

The South African Wine Industry

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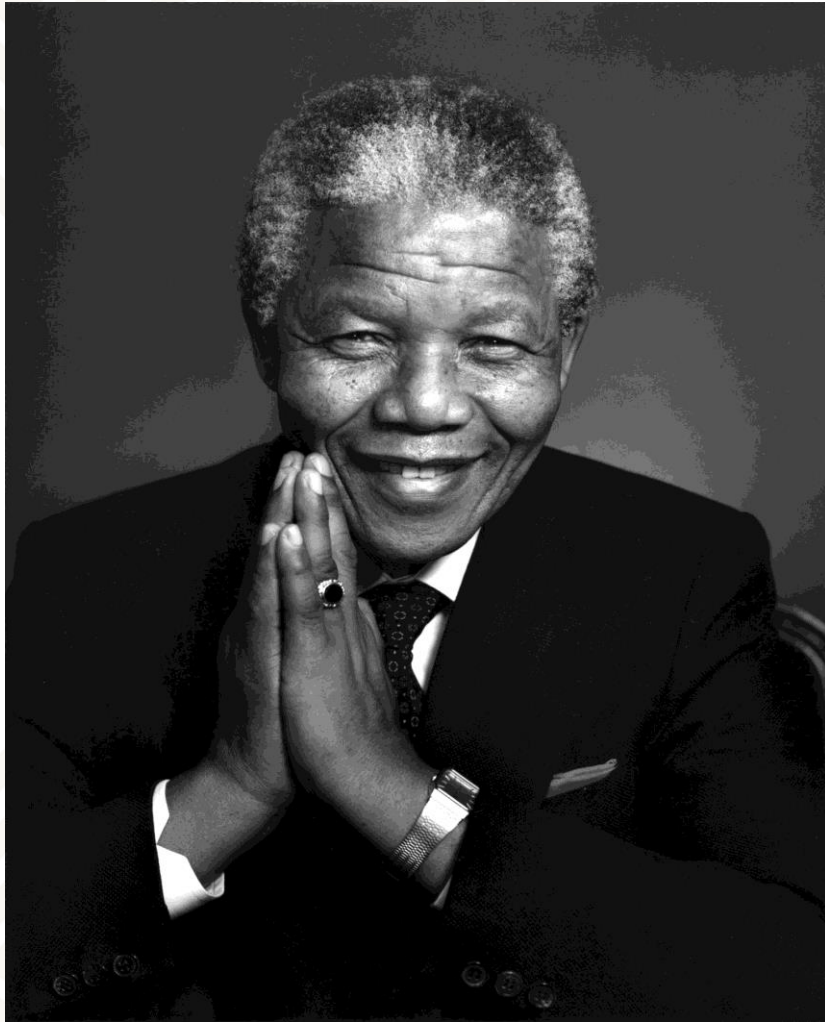


SOUTH AFRICA WINE
discover diversity in a glass

South African Wine History



How it started!



1652: Arrival of the Dutch in South Africa.

1659: February 2, Jan Van Riebeeck the first wine.

1688: Arrival of the French Huguenot immigrants.

1761: First exports of wine from the Cape.

1778: Vin de Constance winning acclaim in Europe.

1795: British occupation and increase in quality on exports.

1825: Sales of Cape wines in Britain increase.

1906: Formation of the first South African wine co-operatives.

1918: Over production of wine. KWV and Stellenbosch university.

1925: Prof Abraham Izak Perold crosses vines to produce Pinotage.

1945: Development of cold fermentation.

1961: First bottled Pinotage and Stellenbosch Wine Route opened.

1973: South African Wine of Origin legislation implemented.

1985: Liquor Amendment Act is gazetted.

1994: End of Apartheid, increase in wine exports.

The present

- The South African wine industry is backed by various organizations helping to improve the industry.
- The Department of Viticulture and Oenology (DVO) at Stellenbosch University.
- Elsenburg Agricultural College.
- South African Grape and Wine Research Institute (SAGWRI).

