality, especially for the first half of harvest period,” says Pierre Snyman, Vinpro’s viticulturist for the Bredekloof region.

PRODUCTION

The 2021 crop is estimated to be larger than the 2020 crop. This region has recovered from the carry-over effects of the recent drought sooner than, for example, the Worcester region, which did not affect the current season. However, the crop was harvested much later than previous seasons, which placed pressure on cellar capacity from the middle of the harvest period.



CLIMATE AND VITICULTURAL TRENDS

The first winter frost only occurred in June, which contributed to relatively late leaf fall, was conducive to the ripening of winter shoots, and ensured adequate reserve accumulation. Cold units started to accumulate early and were much higher month to month than the previous season. It was an above-average rainy season, with 372 mm of rain recorded at Bothasguns weather station, compared to 300 mm of rain the previous winter.

Bud break occurred 10 to 14 days later than the previous season. This is attributed to the cold climatic conditions that lasted until September, but is also due to considerably fewer heat units recorded from April to the end of December compared to the previous year. Flowering was also delayed by 14 days, and fairly good fruit set was obtained despite windy conditions. The cooler weather continued throughout November and to a lesser extent in December, resulting in lush shoot growth and slower berry development.



In January, the heat units gradually increased to similar levels as the previous year. Many vineyards then also came to a standstill due to temperature rises and irrigation resources were instantly under pressure. Véraison was even and fast in most blocks, yet more than 14 days later than usual. As a result, producers in the Breedekloof region only started harvesting the crop in February and the harvest period was continuously 14 days later compared to the 2020 season. The ripening rate was fairly normal, although some Pinotage blocks were particularly late.

GENERAL REMARKS



Powdery mildew was problematic, particularly among the white cultivars, which led to Botrytis infections. This can be attributed to the delayed season, especially where producers did not necessarily adjust their fungus management accordingly. Weed pressure was excessive on some farms.

Vineyards initially showed vigorous growth, but came to an abrupt standstill in January as temperatures rose. Uneven ripening seems to be an increasing problem in the region and has made accurate sampling exceedingly difficult.

The Brandvlei Dam is currently 33% full compared to 15% in 2020 and the Stettynskloof Dam is 45% full compared to 51% last year. Enough water is available, including farm dams, to apply adequate post-harvest fertilization.



GRAPE AND WINE QUALITY

Grape analyses were consistently acceptable with high natural acidity. Producers managed to harvest white cultivars at 20°B and above, in line with buyers' preferred wine style for this region. Excellent quality Chenin Blanc and Sauvignon Blanc wines have been made. As was the case in other regions, carry-over stocks due to Covid-19 restrictions on liquor sales led to cellar space being an enormous concern throughout the harvest season.

**“VÉRAISON WAS MORE
THAN 14 DAYS LATER THAN
USUAL.”**



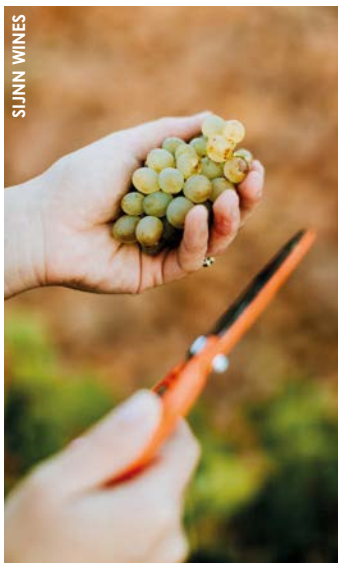
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CREATION WINES, MADISON VOLKWIN

CAPE SOUTH COAST

"The Cape South Coast region experienced a challenging season, and although the yield is lower than last year, an extremely cool season has given producers the opportunity to make genuine cool climate wines of exceptional quality," says Etienne Terblanche, Vinpro's viticulturist for the Cape South Coast region, which stretches from Grabouw, Bot River, Hemel-en-Aarde Valley, and Elim, to as far as Plettenberg Bay.



SLINN WINES



ATARAXIA



LOMOND WINES



ATARAXIA

Producers have once again experienced issues with dormancy, along with challenges regarding high disease pressure and additional inputs needed to manage lush growth.

PRODUCTION

The region has realised much lower yields this year than in 2020. Early cultivars such as Pinot Noir and Chardonnay suffered the most, mainly due to the transfer effect of sub-optimal dormancy, coupled with cool weather conditions during spring.

In addition, Botrytis rot claimed part of the crop, especially among Sauvignon Blanc and Shiraz, which displayed particularly late ripening cycles. Due to the prolonged season, cellars did not experience significant pressure and the grapes could enjoy even more attention in the cellar compared to other years when the pressure was higher during the harvest season.

Overall, low yields in the early cultivars, as well as the smaller berries that occurred across the entire cultivar spectrum, drove the overall trend. The Sauvignon Blanc yield was slightly lower this year, while the Shiraz and Merlot yields were higher in many cases. Due to downy mildew, sensitive Grenache Noir vineyards have shown significant crop losses.



CLIMATE AND VITICULTURAL TRENDS

During the post-harvest period, irrigation water was limited in the arid parts of the Overberg and many producers could not apply water during this time. Higher reserves closer to the coast and in Elgin did however allow it. Leaf fall was consequently slightly earlier than usual, which, together with hot and dry conditions during the post-harvest period, had a negative effect on successful reserve build-up. Late autumn and early winter temperatures were moderate and cold units began to accumulate about 14 days later than usual.

Winter rainfall in the coastal areas was significantly higher than the previous season, and up to 150 mm more rain was recorded during winter in the Hemel-en-Aarde Valley. Sufficient cold units were built up, but were fewer and accumulated at a slower pace than the previous season. A short, warmer period at the beginning of August led to undesirably early budding. Dormancy-breaking agents were commonly applied, but the effect was often reduced by particularly cool late-winter and early-spring conditions shortly after application.

