Analytix Business Intelligence is a South African marketing planning and business intelligence company who conduct local and global market research and analysis to help companies make smarter, more accountable decisions and improve their return on investment.

We are an independent company with the expertise and resources to provide objective and reliable market intelligence reports.

We have compiled and are in the process of compiling a number of South African reports with the intention of providing affordable South African market insight to companies and individuals.

In addition, we are experts at doing desk and Internet research to create customised reports regarding consumer segments, industries or markets.

We provide customised marketing planning, market research and analytical solutions so if you have specific needs and requirements, please contact us directly.
Purpose: The information contained in this report is to be utilised for information purposes only.

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REPORT OVERVIEW

Compiled: March 2014
(124 pages)

This comprehensive report examines South African Wine Exports (2008-2013): Total Volume and Value, Total exports, Total Volume and Value (Price Per Litre) by Wine Categories (Varietals), Detailed analysis of 15 export countries, Red versus White Wine exports, Bulk versus Packaged exports.

The export analysis is based on raw data supplied by South African Wine Information & Systems (SAWIS) and includes all exports from South Africa during the 6 year period from 2008 to 2013.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

- What were the total export volumes from 2008 to 2013 and what was the average price per litre?
- What was the size of the export market from 2008-2013?
- Which varietals are being exported the most? What was the price per litre per varietal?
- Who are the biggest importers of South African wine around the world? How are they importing Wine (Bulk versus Packaged)? Are they importing Red, White or Rose/Blanc De Noir wine?
- What were the price per litre trends for each country for the period 2008 – 2013?
BACKGROUND AND PROJECT OBJECTIVES
SAWIS had significant volumes of wine export data (>500 000 lines) and commissioned Analytix BI to analyse and visually report on key trends between 2008 and 2013.

Analytix BI proposed to provide **VOLUME AND VALUE** intelligence, focusing on the following parameters:

- Top Export Countries
- Top 10 Wine Varieties
- Red wine vs. White wine vs. Rose/Blanc De Noir
- Packaged vs. Bulk

The following analysis and report presents this information through visual charts and graphics. Salient points and key insights are highlighted and summarised in comment boxes on each page.

**Note:** **Red Wine includes:**
Cabernet Sauvignon, Merlot, Pinotage, Shiraz and Other Red Wine.

**White Wine includes:**
Chardonnay, Chenin blanc, Sauvignon blanc and Other White Wine.
To calculate the average price per litre, outliers i.e. observations that are numerically very distant from the rest of the data, were identified and excluded to achieve the most reliable, credible and accurate figures with the highest level of statistical precision and the lowest margin of error.

The outliers were identified in conjunction with SAWIS, based on their significant experience and understanding of the South African wine market. The following exports were included in the value analysis for the 6 year period (2008-2013):

- **Bulk Exports**: Any exports to leave South Africa with an average price per litre (Total value at FOB price divided by the volume exported) between R3.00 per litre (FOB price) and R50.00 per litre (FOB price).

- **Packaged Exports**: Any exports to leave South Africa with an average price per litre (Total value at FOB price divided by the volume exported) between R10.00 per litre (FOB price) and R300.00 per litre (FOB price).

After these exclusions were applied, only 10% of all exports were not taken into account when evaluating the more than 500 000 exports data values provided by SAWIS - ensuring that the average price per litre calculations have been based on very robust data.

Analytix Business Intelligence has significant experience in data analysis and reporting, with over 100 pre-packaged and published industry reports available on various sectors in South Africa and selected countries in Africa.
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EXECUTIVE SUMMARY
DASHBOARD: SOUTH AFRICAN WINE EXPORTS (2008 – 2013)

Total Export Volume Trends (2008-2013)
- 2008: 407.3 million litres
- 2009: 389.1 million litres
- 2010: 370.9 million litres
- 2011: 350.4 million litres
- 2012: 408.9 million litres
- 2013: 517.4 million litres

Average Export Value Trend (2008-2013)
- 2008: R15.94 per litre
- 2009: R16.19 per litre
- 2010: R17.34 per litre
- 2011: R16.41 per litre
- 2012: R14.42 per litre
- 2013: R13.77 per litre

Total Export Revenue Trends (2008-2013)
- 2008: R6 492.4 million
- 2009: R6 300.0 million
- 2010: R6 431.4 million
- 2011: R5 750.1 million
- 2012: R5 896.3 million
- 2013: R7 124.6 million

Top 5 Varietals Volume (2008 versus 2013)
- 81.0m (20%): Other White Wine
- 135.2m (26%)
- 137.6m (34%): Other Red Wine
- 121.1m (23%)
- 24.5m (6%): Rose & Blanc Noir
- 65.0m (13%)
- 43.1m (11%): Chenin blanc
- 53.6m (10%)
- 19.9m (5%): Sauvignon blanc
- 38.2m (7%)

Top 5 Varietals Price Per Litre (2008 versus 2013)
- R24.63: Shiraz
- R24.02
- R23.89: Cabernet Sauvignon
- R23.46
- R19.02: Pinotage
- R20.56
- R24.22: Sauvignon blanc
- R18.68
- R19.94: Chardonnay
- R16.94

Total Export Revenue Trends (2008-2013)
- 2008: R6 492.4 million
- 2009: R6 300.0 million
- 2010: R6 431.4 million
- 2011: R5 750.1 million
- 2012: R5 896.3 million
- 2013: R7 124.6 million
# DASHBOARD: SOUTH AFRICAN WINE EXPORTS (2008 – 2013)

