FIVS & OIV ENGAGEMENT

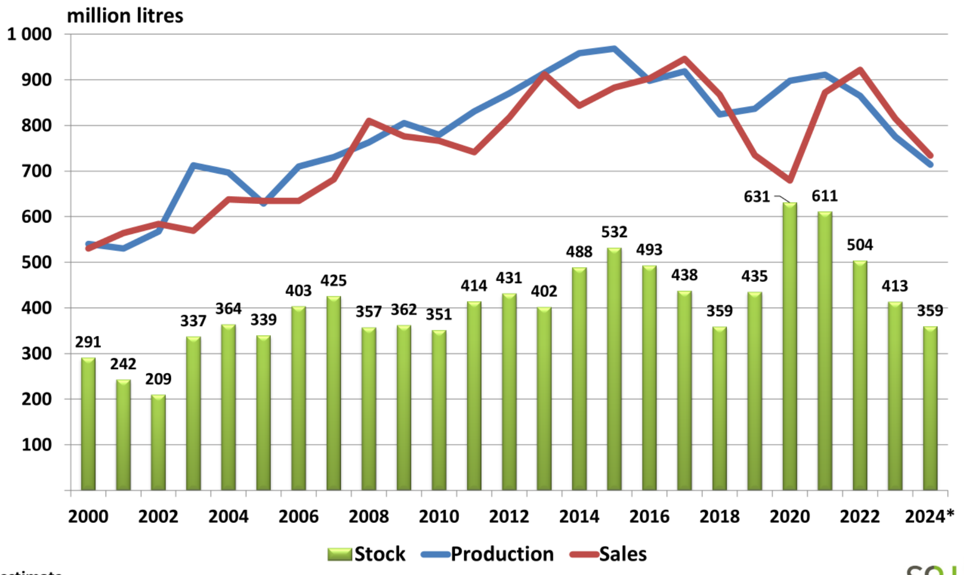
(CHRISTO CONRADIE - 7 OCTOBER 2024)