In parts of the Cape South Coast region such as Elgin, Grabouw and Bot River, bud break was particularly even, while sensitive cultivars closer to the coast such as Shiraz were very uneven from the outset. Wet conditions, coupled with lower than average soil temperatures, delayed initial growth by up to three weeks. The flowering and fruit set periods were characterised by continuous cool conditions with moderate winds and frequent light rain showers. The lower temperatures in particular caused the occurrence of millerandage (large and small berries in the same bunch) in both Chardonnay and Pinot Noir vineyards.

The growing season in this region is often associated with gale-force winds, which was not the case this year. Leaves remained intact for a particularly long time, while sufficient groundwater

“THE GROWING SEASON IN THIS REGION IS OFTEN ASSOCIATED WITH GALE-FORCE WINDS.”

reserves ensured good to lush growth. Producers had to curb the lush growth with additional canopy and defoliation actions, especially in Sauvignon Blanc vineyards, to provide adequate canopy aeration.

Véraison occurred, as was the trend for the rest of the season, two to three weeks later. The red cultivars took a particularly long time to complete véraison, forcing producers to apply strict crop control. Ripening was characterised by extended hang time. Cultivars were mostly harvested in the traditional order, with the exception of Shiraz, which ripened particularly later than usual.



GENERAL REMARKS

The 2021 season was particularly challenging in terms of the occurrence of fungal diseases, extremely high downy mildew pressure throughout the season, and issues with powdery mildew, which occurred from December until ripening took place. In cooler microclimates, downy mildew led to drastic crop losses, while it only affected the canopy's capacity to ripen the crop in other areas.

Frequent light rain showers during harvest also brought about challenges with regard to both Botrytis and sour rot. Nevertheless, producers, who reacted swiftly to changing weather conditions, were able to cope with the disease pressure.

While water supplies were plentiful, producers irrigated less despite the appearance of large, lush canopies. The good winter rainfall leached salts from brackish soils and improved the quality of the topsoil. However, frequent rain showers increased weed pressure, which required further additional management input.



GRAPE AND WINE QUALITY

Despite challenges in the vineyard, winemakers and viticulturists expect excellent wines from good quality grapes. The majority of cultivars grown in the Cape South Coast region are well adapted to the cooler conditions and produce wines with attractive flavour profiles, high acidity and low pHs.

Among the white cultivars, Sauvignon Blanc and Chardonnay stood out in particular. Alcohol levels appear to be lower than last season, especially with red cultivars such as Pinot Noir and Shiraz, where producers have achieved good tannin ripeness at lower sugar levels. The YANs were above average with high glucose:fructose ratios, which resulted in healthier fermentations.

Late ripening cultivars infected with Botrytis rot still produced good wines, provided the sorting was adequate. At this stage, red wines show good colour extractions, fine tannins and fresh acidity, all of which are surely indicative of elegant wine styles with good aging potential.



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KLEIN KAROO

“In the Klein Karoo, the 2021 vintage will be remembered for the fact that it was very late, but produced good yield and quality,” says Hennie Visser, Vinpro’s viticulturist for the Klein Karoo region.



Moderate climatic conditions, adequate water availability and good winter rainfall have led to good yields across the cultivar spectrum.

PRODUCTION

This region's harvest is larger than the previous year due to a moderate climate, more available irrigation water and sufficient winter rainfall to leach saline soils. This trend was observed for all cultivars. Higher rainfall is still urgently needed to ensure sustainable harvests in the future.



CLIMATE AND VITICULTURAL TRENDS

Despite improved winter rainfall, compared to the previous season, the Klein Karoo experienced a dry winter with low disease pressure. In general, vineyards grew significantly better than the previous few years due to increased irrigation water and temperate weather conditions.

The drought in the Klein Karoo over the past few years has had a negative effect on vineyard reserves and this was particularly evident in blocks that were harvested later in 2019, of which growth was weaker in the following season. In most cases, the quality of the available irrigation water was unsatisfactory.

Due to the ongoing drought and associated challenges with saline soils, the vines' leaves fell earlier than normal. The vineyards that receive irrigation water from CBR scheme in the area have performed much better this season after the 2020 harvest.

From May onwards, however, the situation improved. The total winter rainfall recorded at the Derdeheuvel weather station between Montagu and Barrydale was 141.8 mm – about 30% higher than the long-term average and about four times more than the previous winter. The winter rains brought definitive relief by leaching saline soils and wetting the soil profiles sufficiently. However, in some parts of the Klein Karoo, the drought remains a serious concern. Limited runoff water from the mountain was available, as the soils were extremely dry and first had to be saturated.

Sufficient cold units were recorded with snowfall in some places, which was sufficient for the breaking of dormancy. It was therefore not necessary to administer dormancy-breaking agents. Natural cover crops such as barley performed well after the good rainfall.

Bud break commenced approximately 7 to 10 days later than usual, and was even overall, as expected after the sufficiently accumulated cold units prior. Initial shoot growth was slow and slightly uneven due to the late cold conditions. In the early ripening blocks, the leaves initially turned yellow due to cold and wet soils, but this improved as temperatures increased and vineyards eventually grew more vigorous than usual. Flowering occurred about 10 to 14 days later than usual and fruit set was sufficient due to moderate weather conditions.

Véraison also commenced 10 to 14 days later than usual, but was mostly even. Dry weather conditions experienced during spring continued throughout summer, but temperatures were slightly lower, which contributed to the harvest period kicking off roughly two to three weeks later than usual.



GENERAL REMARKS

In general, most producers in the Klein Karoo had more irrigation water than the previous few years, which enabled them to improve fertilizer applications.

Although weed pressure was high after the good winter rainfall, the rest of the season was relatively dry and there was little to no downy mildew, thanks to low spring and summer rainfall. However, occasional powdery mildew occurred on cultivars that are more susceptible to it, such as Chardonnay, Chenin Blanc and White Muscadel, despite good spray programmes. At the end of the season, Botrytis and sour rot also occurred.