## Red vs White vs Rose/Blanc De Noir Volume Trend (2008 versus 2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>Red (Volume)</th>
<th>White (Volume)</th>
<th>Rose (Volume)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>209.3m (51%)</td>
<td>173.6m (43%)</td>
<td>24.5m (6%)</td>
</tr>
<tr>
<td>2013</td>
<td>197.8m (38%)</td>
<td>254.6m (49%)</td>
<td>65.0m (13%)</td>
</tr>
</tbody>
</table>

## Bulk vs Packaged Volume Trend (2008 versus 2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>Bulk (Volume)</th>
<th>Packaged (Volume)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>183.9m (45%)</td>
<td>223.4m (55%)</td>
</tr>
<tr>
<td>2013</td>
<td>341.8m (66%)</td>
<td>175.6m (34%)</td>
</tr>
</tbody>
</table>

## Countries Volume Trend (2008 versus 2013)

<table>
<thead>
<tr>
<th>Country</th>
<th>2008 (Volume)</th>
<th>2013 (Volume)</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>110.6m (32%)</td>
<td>110.8m (25%)</td>
</tr>
<tr>
<td>Germany</td>
<td>67.4m (20%)</td>
<td>96.4m (21%)</td>
</tr>
<tr>
<td>Russia</td>
<td>18.3m (5%)</td>
<td>37.2m (8%)</td>
</tr>
<tr>
<td>France</td>
<td>8.4m (2%)</td>
<td>34.7m (8%)</td>
</tr>
<tr>
<td>Sweden</td>
<td>28.8m (8%)</td>
<td>32.9m (7%)</td>
</tr>
<tr>
<td>USA</td>
<td>16.6m (5%)</td>
<td>31.7m (7%)</td>
</tr>
<tr>
<td>Canada</td>
<td>13.6m (4%)</td>
<td>22.1m (5%)</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>29.3m (8%)</td>
<td>22.0m (5%)</td>
</tr>
<tr>
<td>Denmark</td>
<td>15.7m (5%)</td>
<td>20.1m (4%)</td>
</tr>
<tr>
<td>Italy</td>
<td>0.6m (0%)</td>
<td>15.2m (3%)</td>
</tr>
<tr>
<td>Spain</td>
<td>9,000 (0%)</td>
<td>12.5m (3%)</td>
</tr>
<tr>
<td>China</td>
<td>4.3m (1%)</td>
<td>5.7m (1%)</td>
</tr>
<tr>
<td>Kenya</td>
<td>1.8m (1%)</td>
<td>4.3m (1%)</td>
</tr>
<tr>
<td>Nigeria</td>
<td>2.2m (1%)</td>
<td>3.2m (1%)</td>
</tr>
<tr>
<td>Angola</td>
<td>24.6m (7%)</td>
<td>0.8m (0%)</td>
</tr>
</tbody>
</table>

## Red vs White vs Rose/Blanc De Noir Price Per Litre (2008 versus 2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>Red (Price)</th>
<th>White (Price)</th>
<th>Rose (Price)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>R18.01</td>
<td>R14.07</td>
<td>R12.46</td>
</tr>
<tr>
<td>2013</td>
<td>R17.95</td>
<td>R11.99</td>
<td>R8.04</td>
</tr>
</tbody>
</table>

## Bulk vs Packaged Price Per Litre (2008 versus 2013)

<table>
<thead>
<tr>
<th>Year</th>
<th>Bulk (Price)</th>
<th>Packaged (Price)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>R5.39</td>
<td>R24.16</td>
</tr>
<tr>
<td>2013</td>
<td>R6.69</td>
<td>R27.84</td>
</tr>
</tbody>
</table>
KEY FACTS ABOUT THE WINE EXPORT MARKET

1. South Africa’s total wine exports declined from 407.3 million litres in 2008 to 350.4 million litres in 2011 but recovered to reach a record 517.4 million litres in 2013.

2. Other White Wine had the highest volume in terms of wine exports for 2013 at 135.2 million litres, an increase from the 81.0 million litres exported in 2008.

3. South Africa’s average revenue from total wine exports declined from R6 492.4 million in 2008 to R5 750.1 million in 2011, however, significantly increased to R7 124.6 million in 2013.

4. Other Red Wine exports decreased from 34% of total exports in 2008 to just 23% of total exports in 2013. In comparison, Other White Wine exports increased from 20% of the total volume exported in 2008 to 26% in 2013.

5. Shiraz had the highest average Price Per Litre in 2013, among the top 5 varietal exports, at R24.02, this was a decrease from R24.63 in 2008.

6. Rose and Blanc De Noir had the lowest Average Price Per litre, among all varietal exports at R8.04 in 2013, this was a decrease from R12.46 in 2008. This could be due to the fact that Rosé exported in 2013 was estimated to be on average 80% white. Previously it was 75% red on average.

7. Red Wine export volumes decreased from 209.3 million litres in 2008 to 197.8 million litres in 2013, while White Wine export volumes increased from 173.6 million litres to 254.6 million litres and Rose/Blanc De Noir export volumes increased from 24.5 million litres to 65.0 million litres between 2008 and 2013.
8. The proportion of White Wine exported in 2013 was 49% of the total export volume, an increase from 43% in 2008, while the proportion of Red Wine exported in 2013 was 38%, a decline from 51% in 2008.