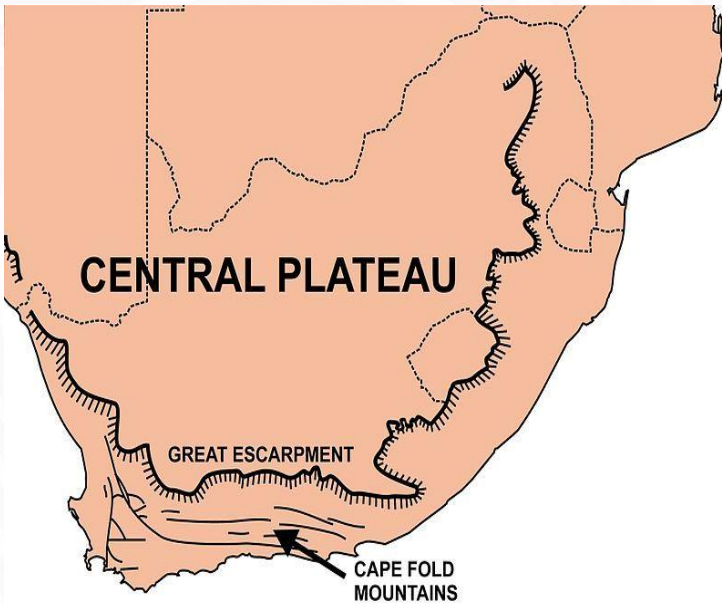




Viticultural Aspect

Climatic conditions

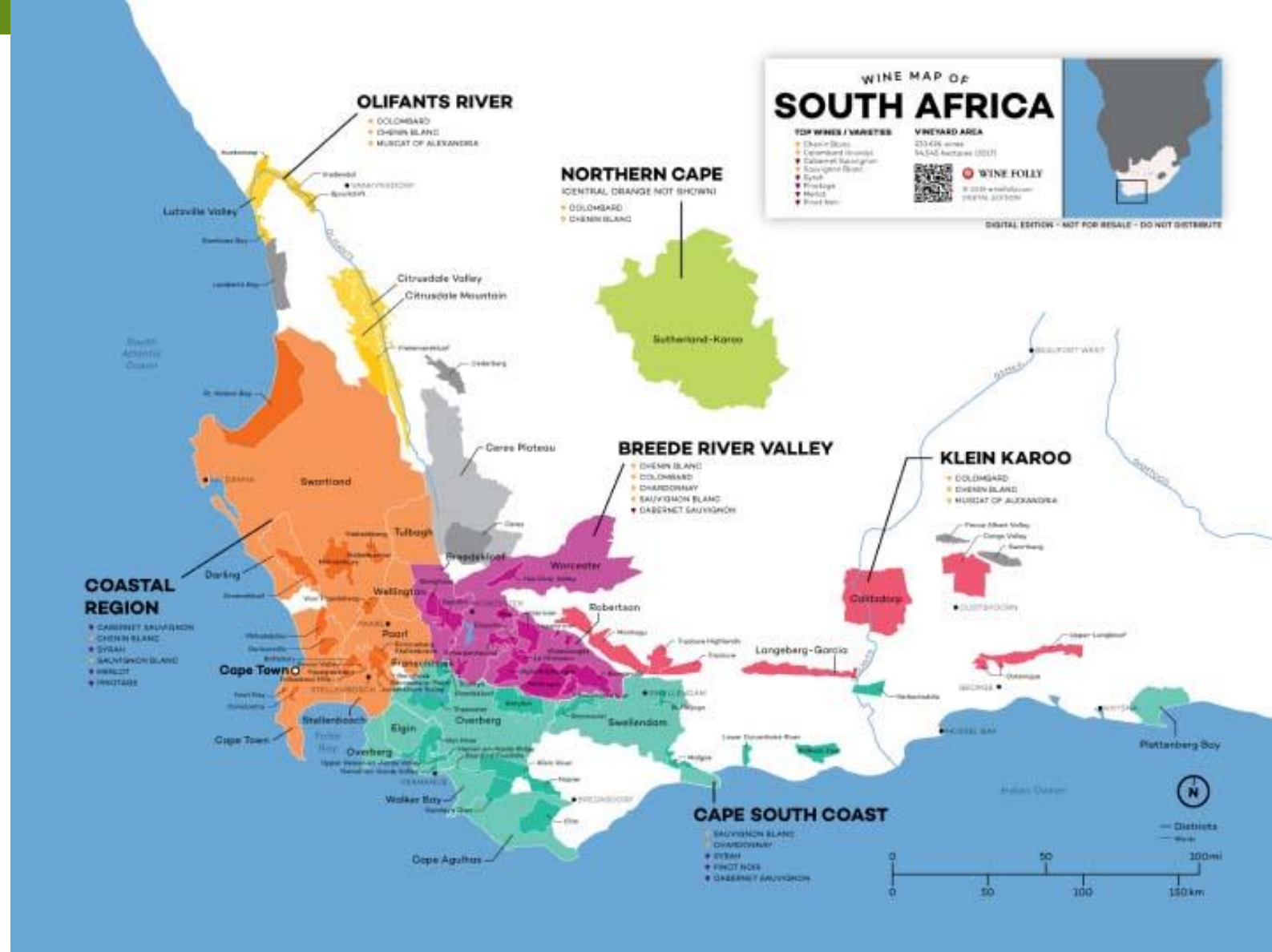
- Most grapevine growing regions are in the Western Cape. (27-34° south)
- Mediterranean climate
- Temperate climate provides warm dry summers and cool wet winters.
- Coastal regions experience helpful cool sea breezes.
- Rainfall is more prominent in more southerly regions and diminishes in a northerly direction.
- Temperature increases in a northerly direction and with distance from the sea.