Frost damage occurred in the Montagu area in late September, but losses were minimal.



GRAPE AND WINE QUALITY

White wines display beautiful, fresh flavours and the wine quality seems promising at this stage. Good acidity and pHs were recorded, but later declined in blocks that struggled to ripen. Red cultivars generally show excellent colour and structure, with a fruity palette.



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ORANGE RIVER CELLARS

NORTHERN CAPE

“The Northern Cape region generally experienced a prosperous year, both in terms of yield per hectare and the production of good quality wine and concentrate,” says André Aggenbag, viticulturist at Orange River Cellars.

However, it was also a challenging season in terms of sugar accumulation, downy mildew control and power outages during the peak harvest season.

PRODUCTION

Despite considerable uprooting and frost damage, the yield is equivalent to the 2020 harvest. This can be attributed to the fact that grapes, which were traditionally transported to cellars in the Western Cape, are now being delivered to cellars in the region. It is also noteworthy that frost damage occurred sooner than usual, and that the vineyard was able to recover to some extent by means of secondary growth. While Chenin Blanc vineyards were affected by frost damage to a greater extent, Colombar experienced an above-average production year.



CLIMATE AND VITICULTURAL TRENDS

The first genuine frost occurred earlier than in the previous season, while canopy management actions resumed at least two weeks later than usual. The cold units that accumulated by the end of June were significantly more than the corresponding time in 2019. Total cold units for the full winter period were also more than the previous year. After leaf fall and during pruning, it was evident that bearers were generally well ripened and available in sufficient numbers for long-bearing cultivars. Lower average temperatures prevailed until the end of August with day and night temperatures rising gradually from the beginning of September.

For early cultivars, bud break started on 14 September – about 7 to 10 days later than the previous year – mainly due to lower day and night temperatures during the first half of September compared to the long-term average. At times, temperatures



dropped rapidly and then gradually rose again, as a result of the many cold fronts that moved across the Western Cape throughout September.

Bud break occurred evenly and most cultivars displayed good budding percentages. Initial bunch numbers were adequate, suggesting promising yield potential for the 2021 crop. However, widespread frost damage occurred by early October, especially in areas east of Upington, which had a negative effect on ultimate crop size.



GENERAL REMARKS

Vineyards were healthy and vigorous until the end of January 2021, despite more than 100 mm of rain that occurred in the entire Northern Cape region at the beginning of the month. Frequent widespread rain showers during February, however, caused rot and downy mildew to occur, leading to limited losses. No water shortages occurred during the entire season; on the contrary, many producers were exposed to flood hazards due to the large volume of rainwater in the Orange-Vaal system.



GRAPE AND WINE QUALITY

For early cultivars, established on suitable soils, grape quality was excellent with good sugar accumulation, acidity and pHs. Rot due to rain showers, as well as the appearance of downy mildew later in the season, resulted in poorer quality. Interestingly, no difficulties were experienced with red cultivars; the entire red cultivar spectrum was of excellent quality. White cultivars generally struggled to accumulate sugar, largely due to the appearance of downy mildew. Further, this led to leaf fall, which in turn exposed the bunch zones to the sun and in many cases resulted in sunburn damage before the bunches were physiologically ripe. In general, however, the wine quality still seems promising.

**“VINEYARDS WERE HEALTHY
AND VIGOROUS UNTIL THE
END OF JANUARY 2021.”**



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OLIFANTS RIVER

“Amidst challenging conditions, producers in the Olifants River region have harvested great crops thanks to favourable climatic conditions,” says Gert Engelbrecht, Vinpro’s viticulturist for the Olifants River region. “The season will be remembered for being very late, with cooler weather and above-average grape quality.”

Cooler weather than usual, with a few heat peaks above 40°C, led to slow but even ripening, which resulted in improved preservation of flavours and darker grape colour. Cellar space was under pressure for the first time in several years – not because of a record harvest, but due to high stock levels following Covid-19 related trade restrictions.

PRODUCTION

All cultivars produced somewhat higher yields, although it was especially the white grape varieties that performed well with Chenin Blanc, Colombar and Sauvignon Blanc as the main performers. The transfer effects of the drought is therefore in the past.



CLIMATE AND VITICULTURAL TRENDS

The 2020 post-harvest period was favourable compared to previous few seasons, thanks to moderate temperatures with few extremes and adequate water supply. A welcome rain shower of 15 mm was also recorded in April. This season, leaf drop occurred as late as mid-June, providing adequate time for reserve build-up. A few days with above-average high temperatures were recorded in May, at the end of autumn.

Warmer weather conditions than normal continued from May to July, with higher daytime temperatures and normal night-time temperatures. This drastically affected the accumulation of cold units, with Richardson units only accumulating in August after daytime temperatures dropped sufficiently. These temperature fluctuations could potentially have affected the breaking of dormancy. Some producers thus used dormancy-breaking agents in Shiraz and Chardonnay blocks, with good results. Winter rainfall was about 80% of the long-term average and water resources were adequately replenished.

August, September and October were colder than usual, leading to delayed and slower bud break. However, compared to the warmer August in 2019, budding was less even. The cool conditions continued throughout November and were, together with limited heat peaks and wind, beneficial for flowering and fruit set, with limited shatter. Flowering and set were therefore not as fast and even compared to the previous season.



Shoot growth was consistent throughout the season, with no extreme wind or temperatures that could limit it. As a result, the vineyards developed lush canopies, which required canopy management actions to obtain correct form and sunlight penetration. The cool weather led to delayed véraison and took longer than the previous season. The colder than normal conditions also continued throughout the harvest period until mid-April, which resulted in the season commencing two weeks later and ending three to four weeks later overall. In general, all cultivars were harvested later than usual, but Sauvignon Blanc and Merlot particularly stood out in 2021 as exceptionally late.



