



Wines of
**South
Africa**

welcome to our world of discovery

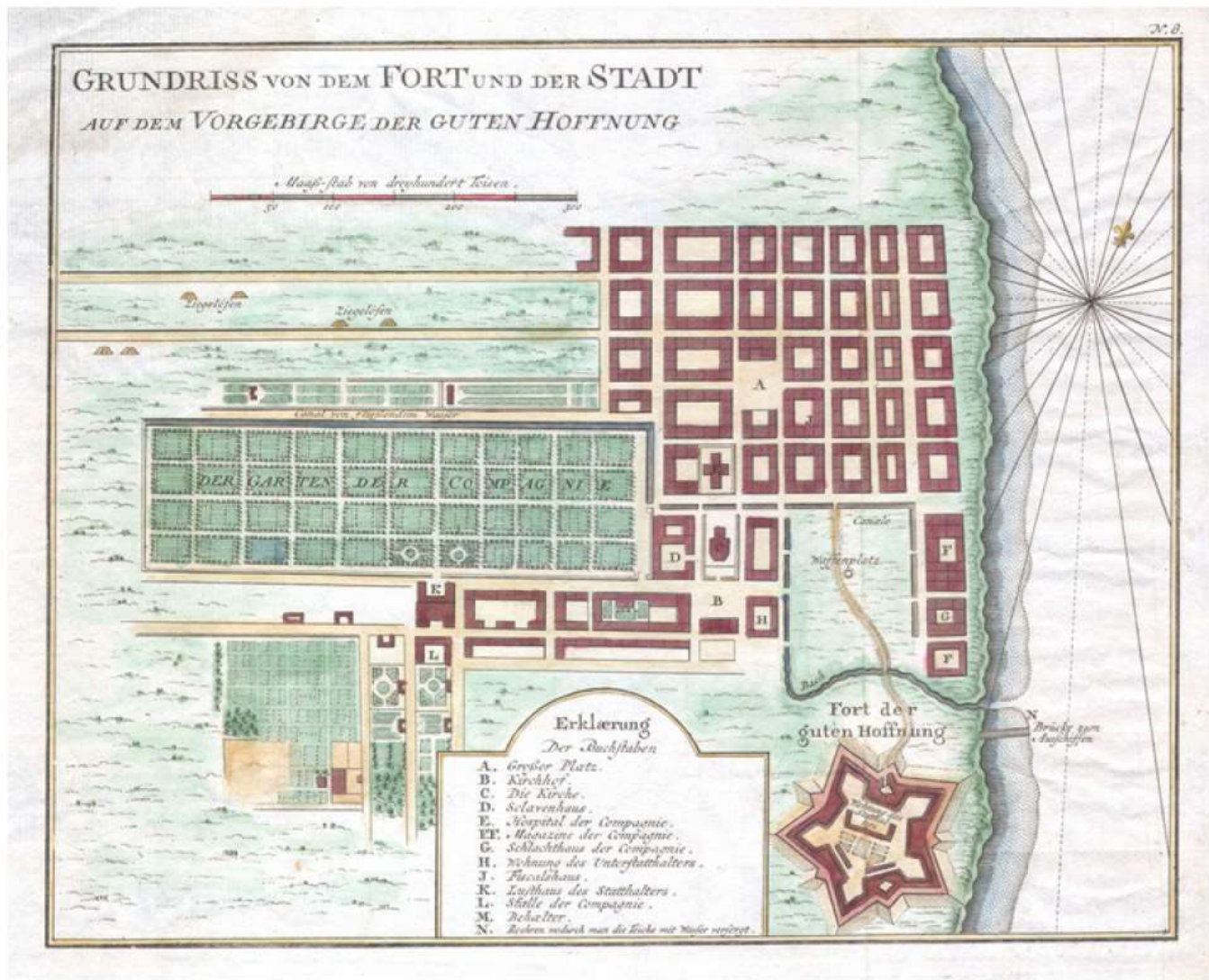


Africa
Canada
Germany
China
Hong Kong
Japan
Sweden
The Netherlands
UK
USA

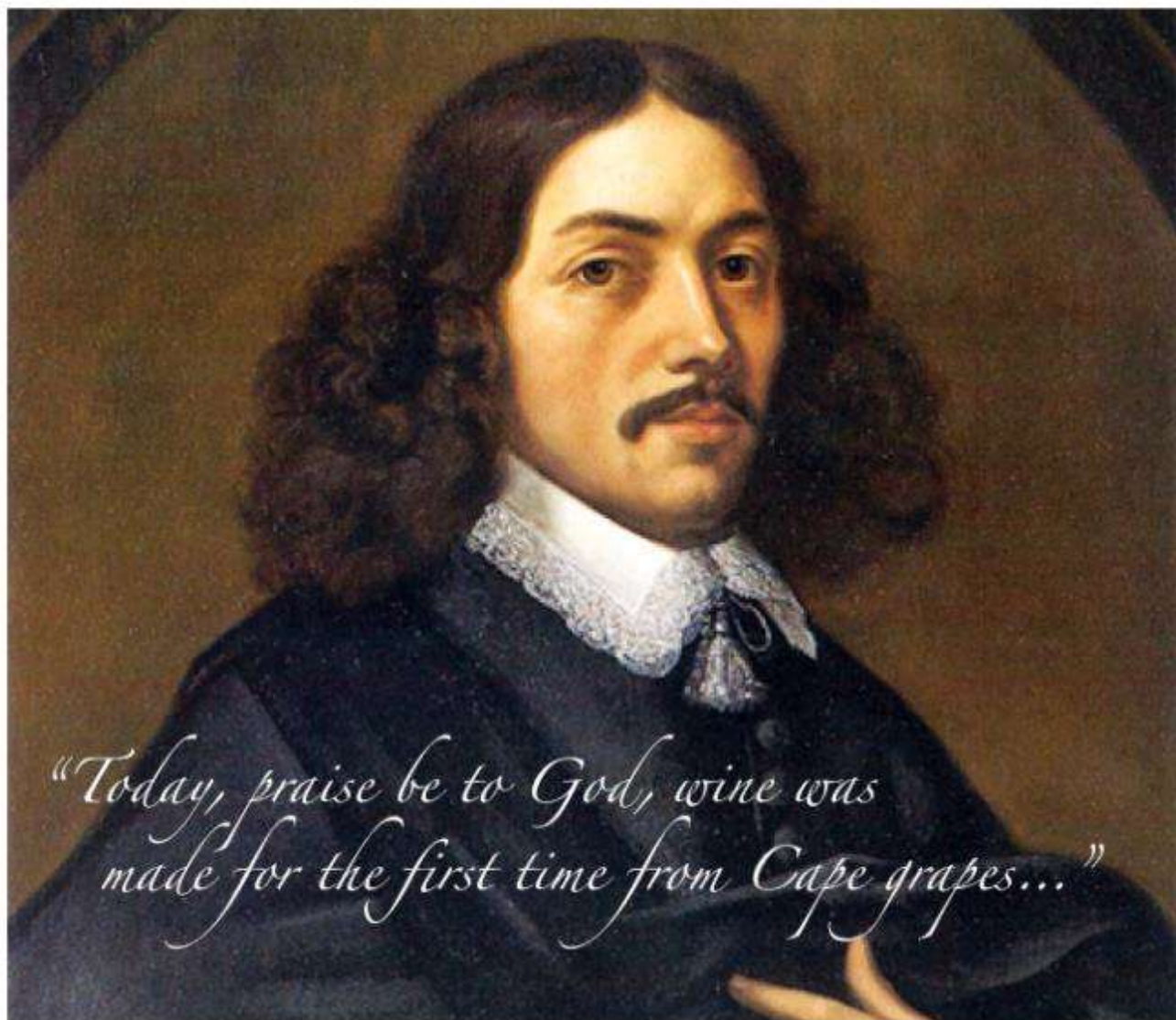
Markets
www.wosa.co.za



1652 – The Dutch East India Company established a refreshment station to provide for the ships en route to the spice trade in the East



1655 – Governor Jan van Riebeeck planted the first vines, imported from France, Spain and the Rhineland, in the Company Gardens