SOUTH AFRICA WINE

discover diversity in a glass

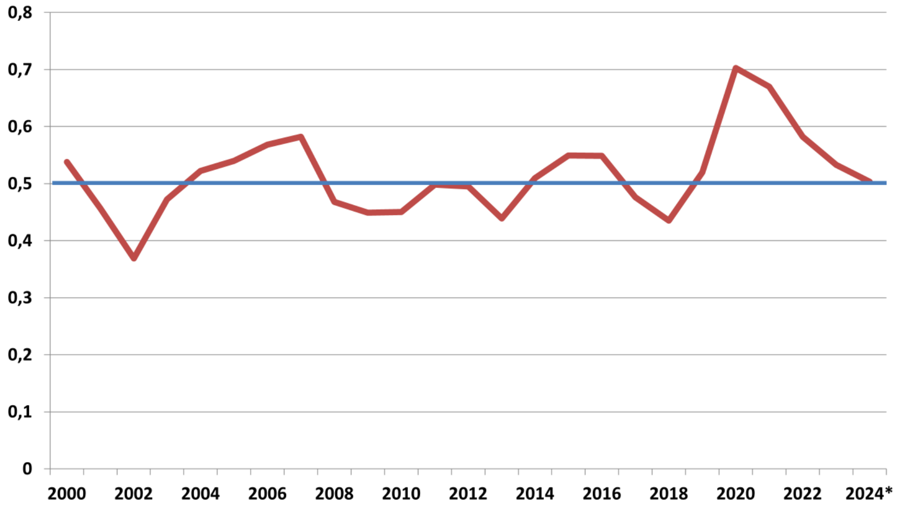
#sawine

WINE – PRODUCTION, SALES AND STOCK



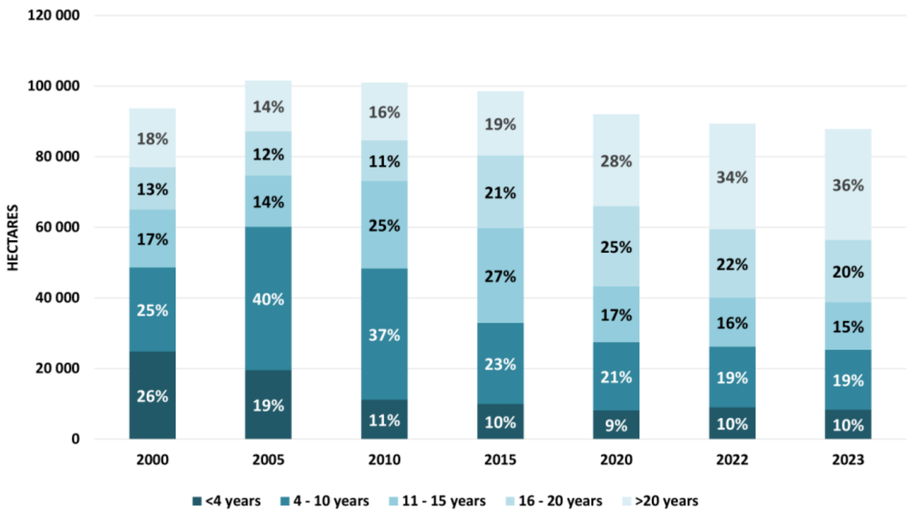
* estimate

STOCK TO SALES RATIO



* estimate

TOTAL - AGE DISTRIBUTION



NEW PLANTINGS PER CULTIVAR

2017	2018	2019	2020	2021	2022	2023
CHENIN BLANC 220	SAUVIGNON BLANC 337	CHENIN BLANC 323	CHENIN BLANC 397	CHENIN BLANC 152	SAUVIGNON BLANC 268	SAUVIGNON BLANC 318
SAUVIGNON BLANC 177	CHENIN BLANC 241	SAUVIGNON BLANC 273	COLOMBAR 220	CABERNET SAUVIGNON 141	SHIRAZ 208	CHARDONNAY 215
COLOMBAR 138	COLOMBAR 176	CABERNET SAUVIGNON 242	SAUVIGNON BLANC 213	PINOTAGE 127	CHENIN BLANC 204	CHENIN BLANC 180
CHARDONNAY 125	CABERNET SAUVIGNON 151	CHARDONNAY 220	PINOTAGE 161	SAUVIGNON BLANC 112	CHARDONNAY 202	PINOTAGE 137
CABERNET SAUVIGNON 121	CHARDONNAY 142	COLOMBAR 170	CHARDONNAY 149	CHARDONNAY 110	CABERNET SAUVIGNON 179	CABERNET SAUVIGNON 107
SHIRAZ 101	SHIRAZ 90	PINOTAGE 120	SHIRAZ 144	COLOMBAR 105	PINOTAGE 170	PINOTAGE 137
PINOTAGE 54	MERLOT 71	MERLOT 111	MERLOT 116	SHIRAZ 98	MERLOT 131	MERLOT 107
PINOT NOIR 32	PINOTAGE 39	SHIRAZ 97	CABERNET SAUVIGNON 109	MERLOT 85	RUBY CABERNET 72	SHIRAZ 85
DURIF 27	CINSAUT 34	MALBEC 73	MALBEC 82	DURIF 43	COLOMBAR 72	PINOT GRIS 61