GENERAL REMARKS

The Clanwilliam Dam was consistently 10% fuller compared to the previous season due to spring rainfall in the catchment area. With larger canopies and larger crops, it is likely that water consumption was higher than in the 2020 season.

Cloudy weather conditions during the growing season, with a heavy rainstorm at the beginning of October, led to increased disease pressure (especially powdery mildew), and where spray programmes were not applied correctly, challenges arose. The strong vegetative growth and dense canopies also contributed to increased disease pressure. Late downy mildew on shoot tips was also a common occurrence in lush, lower-lying blocks. There were no further phenomena that could negatively affect the

harvest. The heat waves that usually affect the harvest were less prevalent, with very few hours above 40°C, especially during December, February and March.

Weeds were a challenge on the vine berm, as can be expected in the summer months, but had no significant effect on crop production this year. Crop losses due to rot were also negligibly small. There may have been possible crop losses in blocks harvested too late due to cellar space challenges, but this small percentage did not have a substantial effect on the overall yield.



GRAPE AND WINE QUALITY

The somewhat larger crops led to lower sugar levels, which consequently implies lower alcohol wines. Especially late ripening white cultivars like Colombard will tend to have lower alcohol levels. Favourable weather conditions ensured decent colour and flavour development, with favourable acidity and pH analyses and high YAN levels, which are good indicators of quality. Especially Sauvignon Blanc, Chenin Blanc and Cabernet Sauvignon cultivars show promise.

**“THE COLDER THAN
NORMAL CONDITIONS
CONTINUED
THROUGHOUT THE
HARVEST PERIOD UNTIL
MID-APRIL.”**



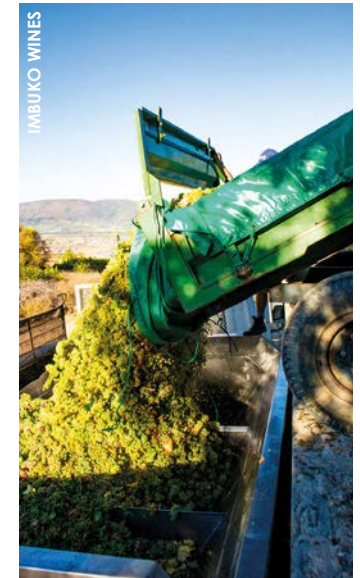
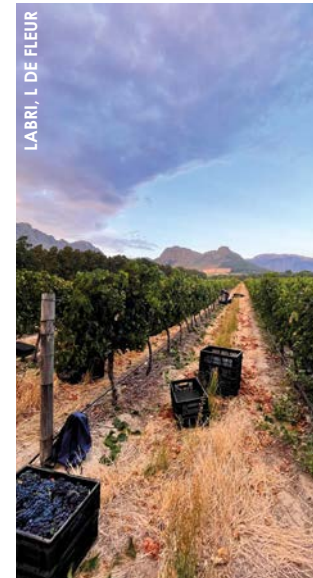
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PAARL

“In the Paarl region, this season’s harvest period commenced and finished late. However, adequate water supply and improved reserves ensured a good quality crop and sufficient yield”, says Hanno van Schalkwyk, Vinpro’s viticulturist for the Paarl region, which includes Paarl, Wellington and Franschhoek.



Cellar capacity was under less pressure this season and at times producers had to wait for the grapes to reach the desired degree of ripeness. The lack of severe heat waves, which usually occur in this region, has largely contributed to even ripening and excellent, elegant wines are expected. However, leafroll infected, late red cultivars struggled to reach optimal ripeness levels.

PRODUCTION

Due to sufficient water supply throughout the season, as well as improved reserve build-up in vineyards compared to previous years, the fertility and bunch numbers were excellent. Merlot, Cabernet Sauvignon and Cinsaut produced satisfactory yields, but Chardonnay and older Chenin Blanc blocks' crops were smaller compared to the region's long-term average.



CLIMATE AND VITICULTURAL TRENDS

After the 2020 harvest, most producers had enough irrigation water to supply vineyards' water and nutritional needs; with the early harvest, the vines were generally in good condition and the leaves could be preserved for longer than usual. This ensured that the active leaves could accumulate sufficient reserves for the next season, which is important for fertility and initial shoot growth.

Higher average rainfall was recorded during the past winter than over the previous five years. Sufficient cold units were accumulated since the beginning of June, which adequately met the vineyards' needs. The past winter season in the Paarl region was marked by temperature fluctuations. The second half of July recorded warmer daytime temperatures, during which stress-induced bud break was observed at shoot tips. Colder weather returned during August, with good rainfall and snowfall on the surrounding mountain ranges.

“VÉRAISON WAS RELATIVELY SLOW AND UNEVEN.”

Spring was cool and bud break generally occurred 7 to 14 days later than usual. Initial growth was slow and budding was less even than the previous season. Temperatures during the growing season were relatively moderate and strong growth vigour was observed due to good water supply, especially after widespread rain showers in November. Bunches set pretty well, although uneven set between bunches were evident. Véraison was relatively slow and also uneven. In the case of premium blocks, more grapes had to be removed to ensure a consistent crop.

During early January, temperatures rose sharply, leading to sunburn damage on exposed bunches, but the rest of the harvest commenced without the usual heat waves. Due to the delayed budding and good yield, the harvest started about 14 days later than usual, but it also finished late and producers had to wait for certain blocks to reach the desired degree of ripeness. The peak of the harvest period continued over a longer period of time and cellars were under less pressure to process the crop. Rainstorms during March aided the ripening process, especially in dryland blocks.