9. Exports of Rose/Blanc De Noir had increased from 6% of the total volume of wine exported in 2008 to 13% in 2013.

10. Bulk export volumes increased from 183.9 million litres in 2008 to 341.8 million litres in 2013, while Packaged export volumes decreased from 223.4 million litres in 2008 to 175.6 million litres in 2013.

11. Packaged exports had declined from a proportion of 55% of the total export volume in 2008 to a proportion of 34% in 2013, while Bulk export volumes had increased in proportion from 45% in 2008 to 66% in 2013.

12. The United Kingdom was the leading export market in terms of volume of wine from South Africa, with 110.8 million litres exported in 2013.

13. Export volumes to the Netherlands decreased from 29.3 million litres in 2008 to 22.0 million litres in 2013, while volumes exported to Canada increased from 13.6 million litres in 2008 to 22.1 million litres in 2013.

14. Export volumes to China increased from 4.3 million litres in 2008 to 5.7 million litres in 2013, while volumes exported to Angola decreased from 24.6 million litres in 2008 to 0.8 million litres in 2013.
TOTAL WINE EXPORTS
2008 - 2013
South Africa’s total wine exports declined from 407.3 million litres in 2008 to 350.4 million litres in 2011 but recovered to reach 517.4 million litres in 2013.

The average Price Per Litre decreased from R15.94 in 2008 to its lowest level of R13.77 in 2013.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS BY WINE CATEGORY (VARIETAL) 2008 - 2013
### WINE EXPORTS BY CATEGORY: TOP 5 VOLUME (2008 – 2013)

#### Wine Category Volume Trends (Top 5): 2008 -2013

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other White Wine</td>
<td>80 975 616.09</td>
<td>77 322 161.18</td>
<td>69 568 484.64</td>
<td>68 052 577.09</td>
<td>94 536 867.77</td>
<td>135 240 535.78</td>
</tr>
<tr>
<td>Other Red Wine</td>
<td>137 614 607.86</td>
<td>125 704 588.96</td>
<td>118 661 182.01</td>
<td>109 382 819.43</td>
<td>103 247 733.72</td>
<td>121 088 352.60</td>
</tr>
<tr>
<td>Rose and Blanc De Noir</td>
<td>24 496 673.53</td>
<td>26 898 594.41</td>
<td>26 001 005.55</td>
<td>21 250 618.28</td>
<td>30 034 391.89</td>
<td>44 972 887.96</td>
</tr>
<tr>
<td>Chenin blanc</td>
<td>43 082 771.86</td>
<td>41 087 950.68</td>
<td>46 255 791.26</td>
<td>46 583 998.98</td>
<td>59 987 651.51</td>
<td>53 613 067.40</td>
</tr>
<tr>
<td>Sauvignon blanc</td>
<td>19 893 912.09</td>
<td>19 702 857.14</td>
<td>21 715 404.06</td>
<td>25 322 775.14</td>
<td>29 524 733.14</td>
<td>38 156 295.13</td>
</tr>
</tbody>
</table>

- Other White Wine had the highest volume in terms of wine exports for 2013 at 135.2 million litres, an increase from the 81.0 million litres exported in 2008.

Source: SAWIS Export Data 2008-2013
### WINE EXPORTS BY CATEGORY: BOTTOM 5 VOLUME (2008 – 2013)

#### Wine Category Volume Trends (Bottom 5): 2008 - 2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Chardonnay</th>
<th>Shiraz</th>
<th>Merlot</th>
<th>Cabernet Sauvignon</th>
<th>Pinotage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>29 604 908.37</td>
<td>21 356 430.75</td>
<td>11 141 057.50</td>
<td>21 548 704.62</td>
<td>17 604 945.75</td>
</tr>
<tr>
<td>2009</td>
<td>26 420 670.44</td>
<td>21 473 057.17</td>
<td>11 727 862.21</td>
<td>20 310 521.26</td>
<td>18 454 050.00</td>
</tr>
<tr>
<td>2010</td>
<td>23 499 300.79</td>
<td>18 817 878.02</td>
<td>11 601 153.19</td>
<td>20 020 591.12</td>
<td>14 806 378.00</td>
</tr>
<tr>
<td>2011</td>
<td>19 971 981.65</td>
<td>16 826 870.55</td>
<td>9 769 314.79</td>
<td>17 399 249.13</td>
<td>15 854 797.00</td>
</tr>
<tr>
<td>2012</td>
<td>31 974 277.55</td>
<td>19 463 751.22</td>
<td>9 157 158.29</td>
<td>16 172 870.68</td>
<td>14 811 280.00</td>
</tr>
<tr>
<td>2013</td>
<td>27 586 894.85</td>
<td>20 079 894.46</td>
<td>20 071 308.25</td>
<td>16 883 241.25</td>
<td>16 883 241.25</td>
</tr>
</tbody>
</table>

- Pinotage had the lowest total volume exported from South Africa in 2013 at 16.9 million litres. This was a decrease from the 17.6 million litres of Pinotage exported in 2008.

Source: SAWIS Export Data 2008-2013
Other Red Wine exports decreased from 34% of total exports in 2008 to just 23% of total exports in 2013. In comparison, Other White Wine exports increased from 20% of the total volume exported in 2008 to 26% in 2013.