- South Africa has some of the oldest soils that are diverse in characteristics.
- The soils are derived from three main soil types; Table Mountain sandstone, shale and granite.
- The Cape fold mountains form a barrier allowing certain regions different climates.
- Due to the valleys and ridges formed by the mountains create multi-directional slopes which has an impact on the terroir.
- Rain shadows are formed in certain areas.
- The ocean currents also allow for a buildup of moisture up against these mountains.

Wine regions

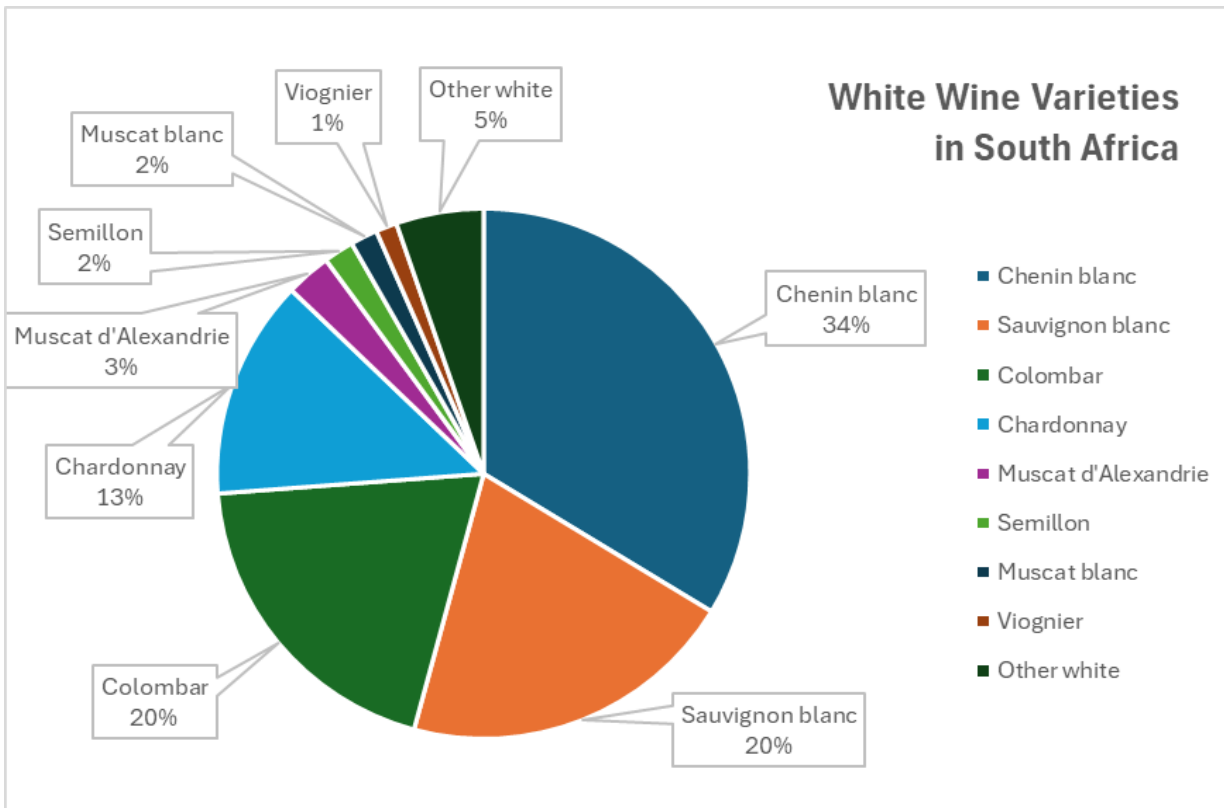
- Stellenbosch
- Paarl
- Constantia
- Franschhoek
- Swartland
- Elgin
- Klein Karoo
- Cape South Coast
- Olifants River