GENERAL REMARKS

Widespread rain showers in November led to downy mildew infections and widespread damage occurred on bunches, although it did not significantly affect yield. Late powdery mildew was an issue for some producers where fungicide applications was stopped too soon. Sour rot sporadically occurred during the harvest period in blocks with poor airflow. Leafroll symptoms were noticed early on and had a significant effect on late ripening Shiraz and Cabernet Sauvignon blocks, which struggled with ripening.



GRAPE AND WINE QUALITY

Grape analyses were consistently promising with low pHs and high titratable acidity levels. Due to the moderate temperatures, malic acid levels were high and grapes could be harvested at moderate sugar levels. Colour development was generally better than the previous season and tannins already tasted soft at lower sugar levels. Beautiful flavours were noticed in Sauvignon Blanc blocks, among others. White and red wines show promise in terms of quality, with the exception of late ripening, leafroll infected red cultivars that showed sluggish ripening.



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ROBERTSON

“Although it was a long and drawn-out season, the Robertson region achieved a good quality and larger than expected 2021 wine grape harvest, thanks to sufficient irrigation water and less frost damage compared to the previous few years,” says Hennie Visser, Vinpro’s viticulturist for the Robertson region.

The vineyards grew optimally and grapes ripened later than usual. Initial analyses are decent, indicating promising wine quality.

PRODUCTION

The 2021 crop was consistently two to three weeks later than usual, from the start, and larger than the previous year. This can largely be attributed to sufficient irrigation water and winter rainfall that could leach saline soils, accompanied by a moderate season with sufficient vegetative growth and fruit set. Both white and red cultivars achieved good yields.



CLIMATE AND VITICULTURAL TRENDS

Disease pressure was low throughout the post-harvest period, with limited downy mildew and powdery mildew occurring due to low rainfall throughout autumn. The rainfall was approximately half the long-term average for this period. The vines therefore maintained their leaves much longer, which ensured sufficient reserve accumulation.

Above-average rainfall occurred during the winter – approximately 25% more than the long-term average and almost four times more than the previous winter – which resulted in natural and sown cover crops performing satisfactorily. The Robertson region also experienced an above-average cold winter. The maximum temperatures were slightly higher than the long-term average, but minimum temperatures were much lower than the long-term average, which led to below-average temperatures. Four good snowfalls were observed on the Langeberg Mountains, which contributed to sufficient accumulation of cold units to adequately break dormancy. It was therefore not necessary to use dormancy-breaking agents.

Spring was cooler than usual, with the first vines budding early, but after sudden cold weather conditions bud break was delayed by up to approximately 10 days. As expected after the above-average cool weather, vineyards generally budded evenly, but unanticipated cold weather conditions later in the season contributed to uneven growth. Initial shoot growth was slow due to low soil and air temperatures, and flowering and fruit set were also delayed by two weeks. Although fruit set was good, it was uneven in places. As temperatures increased from mid-November, and because sufficient irrigation water was available,



vineyards grew vigorously and additional canopy management actions were needed.

Although persistent but light winds occurred during this time, there was no actual wind damage recorded. Véraison occurred two weeks later than usual and evenness fluctuated significantly between blocks. Rainfall during spring was slightly below the long-term average.

Sustained cooler temperatures in summer resulted in delayed ripening by roughly two to three weeks later than usual. As it didn't rain much during summer, the harvest period was not disrupted. Vineyards were harvested according to the usual order, with the exception of certain younger Cabernet Sauvignon blocks ripening before the Shiraz. However, Shiraz caught up quickly and harvest still finished with Cabernet Sauvignon as usual.



GENERAL REMARKS

The vineyards' initial growth was slow due to cold winter and spring temperatures, but growth picked up quickly and was generally vigorous due to adequate irrigation water and moderate weather conditions in summer. Due to the vigorous growth, many second set bunches developed in Cabernet Sauvignon and Ruby Cabernet blocks, which had to be removed before the harvest could proceed.

Although limited rot occurred early in the season, rot issues among some cultivars became prevalent as the season progressed, especially Chenin Blanc. Powdery mildew pressure

was high and occurred widespread, especially among Chenin Blanc, Chardonnay, Muscadel and Pinotage, despite complete and intensive spray programmes. Downy mildew occurred in some places, but did not result in crop losses. Weed pressure was also high despite a dry summer.

Temperatures were moderate throughout the season, with the exception of a heat wave that occurred in early February. It did, however, not result in sunburn damage, which can be attributed to adequate irrigation water and vigorous canopies. Despite the heat wave, average temperatures for February were still below the long-term average.

The Brandvlei Dam's levels were consistently higher compared to the previous season and producers had sufficient irrigation water, with the exception of some producers who depend on run-off water from the mountain.



GRAPE AND WINE QUALITY

The harvest period proceeded smoothly thanks to favourable weather conditions and few rainy days. Grape analyses were excellent with higher than normal acidity and low pHs. Because some grapes required extended hang time to accumulate sufficient sugar levels, acidity decreased towards the end of the season. Juice recoveries exceed that of 2020, thanks to larger grape berries. Red cultivars display excellent colour with acceptable structure and soft tannins, and the white cultivars exhibit beautiful fruit aromas. The overall quality of the 2021 vintage seems promising as a result of the cooler season.



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STELLENBOSCH

“The Stellenbosch region overcame several challenges – including the consequences of the Covid-19 sales restrictions and massive wildfires during the harvest period – to produce an average-sized crop of excellent quality”, says Etienne Terblanche, Vinpro’s viticulturist for the Stellenbosch region.

Cool, wet climatic conditions created an opportunity to replenish water reserves, although it also kept producers on their toes regarding vineyard management. At this stage, the region expects high quality wines with good aging potential. The Stellenbosch region includes Stellenbosch, Constantia and Durbanville.