The proportion of Rose and Blanc De Noir, in terms of total volume exported, increased from 6% in 2008 to 13% in 2013.
Shiraz had the highest average Price Per Litre in 2013, among the top 5 varietal exports, at R24.02, this was a decrease from R24.63 in 2008.

Cabernet Sauvignon had the second highest Price Per Litre in 2013 at R23.46, followed by Pinotage at R20.56.
Rose and Blanc De Noir had the lowest Average Price Per litre, among all varietal exports at R8.04 in 2013, this was a decrease from R12.46 in 2008. This could be due to the fact that Rosé exported in 2013 was estimated to be on average 80% white. Previously it was 75%.
### OTHER WHITE WINE BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

#### Bulk Volume vs. Packaged Volume

<table>
<thead>
<tr>
<th>Year</th>
<th>Bulk Total</th>
<th>Packaged Total</th>
<th>Bulk Average Price Per Litre</th>
<th>Packaged Average Price Per Litre</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>40 900 447.00</td>
<td>40 075 169.09</td>
<td>R 5.15</td>
<td>R 18.90</td>
</tr>
<tr>
<td>2009</td>
<td>32 890 620.00</td>
<td>44 431 541.18</td>
<td>R 4.86</td>
<td>R 17.74</td>
</tr>
<tr>
<td>2010</td>
<td>29 658 367.00</td>
<td>39 910 117.64</td>
<td>R 7.88</td>
<td>R 18.27</td>
</tr>
<tr>
<td>2011</td>
<td>35 894 510.00</td>
<td>32 158 067.09</td>
<td>R 6.48</td>
<td>R 19.64</td>
</tr>
<tr>
<td>2012</td>
<td>66 090 977.00</td>
<td>28 445 890.77</td>
<td>R 5.81</td>
<td>R 20.73</td>
</tr>
<tr>
<td>2013</td>
<td>100 976 270.00</td>
<td>34 264 265.78</td>
<td>R 6.15</td>
<td>R 20.96</td>
</tr>
</tbody>
</table>

- Bulk export volumes of Other White Wine increased from 40.9 million litres in 2008 to 101.0 million litres in 2013, while Packaged export volumes decreased from 40.1 million litres in 2008 to 34.3 million litres in 2013.
- The average Price Per Litre for Other White Wine Bulk exports had increased from R5.15 in 2008 to R6.15 in 2013, while the average Price Per Litre of Packaged exports for Other White Wine had also increased from R18.90 per litre in 2008 to R20.96 per litre in 2013.

Source: SAWIS Export Data 2008-2013
OTHER RED WINE BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

Bulk export volumes of Other Red Wine decreased from 69.7 million litres in 2008 to 68.2 million litres in 2013, while Packaged export volumes decreased from 67.9 million litres in 2008 to 52.9 million litres in 2013.

The average Price Per Litre for Other Red Wine Bulk exports had increased from R5.23 in 2008 to R7.30 in 2013, while the average Price Per Litre of Packaged exports for Other Red Wine had also increased from R23.80 per litre in 2008 to R27.85 per litre in 2013.

Source: SAWIS Export Data 2008-2013
**ROSE AND BLANC DE NOIR BY BULK VS. PACKAGED:**
**VOLUME AND PRICE PER LITRE (2008 – 2013)**

**Rose and Blanc De Noir Bulk versus Packaged Volume and Value: 2008 - 2013**

- **Bulk export volumes of Rose and Blanc De Noir increased from 10.9 million litres in 2008 to 57.8 million litres in 2013, while Packaged export volumes of Rose and Blanc De Noir decreased from 13.6 million litres in 2008 to 7.2 million litres in 2013.**

- **The average Price Per Litre for Bulk Rose and Blanc De Noir exports had increased from R4.51 in 2008 to R5.88 in 2013, while the average Price Per Litre of Packaged Rose and Blanc De Noir exports had also increased from R19.51 per litre in 2008 to R25.11 per litre in 2013.**

**Source:** SAWIS Export Data 2008-2013
CHENIN BLANC BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulk Total</td>
<td>24 540 186.64</td>
<td>21 949 183.00</td>
<td>27 562 503.00</td>
<td>30 364 243.00</td>
<td>44 565 684.00</td>
<td>37 937 685.00</td>
</tr>
<tr>
<td>Packaged Total</td>
<td>18 542 585.22</td>
<td>19 138 767.68</td>
<td>18 693 288.26</td>
<td>16 219 755.98</td>
<td>15 421 967.51</td>
<td>15 675 382.40</td>
</tr>
<tr>
<td>Bulk Average Price Per Litre</td>
<td>R 5.58</td>
<td>R 5.15</td>
<td>R 5.48</td>
<td>R 6.25</td>
<td>R 5.56</td>
<td>R 5.44</td>
</tr>
<tr>
<td>Packaged Average Price Per Litre</td>
<td>R 19.23</td>
<td>R 18.65</td>
<td>R 19.13</td>
<td>R 20.39</td>
<td>R 20.94</td>
<td>R 23.01</td>
</tr>
</tbody>
</table>

- Bulk export volumes of Chenin blanc increased from 24.5 million litres in 2008 to 37.9 million litres in 2013, while Packaged export volumes of Chenin blanc decreased from 18.5 million litres in 2008 to 15.7 million litres in 2013.
- The average Price Per Litre for Bulk Chenin blanc exports had decreased from R5.58 in 2008 to R5.44 in 2013, while the average Price Per Litre of Packaged Chenin blanc exports had increased from R19.23 per litre in 2008 to R23.01 per litre in 2013.
SAUVIGNON BLANC BY BULK VS. PACKAGED:
VOLUME AND PRICE PER LITRE (2008 – 2013)

Bulk export volumes of Sauvignon blanc increased from 4.2 million litres in 2008 to 17.9 million litres in 2013, while Packaged export volumes of Sauvignon blanc increased from 15.7 million litres in 2008 to 20.3 million litres in 2013.