Varieties and Wine Styles



White Wine Varietals and Styles



Top 3 most widely planted

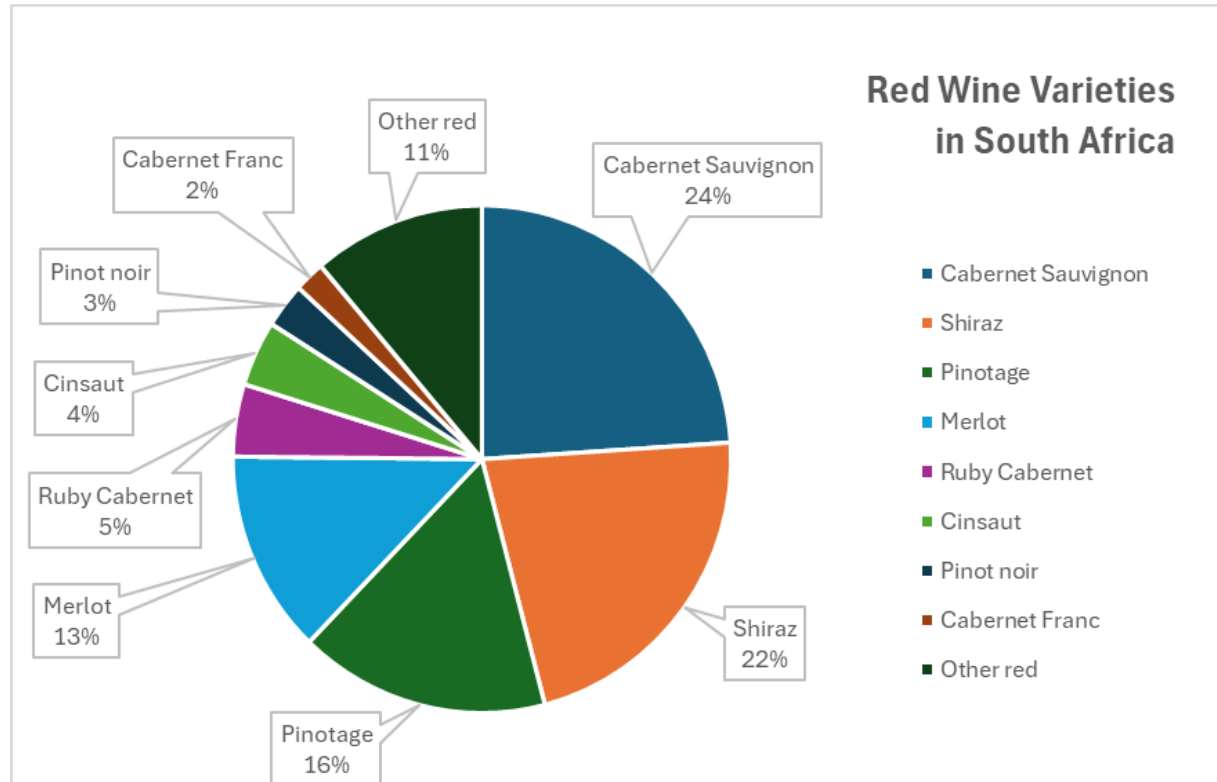
1. Chenin Blanc
2. Sauvignon Blanc
3. Colombar

SINGLE VARIETALS

WHITE BLENDS

- *Sauvignon Blanc and Semillon blends*
- *Mediterranean-style blends (Chenin Driven)*

Red Wine Varietals and Styles



Top 3 most widely planted

1. Cabernet Sauvignon
2. Shiraz
3. Pinotage

SINGLE VARIETALS

RED BLENDS

- Cape Blend (Unique to SA)
- Traditional French Style blends
- Shiraz-led blends

Other Styles Unique to SA

Methode Cap Classique (MCC)

Fortified/ Dessert wines













- Cape Pink
- Cape White
- Cape Ruby
- Cape Vintage
- Cape Late Bottled Vintage
- Cape Tawny
- Cape dated Tawny

Industry Statistics



World Ranking

Rank↔	Country	↕	Continent	↕	Quantity (1,000 hl)	↕	% of Total Production
1	 Italy		Europe		49,843		19.30%
2	 France		Europe		45,590		17.65%
3	 Spain		Europe		35,703		13.82%
4	 U.S.		America		22,385		8.67%
5	 Australia		Oceania		12,745		4.93%
6	 Chile		America		12,444		4.82%
7	 Argentina		America		11,451		4.43%
8	 South Africa		Africa		10,155		3.93%
9	 Germany		Europe		8,940		3.46%
10	 Portugal		Europe		6,777		2.62%