PRODUCTION

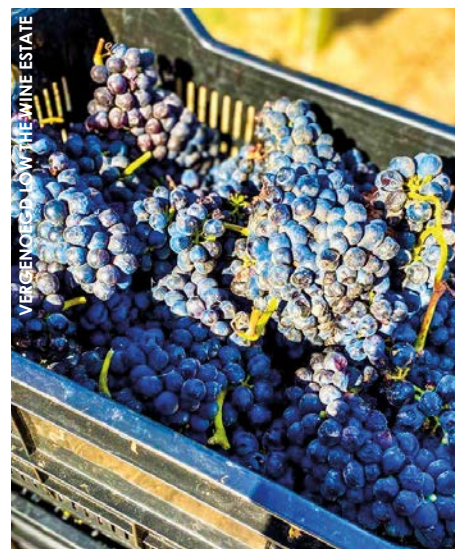
The overall yield is expected to be smaller than the above-average 2020 crop, but still larger than in 2019. Despite good winter rainfall, the post-harvest period was hot and dry, which could hamper reserve build-up, especially in the early ripening cultivars such as Pinotage, Pinot Noir and Chardonnay. Simultaneously, these cultivars had to suffer an exceptionally cool and wet spring without the normal reserve levels, which could have had a further negative effect on early bunch development.

Conversely, the middle to late ripening cultivars such as Sauvignon Blanc, Chenin Blanc and Cabernet Sauvignon did well and to some extent buffered the early cultivars' production losses. Blocks were harvested timely and the yield was often lower than the initial estimate, possibly due to smaller berry sizes compared to the previous season.

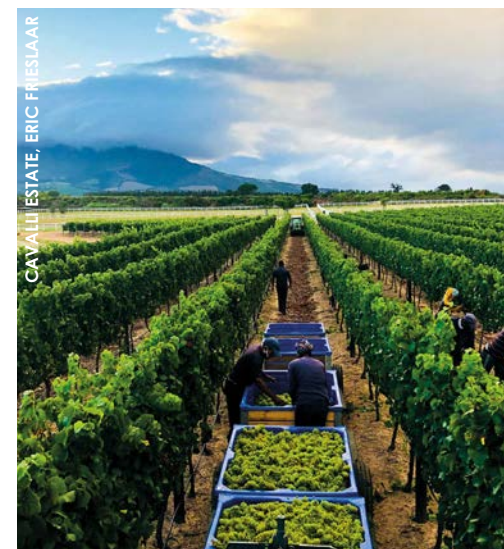


CLIMATE AND VITICULTURAL TRENDS

The post-harvest period was characterised by exceptionally hot and dry conditions, which led to early leaf fall, especially in early ripening cultivars. The majority of producers who wanted to apply supplementary irrigation had access to water reserves for a once-off post-harvest irrigation, although sustained dry conditions required additional irrigation. Consequently, the build-up of carbohydrate reserves was possibly suboptimal, especially in cultivars such as Pinotage, Pinot



VERGENOTER LOW THE WINE ESTATE



CAVALLI ESTATE, ERIC FRIESLAAR

**“REGULAR COLD FRONTS
BROUGHT ABOUT MORE PRECIPITATION
THAN THE PREVIOUS SEASON.”**

Noir and Chardonnay. The first significant rainfall only occurred towards the end of May, which delayed the establishment of cover crops and subsequently also limited their biomass and weed suppression capacity.

Although the winter rainfall started late, regular cold fronts contributed almost 100 mm more precipitation than in the previous season. Soil profiles were well saturated and farm dams returned to pre-drought levels (from 2015 to 2018). Although winter was not as cold as the previous season, the build-up of cold units was sufficient for successful breaking of dormancy. A transient warm period at the end of July caught some of the early ripening cultivars on the coast (Faure) off guard, leading to early bud break. After the previous drought and associated dormancy

challenges, dormancy-breaking agents were commonly applied, especially on Chardonnay vineyards.

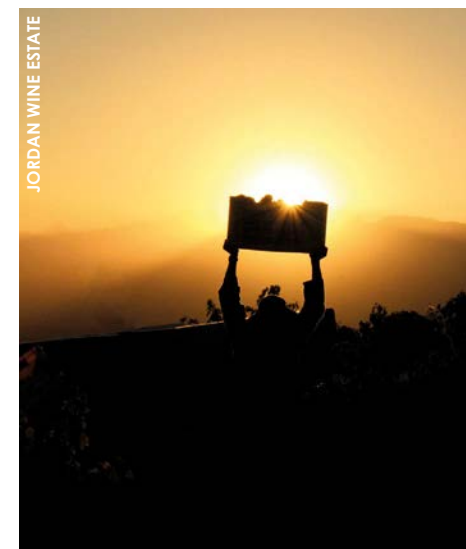
The subsequent budding period was particularly cool and wet, and low soil temperatures delayed bud break by up to 14 days. Bud break and initial shoot growth in sensitive cultivars such as Shiraz were particularly uneven, while later cultivars such as Cabernet Sauvignon developed evenly. Despite sustained cool conditions, the flowering and fruit set periods were moderate and ideal, with no extreme conditions such as sudden temperature fluctuations, gale-force winds or frequent rain showers. The moderate growing season with loaded soil profiles resulted in lush canopies and producers had to act swiftly to complete canopy actions within the optimal window period. Growing conditions stimulated strong lateral development in bunch zones and additional actions were needed to achieve sufficient bunch exposure (especially in red cultivars).

Véraison followed the seasonal trend and was generally up to 14 days later than the previous season. Initially, véraison was uneven and there were concerns about uneven ripening, but it later became apparent that cooler daytime temperatures simply prolonged the process. Nevertheless, producers still applied good crop control and removed outlier green bunches in the high quality red cultivars.

Ripening was consistently about 10-14 days later than the previous year, and the ripening period was moderate with only 8 hours above 35°C compared to the previous year's 41 hours above 35°C. Minimal precipitation occurred during this time, with the exception of about 40 mm of rain on 10 March 2021. Cellars experienced few logistical and congestion issues, and cultivars were harvested according to their usual order, with the possible exception of Pinotage and Shiraz that exhibited prolonged ripening, and Cabernet Sauvignon which was harvested earlier in many cases.