Jan van Riebeeck's famous diary entry of 2 February 1659



1688 – French Huguenots



Mid-1700s – Our wine was famous in the courts of Europe

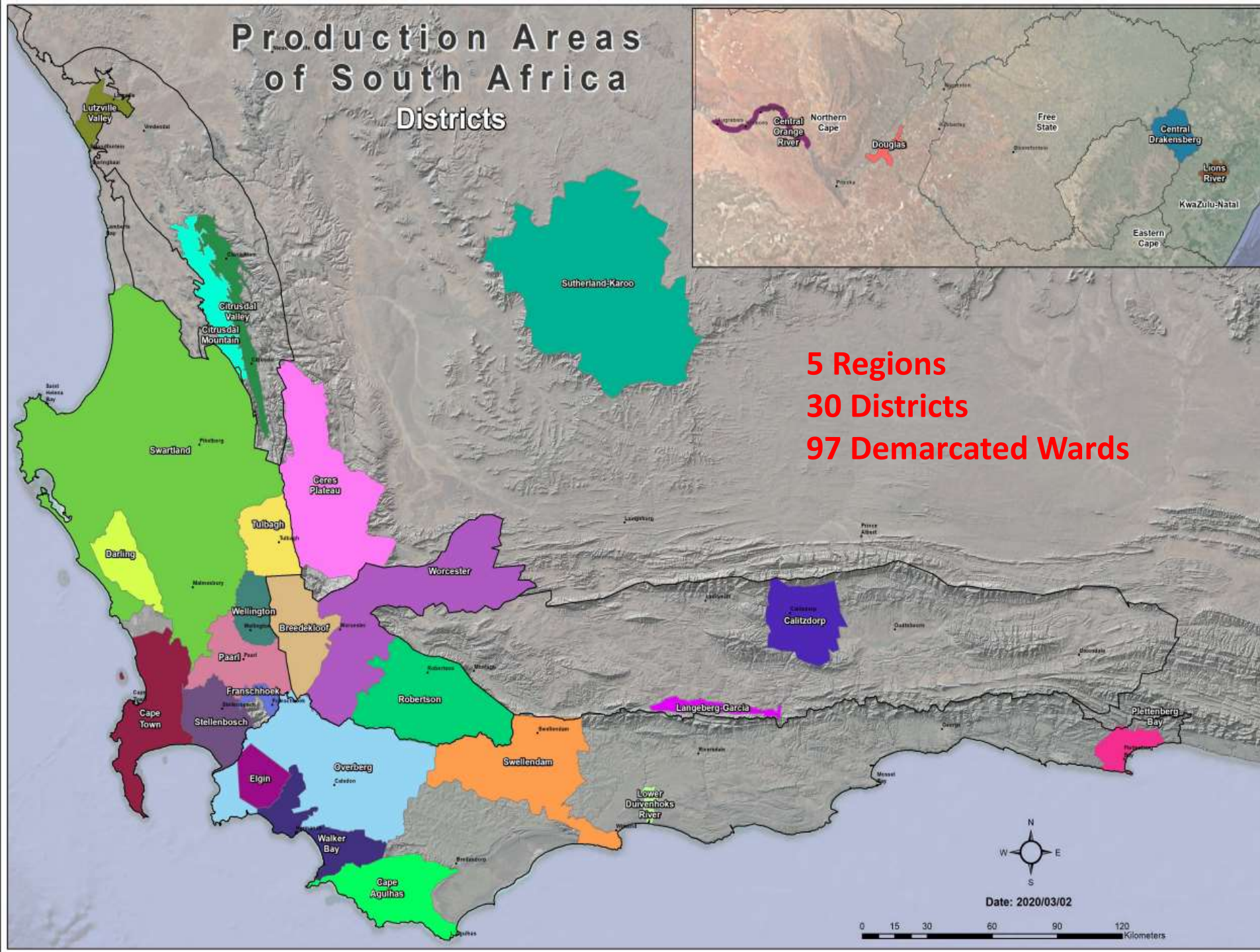


South Africa ranks as number nine in the overall volume production of wine

Production Areas of South Africa Districts



5 Regions
30 Districts
97 Demarcated Wards

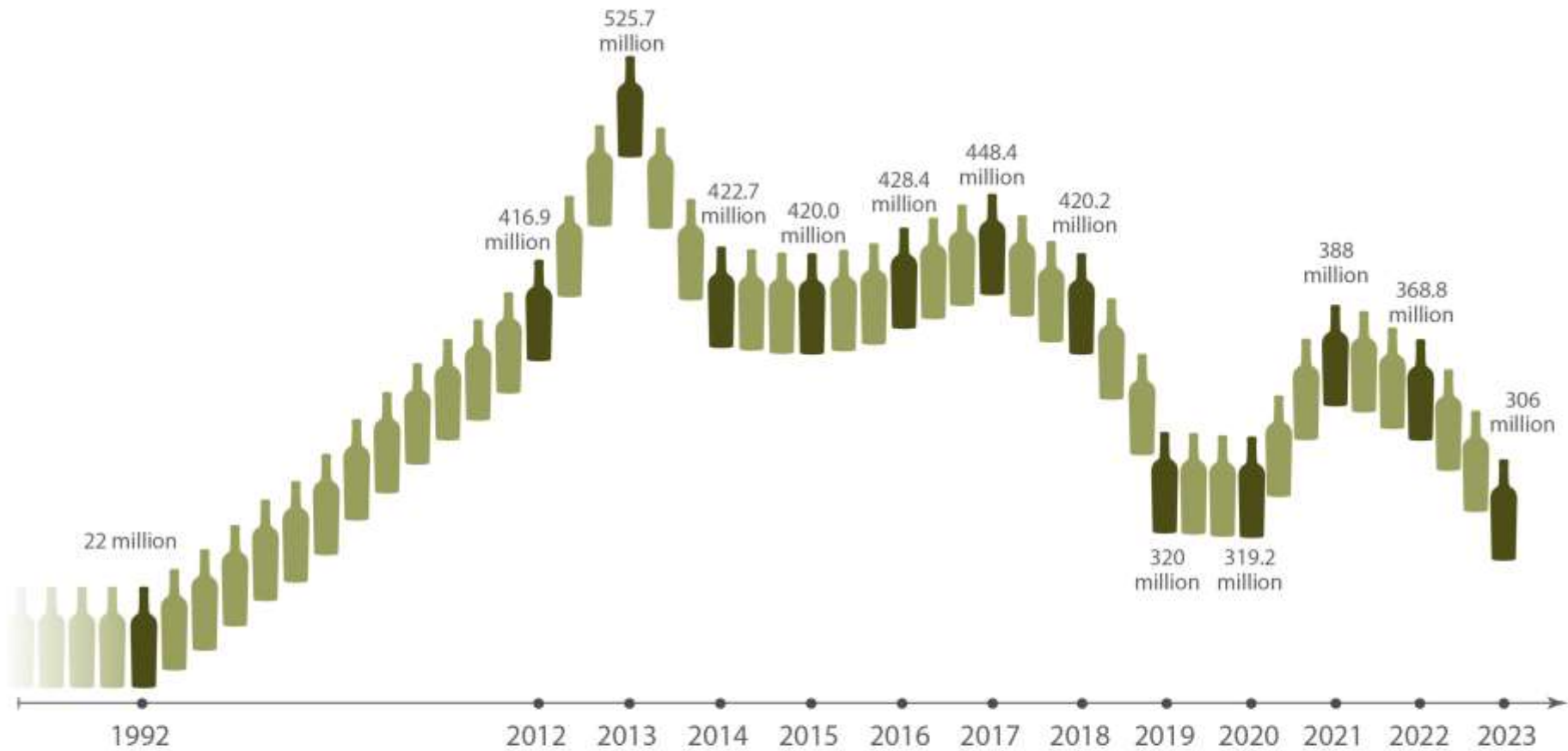




South Africa has the most Chenin Blanc plantings in the
world
16,485ha in 2022

A Taste of Pinotage





SOUTH AFRICAN WINE EXPORT REPORT 2023



TOTAL EXPORTS

R10 bn	\$540 m	306,3 m litres
+0.9%	-11.0%	-16.9%

* Total excludes Industrial wine 0.8 million litres - R5.8 m & \$0.3m

MARKETS BY VALUE

Country	R		\$	
United Kingdom	2.8 bn	+19%	152 m	+4%
Germany	950 m	-6%	51 m	-17%
The Netherlands	730 m	-3%	39 m	-15%
U.S.A.	707 m	-11%	38 m	-21%
Canada	509 m	-15%	27 m	-26%
Belgium	474 m	+36%	26 m	+20%
Sweden	441 m	+4%	24 m	-9%
Denmark	395 m	+9%	21 m	-5%
China	345 m	+2%	19 m	-9%
France	242 m	-16%	13 m	-25%
UAE	234 m	+1%	13 m	-10%
Japan	136 m	-13%	7 m	-23%
Hong Kong	37 m	-3%	2 m	-13%
African countries - Total	717 m	-12%	39 m	-22%