The average Price Per Litre for Bulk Sauvignon blanc exports had increased from R5.91 in 2008 to R7.66 in 2013, while the average Price Per Litre of Packaged Sauvignon blanc exports had decreased from R29.24 per litre in 2008 to R28.30 per litre in 2013.

Source: SAWIS Export Data 2008-2013
CHARDONNAY BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

Chardonnay Bulk versus Packaged Volume and Value: 2008 - 2013

- Bulk export volumes of Chardonnay increased from 12.3 million litres in 2008, to 21.1 million litres in 2012, but decreased in 2013 to 16.2 million litres. Packaged Chardonnay export volumes decreased from 17.3 million litres in 2008 to 11.4 million litres in 2013.

- The average Price Per Litre for Bulk Chardonnay exports had increased from R5.97 in 2008 to R6.65 in 2013, while the average Price Per Litre of Packaged Chardonnay exports had also increased from R24.67 per litre in 2008 to R31.29 per litre in 2013.

Source: SAWIS Export Data 2008-2013
SHIRAZ BY BULK VS. PACKAGED:
VOLUME AND PRICE PER LITRE (2008 – 2013)

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bulk Total</strong></td>
<td>3,499,330.00</td>
<td>3,504,842.00</td>
<td>3,428,003.00</td>
<td>4,281,143.00</td>
<td>7,330,178.00</td>
<td>9,323,316.00</td>
</tr>
<tr>
<td><strong>Packaged Total</strong></td>
<td>17,857,100.75</td>
<td>17,968,215.17</td>
<td>15,389,875.02</td>
<td>12,545,727.55</td>
<td>12,133,573.22</td>
<td>10,756,578.46</td>
</tr>
<tr>
<td><strong>Bulk Average Price Per Litre</strong></td>
<td>R 5.89</td>
<td>R 7.30</td>
<td>R 13.38</td>
<td>R 11.15</td>
<td>R 10.33</td>
<td>R 9.66</td>
</tr>
<tr>
<td><strong>Packaged Average Price Per Litre</strong></td>
<td>R 28.19</td>
<td>R 27.66</td>
<td>R 29.31</td>
<td>R 31.31</td>
<td>R 32.97</td>
<td>R 36.37</td>
</tr>
</tbody>
</table>

-Bulk export volumes of Shiraz increased from 3.5 million litres in 2008 to 9.3 million litres in 2013, while Packaged Shiraz export volumes decreased from 17.9 million litres in 2008 to 10.8 million litres in 2013.

- The average Price Per Litre for Bulk Shiraz exports had increased from R5.89 in 2008 to R9.66 in 2013, while the average Price Per Litre of Packaged Shiraz exports had also increased from R28.19 per litre in 2008 to R36.37 per litre in 2013.

Source: SAWIS Export Data 2008-2013
MERLOT BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

**Merlot Bulk versus Packaged Volume and Value: 2008 - 2013**

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bulk Total</strong></td>
<td>2 609 460.00</td>
<td>2 546 054.00</td>
<td>2 082 310.00</td>
<td>3 496 809.00</td>
<td>4 393 460.00</td>
<td>15 258 047.00</td>
</tr>
<tr>
<td><strong>Packaged Total</strong></td>
<td>8 531 597.50</td>
<td>9 181 808.21</td>
<td>9 518 843.19</td>
<td>6 272 505.79</td>
<td>4 763 698.29</td>
<td>4 813 261.25</td>
</tr>
<tr>
<td><strong>Bulk Average Price Per Litre</strong></td>
<td>R 6.40</td>
<td>R 6.40</td>
<td>R 10.91</td>
<td>R 11.25</td>
<td>R 12.97</td>
<td>R 8.35</td>
</tr>
<tr>
<td><strong>Packaged Average Price Per Litre</strong></td>
<td>R 28.85</td>
<td>R 26.00</td>
<td>R 26.11</td>
<td>R 30.43</td>
<td>R 32.00</td>
<td>R 33.58</td>
</tr>
</tbody>
</table>

- Bulk export volumes of Merlot increased from 2.6 million litres in 2008 to 15.3 million litres in 2013, while Packaged Merlot export volumes decreased from 8.5 million litres in 2008 to 4.8 million litres in 2013.
- The average Price Per Litre for Bulk Merlot exports had increased from R6.40 in 2008 to R8.35 in 2013, while the average Price Per Litre of Packaged Merlot exports had also increased from R28.85 per litre in 2008 to R33.58 per litre in 2013.