KLEIN WELMOED LORIANE GROBBELAAR



JORDAN WINE ESTATE



GENERAL REMARKS

The cool, humid conditions led to high disease pressure throughout the season. Downy mildew and powdery mildew were problematic and additional input was required to combat those successfully. Sensitive cultivars such as Grenache, Pinotage and Cabernet Sauvignon were particularly affected by the downy mildew. Frequent rain showers, with a sub-optimal cover crop density, also necessitated additional weed control. Producers thus had a smaller window period to complete more actions.

Despite abundant water supplies, vineyards' water demand was lower than the previous year and producers started irrigating up to a month later than usual. One of the greatest threats to the 2021 season was wildfires in the Jonkershoek and Hottentots-Holland Mountains in early March. Although the vineyards suffered minimal physical damage, there are concerns about possible smoke taint. At this early stage, fortunately, there is little talk of negative influence among producers.



GRAPE AND WINE QUALITY

Although recoveries are lower, the grape composition and preliminary wine quality of the 2021 vintage shows promise.

White cultivars are very aromatic and display exceptionally low pH and high acidity, with moderate alcohol levels. This year's Sauvignon Blanc in particular is excelling in terms of quality. High levels of both tartaric and malic acid have been reported and are mainly due to the cool and moderate conditions that prevailed from bud break to harvest time. The YANs were

consistently higher than expected and significantly fewer yeast nutrient additions were needed.

In spite of the cooler conditions, the red cultivars have generally achieved ideal sugar and alcohol levels, with lower pHs and higher acidity than in recent seasons. The flavours and fruit concentrations are particularly noticeable, even for late ripening Cabernet Sauvignon, which was harvested after the rainfall in early March. The tannin structure is fine, while colour extraction was excellent. Winemakers are excited about the product in the cellar.



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SWARTLAND

“In the Swartland region, the 2021 vintage will be remembered for moderate weather conditions that slowed ripening,” says Hanno van Schalkwyk, Vinpro’s viticulturist for the Swartland region. “Due to excellent grape quality, consumers can look forward to a vintage with excellent wine quality.”



Commencement of the harvest period was delayed, which led to uneven grape ripening, and producers therefore had to apply careful crop control and patiently wait for grapes to achieve optimal and even ripeness.

PRODUCTION

Although there have been differences between farms, the size of the 2021 crop is slightly larger than in 2020. In terms of cultivars, the yields of Chardonnay and older Chenin Blanc blocks were smaller, but Sauvignon Blanc, Pinotage and Cabernet Sauvignon produced better crops compared to the previous season. Berry size was fairly normal due to adequate water supply, and cellars were satisfied with juice recovery.



CLIMATE AND VITICULTURAL TRENDS

The post-harvest period in the Swartland region was rather hot, which, together with the previous season's early harvest, resulted in vines thriving and retaining their leaves for longer. This ensured that the active leaves could

build up sufficient reserves for the next season. Producers were able to sow their cover crops early, by the end of April. Welcome rain showers occurred in April and May, which allowed cover crops to germinate and grow optimally.

The winter months were characterised by temperature fluctuations. Accumulation of cold units increased satisfactorily from the beginning of June, but decreased in July due to warmer weather conditions. As a result of these higher maximum temperatures in July, some shoots began budding at their tips. Temperatures dropped again in August and cold units increased substantially. Nonetheless, it can be assumed that the overall conditions were sufficient to satisfy the vineyard's cold unit requirements.

This season's winter rainfall was highest compared to the past five years. Although it was still below the long-term average, producers were able to sigh with relief after the recent drought. The winter rainfall period also lasted longer than normal and the region experienced favourable conditions in August, with snowfall occurring on the surrounding mountains. Farm dam levels were above average and the groundwater was replenished to optimal plant available water capacity.

Although temperatures began to rise in September, frequent cold fronts still brought extraordinary cold and rainy weather conditions. It was definitely cooler than the previous season and budding generally occurred 5 to 7 days later than usual. Bud break was mostly even, with the exception of earlier blocks that were somewhat uneven. Widespread rain showers occurred at onset of the flowering period, which contributed to optimal flowering and fruit set. At pea size development stage, however, unevenness was noticed within and between bunches.

During November and December, strong vegetative growth took place due to adequate water supply. Producers had to sucker and tip more than usual to control growth. Véraison occurred fairly late and slowly, and in the case of the premium blocks, more grape bunches were discarded than usual to ensure an even harvest.

Weather conditions during harvest were moderate, with no severe heat waves occurring. Vineyards' canopies remained consistent throughout and limited symptoms of water stress were observed. Ripening was 10 to 14 days later than usual and progressed slowly. Cellars experienced less pressure during harvest and producers had to wait for grapes to reach the desired degree of ripeness. All cultivars were harvested according to their normal ripening times.



GENERAL REMARKS

Following rain showers in early November, downy mildew disease pressure was moderately high and minor, sporadic damage to leaves and bunches was observed. It did however not significantly affect overall yield. Powdery mildew occurred fairly late in the season, especially among Chardonnay, Chenin Blanc and Cabernet Sauvignon cultivars, of which the berries and stems were affected. Nonetheless, the grapes were generally healthy.



GRAPE AND WINE QUALITY

Initial grape analyses were acceptable, with high acidity and low pH, and the red cultivars' colour development seemed promising. However, acidity decreased in the second half of the harvest period.

According to early indications, 2021 is an exceptional vintage in terms of wine quality, with Chenin Blanc and Sauvignon Blanc displaying distinct cultivar characteristics. At this stage, red wines are particularly outstanding with good fruit concentration, elegance and colour.