PACKAGED EXPORTS

R7.66 bn	\$414 m	117.1 m litres
+1.2%	-11.0%	-17.0%

MARKETS BY VALUE

Country	R		\$	
United Kingdom	2.0 bn	+17%	106 m	+3%
The Netherlands	720 m	-3%	39 m	-15%
U.S.A.	665 m	+4%	35 m	-8%
Germany	510 m	-9%	28 m	-20%
Canada	400 m	-7%	22 m	-18%
Sweden	392 m	+1%	21 m	-11%
China	319 m	+3%	17 m	-9%
Belgium	315 m	+27%	17 m	+12%
UAE	234 m	+1%	13 m	-10%
Japan	134 m	-12%	7 m	-23%
Denmark	128 m	-4%	7 m	-17%
France	66 m	-17%	4 m	-26%
Hong Kong	37 m	-3%	2 m	-13%
African countries - Total	668 m	-15%	36 m	-23%

BULK EXPORTS

R2.3 bn	\$125 m	189.2 m litres
-0.3%	-12.0%	-16.9%

MARKETS BY VALUE

Country	R		\$	
United Kingdom	844 m	+22%	45.5 m	+7%
Germany	439 m	-3%	23.7 m	-14%
Denmark	267 m	+17%	14.4 m	+2%
France	176 m	-16%	9.5 m	-25%
Belgium	159 m	+58%	8.6 m	+41%
Canada	109 m	-36%	6.0 m	-43%
U.S.A.	52 m	-69%	2.8 m	-71%
Sweden	49 m	+31%	2.7 m	+12%
Finland	28 m	-28%	1.5 m	-37%
China	26 m	-4%	1.4 m	-16%
Thailand	25 m	+35%	1.3 m	+19%
Japan	2 m	-31%	0.1 m	-40%
African countries - Total	49 m	+40%	2.6 m	+24%
Nigeria	21 m	+118%	1.0 m	+87%

TOTAL EXPORTS

MARKETS BY VOLUME

Country	million litres	
 United Kingdom	93.6	-3%
 Germany	49.4	-16%
 Belgium	18.1	+32%
 France	16.9	-25%
 Canada	16.7	-38%
 Denmark	14.7	-5%
 Sweden	12.8	-9%
 The Netherlands	12.4	-21%
 U.S.A.	12.1	-52%
 China	7.0	-18%
 UAE	4.3	-13%
 Japan	1.9	-15%
 Hong Kong	0.3	-11%
African countries - Total	19.1	-18%

PACKAGED EXPORTS

MARKETS BY VOLUME

Country	million litres	
 United Kingdom	28.6	-8%
 The Netherlands	11.6	-22%
 Sweden	7.9	-12%
 U.S.A.	7.5	-14%
 Germany	6.8	-27%
 Canada	5.5	-16%
 China	4.9	-21%
 UAE	4.3	-13%
 Belgium	4.3	+10%
 Russia	2.6	-53%
 Japan	1.7	-23%
 France	0.4	-30%
 Hong Kong	0.3	-11%
African countries - Total	15.4	-23%

BULK EXPORTS

MARKETS BY VOLUME

Country	million litres	
 United Kingdom	65.0	-1%
 Germany	42.6	-14%
 France	16.5	-25%
 Belgium	13.8	+41%
 Denmark	13.4	+0.3%
 Canada	11.2	-44%
 Sweden	4.9	-3%
 U.S.A.	4.6	-72%
 Finland	2.2	-27%
 China	2.2	-10%
 Thailand	1.9	+23%
 Japan	0.2	-41%
African countries - Total	3.7	+19%
 Nigeria	1.5	+52%



Wine Industry Ethical Trade Association (WIETA)



Black-owned brands

SUSTAINABLE WINE SOUTH AFRICA

By considering the consequences of how we grow and make our wine, we're not just making better wine, we're also making wine better.



IN 2022, 94.4% OF SOUTH AFRICAN PRODUCERS QUALIFIED TO USE THE SEAL ON ALL PACKAGED WINE.

*The seal may not be used on bulk export wine.



WWF'S CONSERVATION CHAMPIONS, an exclusive and hard-earned status, proudly use this striking sugarbird and protea logo on their wine bottles to demonstrate their dedication to the conservation of the Cape Floral Kingdom's unique biodiversity - home to over 9 500 different plant species, **70% of which occur nowhere else in the world.**

Fairtrade



South Africa is the largest producer and seller of Fairtrade wine globally...