**Source:** SAWIS Export Data 2008-2013
CABERNET SAUVIGNON BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

- Bulk export volumes of Cabernet Sauvignon increased from 7.3 million litres in 2008 to 9.0 million litres in 2013, while Packaged export volumes of Cabernet Sauvignon decreased from 14.2 million litres in 2008 to 10.8 million litres in 2013.
- The average Price Per Litre for Bulk Cabernet Sauvignon exports had increased from R7.42 in 2008 to R9.66 in 2013, while the average Price Per Litre of Packaged Cabernet Sauvignon exports had also increased from R30.92 per litre in 2008 to R34.80 per litre in 2013.

Source: SAWIS Export Data 2008-2013
PINOTAGE BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

Pinotage Bulk versus Packaged Volume and Value: 2008 - 2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Bulk Volume</th>
<th>Packaged Volume</th>
<th>Bulk Price per Litre</th>
<th>Packaged Price per Litre</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>7 988 903.00</td>
<td>9 616 042.75</td>
<td>R 5.14</td>
<td>R 28.63</td>
</tr>
<tr>
<td>2009</td>
<td>8 600 921.00</td>
<td>9 853 129.00</td>
<td>R 5.69</td>
<td>R 27.12</td>
</tr>
<tr>
<td>2010</td>
<td>5 784 561.00</td>
<td>9 021 817.00</td>
<td>R 6.81</td>
<td>R 30.27</td>
</tr>
<tr>
<td>2011</td>
<td>7 562 653.00</td>
<td>8 292 144.00</td>
<td>R 7.15</td>
<td>R 31.00</td>
</tr>
<tr>
<td>2012</td>
<td>7 087 766.00</td>
<td>7 723 514.00</td>
<td>R 7.43</td>
<td>R 32.43</td>
</tr>
<tr>
<td>2013</td>
<td>9 275 947.00</td>
<td>7 607 294.25</td>
<td>R 7.73</td>
<td>R 36.06</td>
</tr>
</tbody>
</table>

- Bulk export volumes of Pinotage increased from 8.0 million litres in 2008 to 9.3 million litres in 2013, while Packaged Pinotage export volumes decreased from 9.6 million litres in 2008 to 7.6 million litres in 2013.
- The average Price Per Litre for Bulk Pinotage exports had increased from R5.14 in 2008 to R7.73 in 2013, while the average Price Per Litre of Packaged Pinotage exports had also increased from R28.63 per litre in 2008 to R36.06 per litre in 2013.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS: RED VERSUS WHITE VERSUS ROSE/BLANC DE NOIR 2008 - 2013

Note:

**Red Wine includes:**
Cabernet Sauvignon, Merlot, Pinotage, Shiraz and Other Red Wine.

**White Wine includes:**
Chardonnay, Chenin blanc, Sauvignon blanc and Other White Wine.
WINE EXPORTS BY RED VS. WHITE VS. ROSE/BLANC DE NOIR: VOLUME AND PRICE PER LITRE (2008 – 2013)

Red versus White versus Rose/Blanc De Noir Volume and Value: 2008 - 2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Red Total Volume</th>
<th>White Total Volume</th>
<th>Rose/Blanc De Noir Total Volume</th>
<th>Red Average Price/Litre</th>
<th>White Average Price/Litre</th>
<th>Rose/Blanc De Noir Average Price/Litre</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>209 265 746.48</td>
<td>197 670 079.60</td>
<td>24 496 673.53</td>
<td>R 18.01</td>
<td>R 14.07</td>
<td>R 12.46</td>
</tr>
<tr>
<td>2009</td>
<td>197 670 079.60</td>
<td>164 533 639.44</td>
<td>26 898 594.41</td>
<td>R 18.18</td>
<td>R 14.41</td>
<td>R 12.42</td>
</tr>
<tr>
<td>2010</td>
<td>183 907 182.34</td>
<td>161 038 980.75</td>
<td>26 001 005.55</td>
<td>R 19.50</td>
<td>R 15.32</td>
<td>R 14.04</td>
</tr>
<tr>
<td>2011</td>
<td>169 233 050.90</td>
<td>159 931 332.86</td>
<td>21 250 618.28</td>
<td>R 19.04</td>
<td>R 14.07</td>
<td>R 12.93</td>
</tr>
<tr>
<td>2012</td>
<td>162 852 793.91</td>
<td>21 602 3529.97</td>
<td>30 034 391.89</td>
<td>R 19.10</td>
<td>R 11.53</td>
<td>R 10.29</td>
</tr>
<tr>
<td>2013</td>
<td>197 841 869.79</td>
<td>254 596 793.16</td>
<td>64 972 887.96</td>
<td>R 17.95</td>
<td>R 11.99</td>
<td>R 8.04</td>
</tr>
</tbody>
</table>

- Red Wine export volumes decreased from 209.3 million litres in 2008 to 197.8 million litres in 2013, while White Wine export volumes increased from 173.6 million litres to 254.6 million litres and Rose/Blanc De Noir export volumes increased from 24.5 million litres to 65.0 million litres between 2008 and 2013.

- The average Price Per Litre of Red Wine had decreased from R18.01 in 2008 to R17.95 in 2013, while the average Price Per Litre of White Wine and Rose/Blanc De Noir also decreased from R14.07 to R11.99 and R12.46 to R8.04, respectively.

Source: SAWIS Export Data 2008-2013
The proportion of White Wine exported in 2013 was 49% of the total export volume, an increase from 43% in 2008, while the proportion of Red Wine exported in 2013 was 38%, a decline from 51% in 2008.

