South Africa's dynamic wine industry is constantly evolving as it takes up the challenge of global competition. Our wines are exported and enjoyed worldwide.

Producers' income		R 4 820,7 million
State income		R 4 550,8 million
Turnover	(excluding tourism)	R19 164,0 million
Tourism turnover	(22.2% of total turnover)	R 4 263,0 million
Exports turnover	(excluding tourism)	R 6 272,0 million
Contribution to GDP	(excluding tourism)	R21 743,0 million

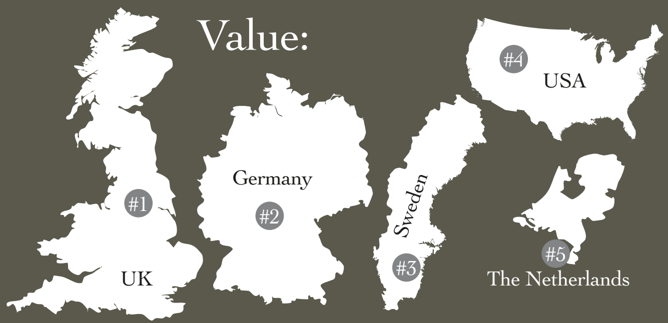
TOP FIVE export markets

% of total natural wine exports

Total top five **59,5%** Africa **3,2%**

Volume

Value:



Employment

275 606

people including tourism

Primary agriculture 25,0%
R1 million investment creates 5,54 jobs on the primary level (economy average 3,18)

Capital utilisation R49 768,0 million

Primary wine grape producers:

3 323

Packaged containers – domestic market

Glass	50,3%
Bag-in-Box	26,5%
Plastic	20,7%
Tetrapaks	1,9%
Foil Bags	0,7%

Exports as % of wine production 57,4%

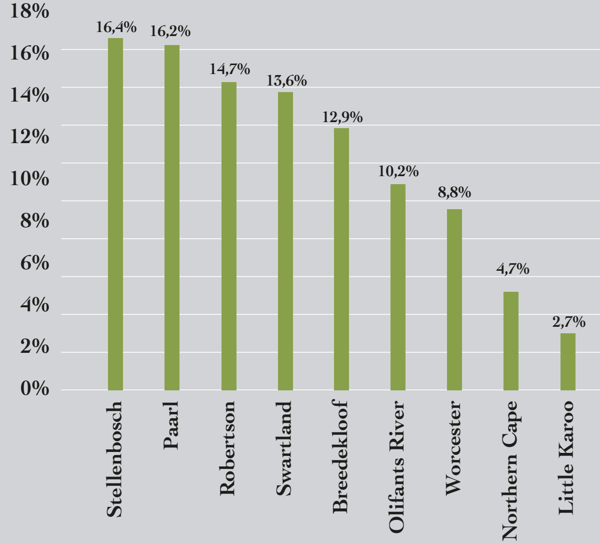
Bulk wine exported 66%

Wine exported in containers
Glass 77% / Bag-in-Box 23%

Growth in export volume of natural wine:
27% growth (2008 – 2013)

Natural wine exports	517,4 million litres
Packaged	175,6 million litres
Red	86,9 million litres
White	81,5 million litres
Rosé	7,1 million litres
Sparkling wine	7,9 million litres
Bulk	341,8 million litres
White	173,1 million litres
Red	111,0 million litres
Rosé	57,8 million litres

Distribution of wine grape vineyards (ha)
per wine region, 2013 (excluding Sultana)



1 498 702

tons total grape production

Red grape varieties 45,4%

White grape varieties 54,6%

Area under vines 99 680 hectares
(wine grape varieties only, including young vines)

Red varieties	45 217 hectares
Total plantings	955 hectares
Total uprooting	1 066 hectares
White varieties	54 463 hectares
Total plantings	1 032 hectares
Total uprooting	2 049 hectares

Age of vines

White varieties: 28,1% are older than 20 years
Red varieties: 24,9% are 10 years and younger
47,3% are between 11 and 15 years old

Top 6 varieties as % of total area

Chenin blanc	18,0 %
Cabernet Sauvignon	11,7 %
Colombar	11,7 %
Shiraz	10,5 %
Sauvignon blanc	9,4 %
Chardonnay	7,7 %