Key Consumer Markets

- UK
- Sweden
- Germany



€6 million+ in Fairtrade Premium generated over past 5 years.



8% of all SA vineyard hectareage is Fairtrade certified (7200 ha)

7% of total SA wine grape production is Fairtrade certified. (90 000+ MT)

ECONOMIC VALUE OF WINE TOURISM IN SA 2022



Wine tourism represents

17,3%

of the total turnover of
wine cellars that
crush grapes



R9,3billion

contribution to
GDP



**9,174 to
11,102**

jobs created at
farm gate
depending on the
season.

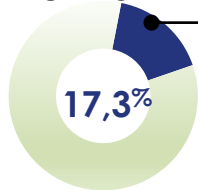


40,108

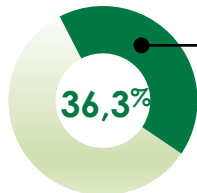
jobs created
directly, indirectly
and induced

ECONOMIC VALUE OF WINE TOURISM IN SA 2022

WINE TOURISM % OF TURNOVER

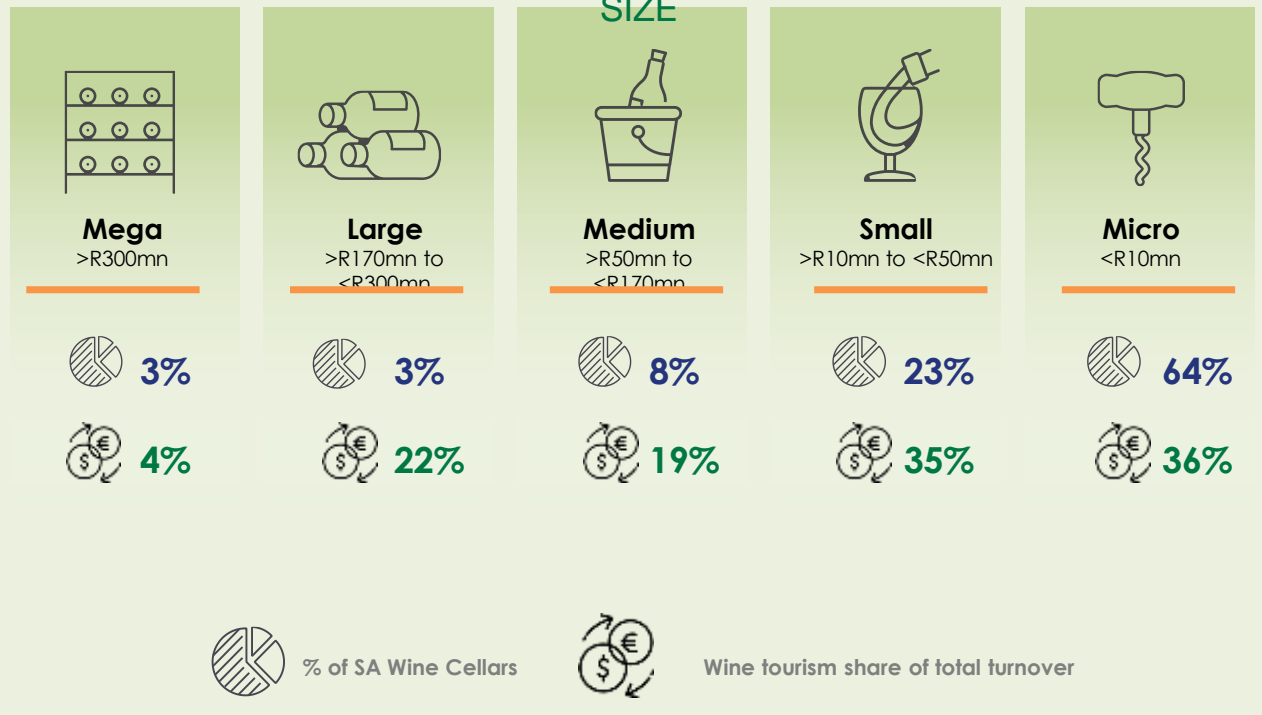


Wine tourism represents **17,3%** of the total turnover of wine cellars that crush grapes