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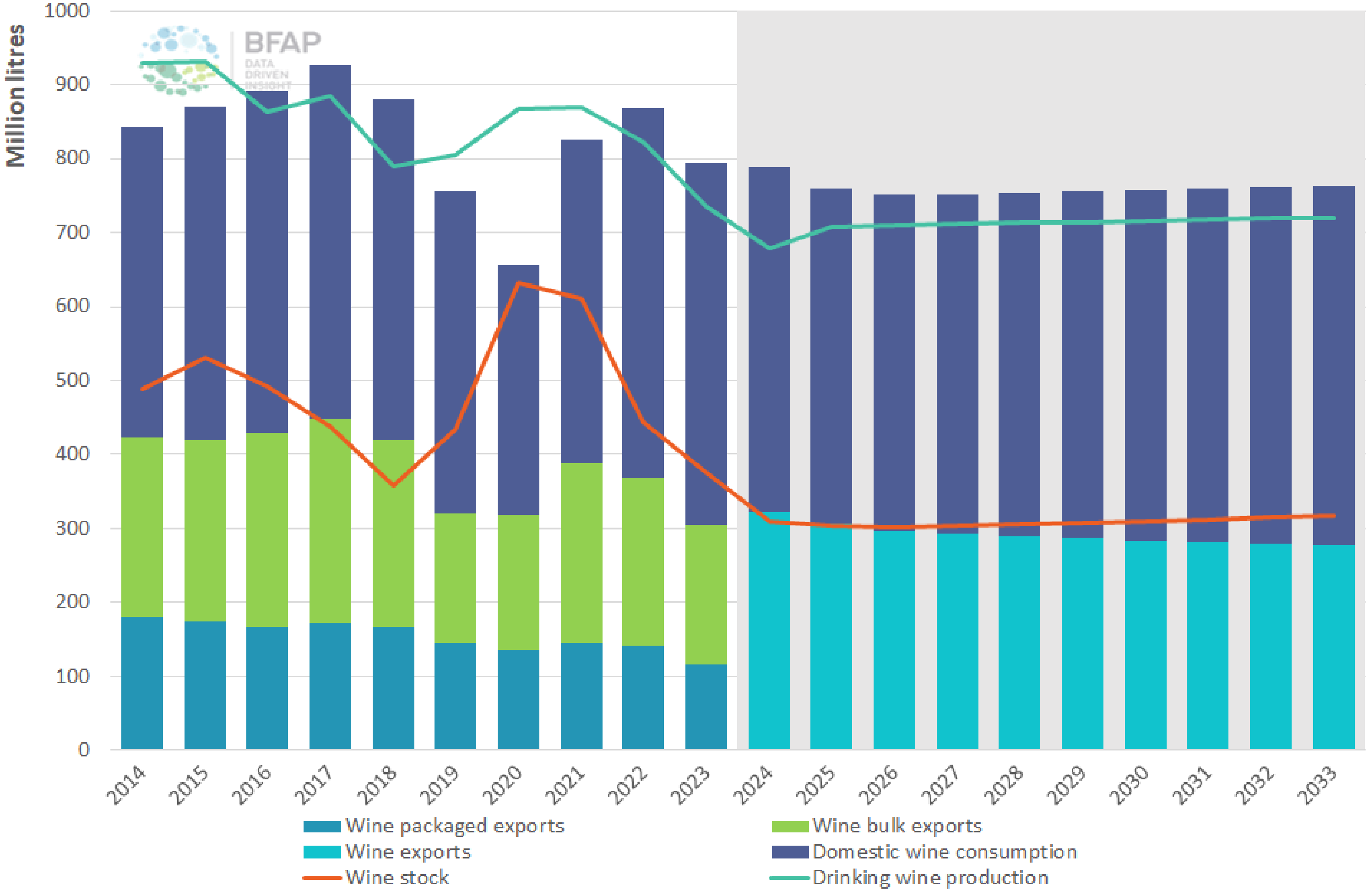
FORECAST – PRODUCTION, SALES AND STOCK



1. Projected **stabilisatio**n of **wine production volume** at a new norm below the historic average aligns with a decline in wine grape production due to continued uprooting.

2. Export volumes are projected to **remain constrained** – an average annual decline of 1.3% from 2023 to 2033.

3. Together with the weakening of the Rand, **lower stock levels** and stable domestic consumption levels in the lower price band, a **smaller component** is projected to be exported but at **higher prices**.

Pockets of opportunity require a more rapid shift to premium categories of wine for the domestic and export markets. Business as usual will result in stagnation unless more value can be unlocked from each tonne of grapes.

Source: BFAP Baseline July 2024

SAWIS

OUR MUST WIN BATTLES

- Protecting our licence to trade (illicit trade, health, excise) & grow domestic value
- Inclusive growth across the value chain
- Export enablement (logistics, market access, differentiation, premiumisation)
- Embrace sustainable practices including climate adaptation strategy
- Improve producer profitability & reinvestment
- Industry education and training (attract, develop & retain)
- Ensure access to resources (water, finance, packaging)

These are key to enabling growth and essential to the industry's sustainability.

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THANK YOU

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