“THE RED WINES ARE PARTICULARLY OUTSTANDING.”

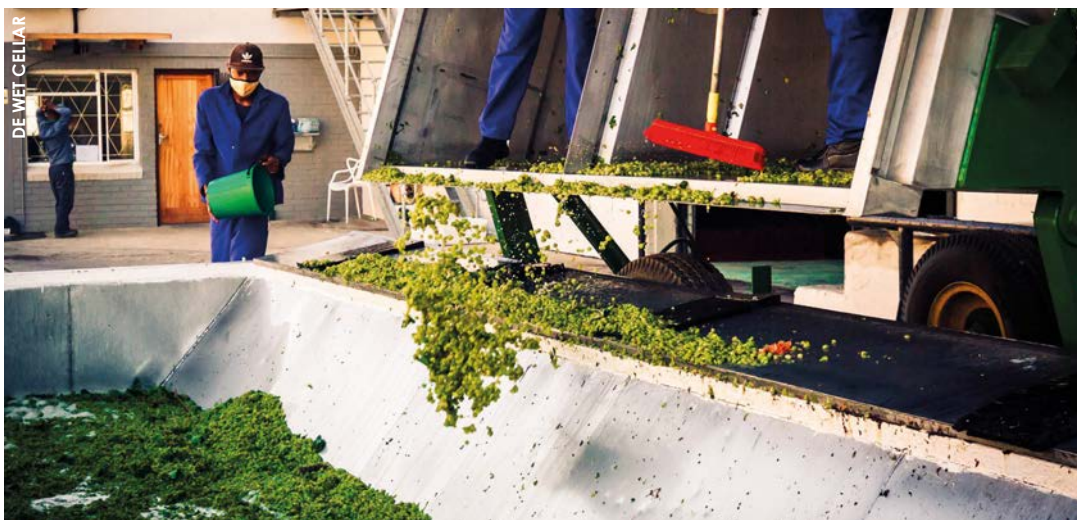


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WORCESTER

“The Worcester region experienced a good 2021 wine grape season, characterised by a late harvest, great yields and pressure on cellar space,” says Pierre Snyman, Vinpro’s viticulturist in the Worcester region.



This was one of the latest harvests recorded in this region, while Covid-19 related restrictions on liquor sales in the previous year affected processing and storage space in cellars, as well as the harvesting process.

PRODUCTION

The Worcester region realised a larger crop than in 2020. The yields of most cultivars were higher, with Sauvignon Blanc, Chenin Blanc and Colombar vineyards performing particularly well. The larger crop can be attributed to a number of factors, including the fact that the vineyards showed no more signs of transfer effects of the drought, together with sufficient accumulation of cold units and higher winter rainfall.



CLIMATE AND VITICULTURAL TRENDS

Leaf fall occurred quite late due to a temperate climate. This ensured that vineyards could achieve optimal reserve levels and that vineyards could be

adequately ripened. Dams in the region were fuller than the corresponding time the previous year and timely post-harvest fertilization could be applied.

Winter arrived early in June and cold units accumulated rapidly until the end of August. Cold units were remarkably high – in some cases even double that of the previous winter – and no difficulties were encountered during the breaking of dormancy. The winter rainfall was also about double that of the previous winter, and the Kwaggaskloof and Keerom Dams were 60% and 53% full respectively.

Bud break was up to (and even more than) 14 days late – a trend that would eventually continue throughout the season until harvest, probably due to the cooler climatic conditions. Heat units recorded at weather stations such as Meerlust indicate that the season, from April to the end of December 2020, was much cooler than the previous year. Bud break itself was good and even, as expected. Vineyards flowered 14 days later than usual and fruit set was reasonable despite windy and cool conditions. The cooler weather placed an initial damper on shoot

growth and berry development. Windy conditions, experienced throughout the season, stimulated strong lateral development in bunch zones. Véraison was fast, good and even.

Heat units caught up with previous years' averages by the end of December, although this did not affect the ripening period. Early cultivars such as Chenin Blanc, Sauvignon Blanc and Chardonnay reached optimal ripeness 14 days (or more) later than the previous season.

Vineyards also presented uneven ripening patterns this year, both within the same blocks and between cultivars. Some Pinotage blocks were only harvested towards the end of the season, while Merlot and Cabernet Sauvignon were the last cultivars to be harvested.



GENERAL REMARKS

The low-lying areas of the Worcester region suffered significant damage due to spring frosts, of which Chenin Blanc, Colombar and Pinotage vineyards were affected most severely.

Over the course of the growing season vineyards grew quite lush, but came to a standstill in the first 10 days of January. This could possibly be attributed to water stress, of which symptoms were present in several vineyards. Accurate sampling has been a major challenge this year, which is becoming a general issue. To overcome this, berry samples were replaced with bunch samples. This year, heat waves were unproblematic during the harvest period and weather conditions were moderate.

Rainfall in January led to a sharp increase in weed pressure. Powdery mildew was a major concern, especially in Chenin Blanc and Colombar vineyards. The season was late and producers probably sprayed one chemical fungicide spray too few for this. The powdery mildew, in conjunction with rain showers in January, led to Botrytis infections. A new pest called Lobesia – a moth that damages grapes – also contributed to great sporadic losses.

Water resources (dams, reservoirs and soil water) improved, compared to 2020. The Kwaggaskloof Dam was 34% full by the end of April this year compared to 21% at the same time in 2020, and the Keerom Dam was 25% full compared to 2% in 2020.



GRAPE AND WINE QUALITY

The early ripening cultivars were harvested with high acidity and low pH analyses, and excellent wines are expected. The prolonged ripening period and pressure on cellar capacity meant that the pH and acidity of the vineyards, that were last to be harvested, were problematic.

**“HEAT UNITS CAUGHT UP WITH
PREVIOUS YEARS' AVERAGES BY
THE END OF DECEMBER.”**



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