Total South African wine vineyard area

87 848

-1 536ha (2022) **HECTARES**

55% White | 45% Red

Global

7 280 000 ha

WINE PRODUCTION 2023 ESTIMATE



GRAPES CRUSHED
1.18 m TONNES
-13.8%



WINE PRODUCED
935 m LITRES
-12.5%



786 m litres wine,
149 m litres other products

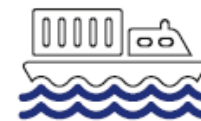
LOCAL 61% VOLUME



VOLUME
486.4
MILLION LITRES



VALUE
R25.6 bn
RETAIL SELLING VALUE
+6.3%



EXPORTS 39% VOLUME



VOLUME
306.3
MILLION LITRES
-17%



VALUE
R10.0 bn
FOB VALUE
+0.9%

TOTAL EXPORTS

R9.9 bn	368.8 m litres
-2.4%	-5.0%

Age distribution (2023) – Industry

White

- < 4 Years
- 4-10 Years
- 11-15 Years
- 16-20 Years
- >20 Years



Red

- < 4 Years
- 4-10 Years
- 11-15 Years
- 16-20 Years
- >20 Years



COMPOSITION 2012 - 2022



PRODUCERS
2 487
-4.9%



CELLARS
523
-2.4%



270 364
employees in the
entire value-chain



85 962
farm and cellar
employees

FOCUS MARKETS BY VALUE (ZAR)

Country	R	
United Kingdom	2.4 bn	-5%
Germany	1.0 bn	-17%
African Countries	819 m	+8%
USA	798 m	-10%
The Netherlands	754 m	-6%
Canada	602 m	-8%
Sweden	424 m	-14%
Denmark	363 m	+11%
Belgium	348 m	-2%
China	337 m	-26%
France	289 m	+36%
UAE	231 m	+36%

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Sustainable Production



Tourism

 <p>Paarl Wine Route</p>	 <p>Plett Winelands</p>	 <p>Robertson Wine Valley</p>	 <p>Elgin Valley Wine Route</p>	 <p>Franschhoek Wine Valley</p>	 <p>Hemel-en-Aarde Wines</p>
 <p>SA Brandy Routes</p>	 <p>Stanford Wine Route</p>	 <p>Stellenbosch Wine Routes</p>	 <p>Klein Karoo Wine Route</p>	 <p>Midlands Meander (KwaZulu-Natal)</p>	 <p>Orange River Wine Route</p>
 <p>Swartland Wine & Olive Route</p>	 <p>Tulbagh Wine Route</p>	 <p>Visit our Wineyards</p>	 <p>Agulhas Wine Triangle</p>	 <p>Bot River Wine Route</p>	 <p>Breedekloof Wine Valley</p>
 <p>Wellington Wine Route</p>	 <p>West Coast Wine Route</p>	 <p>Worcester Wine & Olive Route</p>	 <p>Constantia Wine Route</p>	 <p>Darling Wine & Food Experience</p>	 <p>Durbanville Wine Valley</p>



The map displays the Western Cape province of South Africa, divided into several wine regions. Key locations marked include: LUTZVILLE, VREDENDAL, NIEUWOUDDVILLE, LAMBERTS BAY, LEIPOLDVILLE-SANDVELD, CLANWILLIAM, CEDERBERG, CITRUSDAL, BEAUFORT WEST, SALDANHA, PIKETBERG, DARLING, MALMESBURY, TULBAGH, CERES, LAINGSBURG, PHILADELPHIA, DURBANVILLE, PAARL, RAWSONVILLE, WORCESTER, MONTAGU, BONNIEVALE, PRINCE ALBERT VALLEY, SWARTBERG, CALITZDORP, DUDTSHOORN, CAPE TOWN, STELLENBOSCH, FRANSCHHOEK, ROBERTSON, VILLIERSDORP, SWELLENDAM, LANGEBERG-GARCIA, GEORGE, KNYSNA, PLETTENBERG BAY, CONSTANTIA, BOT RIVER, HERMANUS, CALEDON, STANFORD, ELIM, HALGAS, MOSSEL BAY, and CAPE AGULHAS. Major roads like the N1, N7, and M7 are also indicated.



Stellenbosch
UNIVERSITY
IYUNIVESITHI
UNIVERSITEIT

Thank you
Enkosi
Dankie

Photo by Stefan Els