Exports of Rose/Blanc De Noir had increased from 6% of the total volume of wine exported in 2008 to 13% in 2013.
WINE EXPORTS:
BULK VERSUS PACKAGED
2008 - 2013
# Wine Exports by Bulk vs. Packaged: Volume and Price per Litre (2008 – 2013)

## Table: Wine Exports by Bulk vs. Packaged Volume and Price per Litre (2008 – 2013)

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bulk Total</strong></td>
<td>183 927 466.64</td>
<td>150 529 346.00</td>
<td>148 640 899.00</td>
<td>172 621 437.88</td>
<td>248 456 822.00</td>
<td>341 818 633.00</td>
</tr>
<tr>
<td><strong>Packaged Total</strong></td>
<td>223 392 161.78</td>
<td>238 572 967.45</td>
<td>222 306 269.64</td>
<td>177 793 564.16</td>
<td>160 453 893.77</td>
<td>175 592 920.91</td>
</tr>
<tr>
<td><strong>Bulk Average Price Per Litre</strong></td>
<td>R 5.39</td>
<td>R 5.70</td>
<td>R 7.51</td>
<td>R 7.19</td>
<td>R 6.66</td>
<td>R 6.69</td>
</tr>
<tr>
<td><strong>Packaged Average Price Per Litre</strong></td>
<td>R 24.16</td>
<td>R 22.51</td>
<td>R 23.70</td>
<td>R 25.64</td>
<td>R 26.71</td>
<td>R 27.84</td>
</tr>
</tbody>
</table>

- Bulk export volumes increased from 183.9 million litres in 2008 to 341.8 million litres in 2013, while Packaged export volumes decreased from 223.4 million litres in 2008 to 175.6 million litres in 2013.
- The average Price Per Litre for Bulk exports had increased from R5.39 in 2008 to R6.69 in 2013, while the average Price Per Litre of Packaged exports had also increased from R24.16 per litre in 2008 to R27.84 per litre in 2013.

Source: SAWIS Export Data 2008-2013
Packaged exports had declined from a proportion of 55% of the total export volume in 2008 to a proportion of 34% in 2013, while Bulk export volumes had increased in proportion from 45% in 2008 to 66% in 2013.
WINE EXPORTS:
BY COUNTRY
2008 - 2013
## WINE EXPORTS BY COUNTRY (2008 – 2013)

The United Kingdom was the leading export market in terms of volume of wine from South Africa, with 110.8 million litres exported in 2013.

### Export Volumes by Country

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>110 628 931.02</td>
<td>125 561 424.45</td>
<td>104 916 799.58</td>
<td>81 345 921.71</td>
<td>91 134 409.77</td>
<td>110 751 251.22</td>
</tr>
<tr>
<td>Germany</td>
<td>67 356 782.80</td>
<td>70 834 267.75</td>
<td>72 302 656.78</td>
<td>80 162 964.45</td>
<td>77 532 705.10</td>
<td>96 393 593.85</td>
</tr>
<tr>
<td>Russia</td>
<td>18 345 446.64</td>
<td>7 011 826.25</td>
<td>7 847 699.50</td>
<td>8 353 692.65</td>
<td>31 599 571.00</td>
<td>37 205 257.25</td>
</tr>
<tr>
<td>France</td>
<td>8 422 860.50</td>
<td>8 671 371.00</td>
<td>7 768 669.75</td>
<td>9 338 645.25</td>
<td>12 341 959.00</td>
<td>34 688 542.00</td>
</tr>
<tr>
<td>Sweden</td>
<td>28 790 949.42</td>
<td>37 720 242.70</td>
<td>38 276 906.94</td>
<td>36 749 443.71</td>
<td>33 028 699.78</td>
<td>32 901 668.71</td>
</tr>
</tbody>
</table>

Source: SAWIS Export Data 2008-2013
### Wine Exports by Country (2008 – 2013)

#### Export Volumes by Country

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>16 624 804.93</td>
<td>13 720 614.75</td>
<td>13 627 604.92</td>
<td>12 853 082.79</td>
<td>23 151 472.25</td>
<td>31 743 036.00</td>
</tr>
<tr>
<td>Canada</td>
<td>13 563 548.25</td>
<td>11 559 591.60</td>
<td>14 038 045.00</td>
<td>14 135 508.00</td>
<td>20 943 054.50</td>
<td>22 104 968.75</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>29 271 773.99</td>
<td>27 604 851.44</td>
<td>26 840 076.48</td>
<td>24 854 453.11</td>
<td>22 409 065.36</td>
<td>21 987 240.83</td>
</tr>
<tr>
<td>Denmark</td>
<td>15 675 853.24</td>
<td>16 161 134.30</td>
<td>17 333 427.00</td>
<td>17 761 526.74</td>
<td>15 517 560.09</td>
<td>20 074 053.76</td>
</tr>
<tr>
<td>Italy</td>
<td>597 971.00</td>
<td>1 383 273.00</td>
<td>331 597.00</td>
<td>255 011.75</td>
<td>6 154 058.75</td>
<td>15 181 770.00</td>
</tr>
</tbody>
</table>

- Export volumes to the Netherlands decreased from 29.3 million litres in 2008 to 22.0 million litres in 2013, while volumes exported to Canada increased from 13.6 million litres in 2008 to 22.1 million litres in 2013.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS BY COUNTRY (2008 – 2013)

Export volumes to China increased from 4.3 million litres in 2008 to 5.7 million litres in 2013, while volumes exported to Angola decreased from 24.6 million litres in 2008 to 0.8 million litres in 2013.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
UNITED KINGDOM
2008 - 2013
In 2013, Red Wine export volumes to the United Kingdom were 47.6 million litres, an increase from 46.9 million litres in 2008. The volume of White Wine export volumes increased from 53.5 million litres in 2008 to 55.4 million litres in 2013. Rose/Blanc De Noir export volumes decreased from 10.2 million litres in 2008 to 7.7 million litres in 2013.