Micro wine cellars (total turnover of less than R10mil) are most dependent on wine tourism with **36,3%** of their total turnover consisting of **wine tourism activities**

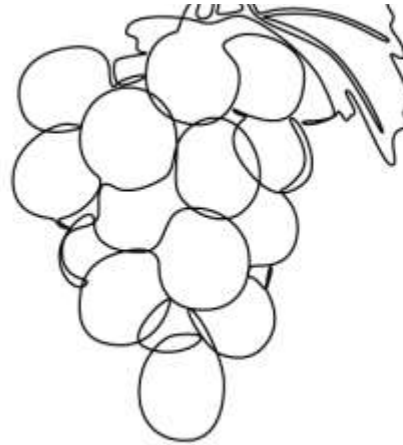
WINE TOURISM SHARE OF TOTAL TURNOVER - BY WINERY SIZE



SOUTH AFRICAN WINE

INDUSTRY OVERVIEW

↓ GRAPES CRUSHED
1.18 m
TONNES
-14.2%



↓ WINE PRODUCED
917 m
LITRES
-14.2%
755 m litres wine,
162 m litres other products

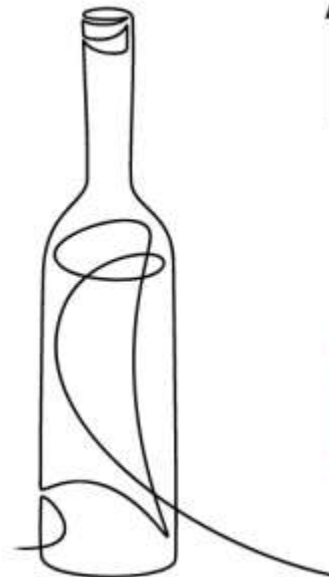
▶ WINE SALES 2022

↑ TOTAL SALES
R31.7 bn
+8.9%

EXPORTS 46% VOLUME

↓ VOLUME
386.4
MILLION LITRES
-5.2%

↓ VALUE
R10.0 bn
-2.8%



↑ **18 M**
GLASSES
of South African wine are enjoyed
world wide every day (125ml glass)

LOCAL 54% VOLUME

↑ VOLUME
453.4
MILLION LITRES
+15.8%

↑ VALUE
R21.8 bn
+15.3%

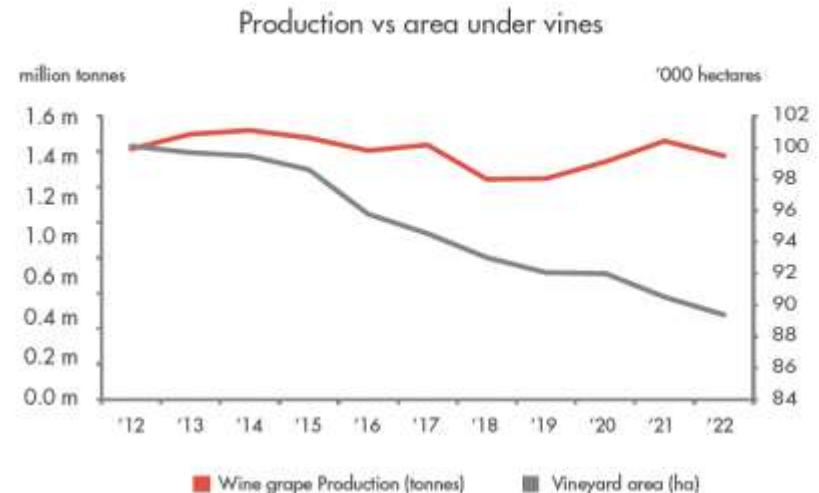
SOUTH AFRICAN WINE

INDUSTRY OVERVIEW

COMPOSITION 2012-2022

PRODUCERS
2 487
↓ -4.9%

CELLARS
524
↓ -2.2%

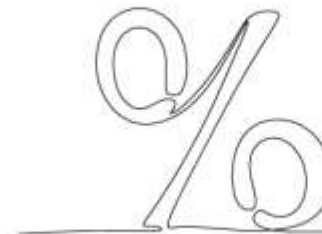


CONTRIBUTION 2019

55 bn
contribution to
GDP (1.1%)

269 096
employees in the
entire value-chain

80 183
farm and cellar
employees





Accolades

IWSC | Robert Parker | Wine Spectator | IWC | Decanter



Maryna@wosa.co.za