Total wine production

1 156,9
million litres

Wine for drinking purposes	915,5	million litres
Wine for brandy	42,0	million litres
Wine for distilling purposes	140,7	million litres
Grape juice concentrate and grape juice	58,7	million litres
Certified Wine of Origin	**588,3**	million litres
White varieties	163,2	million litres
Red varieties	120,3	million litres
Non-varietal	304,8	million litres
% of wine production	64,3	%

Domestic sales

Natural wine*	328,6	million litres
Fortified wine**	32,7	million litres
Sparkling wine	8,2	million litres
Brandy	33,3	million litres

* (including wine for grape-based liquors and alcoholic fruit beverages)
** (e.g. port and sherry)

Wine cellars 564

Producer cellars	50
Private wine cellars	493
Producing wholesalers	21

42,6% of the above-mentioned crush 100 tons or less

International comparisons

WINE PRODUCTION 2013 (not included juice and must)

France	4 201,6	million litres
Italy	4 490,0	million litres
Spain	4 270,0	million litres
USA	2 200,0	million litres
Argentina	1 498,4	million litres
Australia	1 245,6	million litres
Chile	1 280,0	million litres
South Africa	1 097,2	million litres

SOURCE: OIV

PER CAPITA CONSUMPTION DURING 2013

DISTILLED PRODUCTS	(litres AA)	WINE	(litres)
Russia	11,7	Portugal	42,5
Japan	8,2	Italy	36,9
USA	5,7	France	38,2
Hungary	4,1	Argentina	25,7
Chile	3,3	Australia	23,7
China	3,9	Chile	12,4
Australia	2,7	Croatia	15,2
South Africa	2,7	USA	9,7
Argentina	2,1	South Africa	7,3
		Japan	7,2

SOURCE: OIV

South Africa

1,7% of world vineyard area (12th)
4,0% world volume of wine production (9th)
2,7% of the world wine exports

SAWIS

SAWIS (SA Wine Industry Information & Systems) is a company not for gain. Under control and direction of the South African Wine industry, our main functions are:

- collection, prosessing and dissemination of industry information
- administration of the industry's Wine of Origin system

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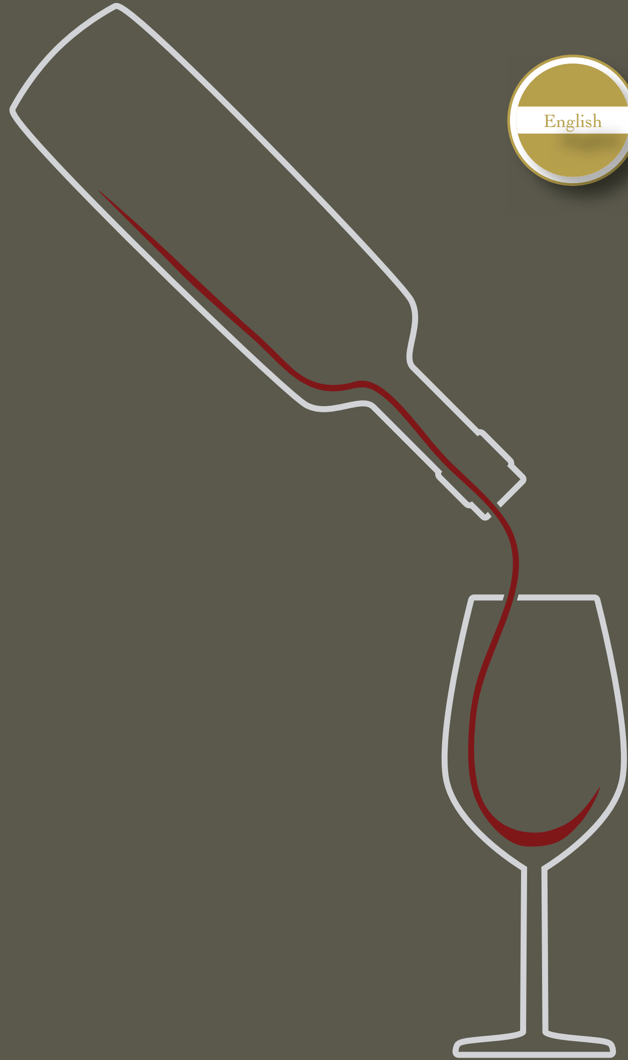
English



OVERVIEW
OF THE SOUTH AFRICAN WINE INDUSTRY
2013

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