The average Price Per Litre for Red Wine had decreased from R16.29 in 2008 to R13.75 in 2013, while the Price Per Litre of White Wine and Rose/Blanc De Noir had also decreased from R14.81 to R12.76 and R14.19 to R11.01 respectively, over the same period.

### Source
SAWIS Export Data 2008-2013
The proportion of White Wine exported to the United Kingdom had increased marginally from 48% in 2008 to 50% in 2013, while Red Wine exports had also increased slightly from 42% to 43% over the same period.

Exports of Rose/Blanc De Noir accounted for 7% of wine exports to the United Kingdom in 2013, down from 9% in 2008.
Bulk export volumes to the United Kingdom were recorded at 71.1 million litres in 2013, an increase from the 24.6 million litres exported in 2008. Packaged export volumes had decreased from 86.1 million litres in 2008 to 39.7 million litres in 2013.

The average Price Per Litre for Bulk exports to the United Kingdom had increased from R4.19 in 2008 to R8.54 in 2013, while the average Price Per Litre for Packaged exports had also increased from R18.77 to R21.97 over the same period.
Of the total volumes exported to the United Kingdom in 2013, 64% were Bulk exports, compared to just 22% in 2008. The volume of Packaged exports had decreased from 78% in 2008 to 36% in 2013.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
GERMANY
2008 - 2013
GERMANY BY RED VS. WHITE VS. ROSE/BLANC DE NOIR: VOLUME AND PRICE PER LITRE (2008 – 2013)

In 2013, Red Wine export volumes to Germany were 44.8 million litres, compared to 12.4 million litres of Rose/Blanc De Noir. White Wine export volumes had increased from 21.7 million litres in 2008 to 39.2 million litres in 2013.

The average Price Per Litre for Red Wine had increased from R13.23 in 2008 to R13.72 in 2013, while the average Price Per Litre of Rose/Blanc De Noir had also increased from R6.99 in 2008 to R7.10 in 2013.

Source: SAWIS Export Data 2008-2013
GERMANY EXPORT TRENDS:
RED VS. WHITE VS. ROSE/BLANC DE NOIR (2008 – 2013)

The proportions of White Wine and Rose/Blanc De Noir exported to Germany had increased from 32% to 41% and 8% to 13% respectively, between 2008 and 2013, while Red Wine exported to Germany had decreased from 59% to 46%, over the same period.

Source: SAWIS Export Data 2008-2013
GERMANY BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

- Bulk export volumes to Germany were recorded at 77.7 million litres in 2013, an increase from 51.8 million litres in 2008. Packaged export volumes had also increased from 15.6 million litres in 2008 to 18.7 million litres in 2013.
- The average Price Per Litre for Bulk exports to Germany had increased from R5.75 in 2008 to R6.52 in 2013.

Source: SAWIS Export Data 2008-2013
Of the total volumes exported to Germany, 81% were Bulk exports in 2013, compared to 19% that were Packaged exports.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
RUSSIA
2008 - 2013
RUSSIA BY RED VS. WHITE VS. ROSE/BLANC DE NOIR: VOLUME AND PRICE PER LITRE (2008 – 2013)

In 2013, White Wine export volumes to Russia were 35.6 million litres, compared to 1.6 million litres of Red Wine. White Wine export volumes had increased from 16.2 million litres in 2008.

The average Price Per Litre for Red Wine had increased from R13.87 in 2008 to R19.82 in 2013, while the average Price Per Litre of Rose/Blanc De Noir had increased dramatically from R3.59 to R41.70, over the same period.

Source: SAWIS Export Data 2008-2013
The proportion of White Wine exported to Russia had increased from 88% in 2008 to 96% in 2013, while Red Wine exported to Russia had decreased from 10% to 4% over the same period.

Source: SAWIS Export Data 2008-2013
RUSSIA BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

Bulk export volumes to Russia were recorded at 35.4 million litres in 2013, an increase from 17.1 million litres in 2008. Packaged export volumes had increased from 1.3 million litres in 2008 to 1.8 million litres in 2013.

The average Price Per Litre for Bulk exports to Russia had decreased from R6.13 in 2008 to R5.72 in 2013.

Source: SAWIS Export Data 2008-2013
RUSSIA EXPORT TRENDS: BULK VS. PACKAGED (2008 – 2013)

Of the total volumes exported to Russia, 5% were Packaged exports in 2013 compared to the 95% that were Bulk exports. This was similar to 2008, where 7% of exports to Russia were Packaged and 93% were Bulk.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
FRANCE
2008 - 2013
In 2013, Red Wine export volumes to France were 7.5 million litres, compared to 8.3 million litres of White Wine and 18.9 million litres of Rose/Blanc De Noir. Red Wine export volumes had increased from 4.7 million litres in 2008.

The average Price Per Litre of White Wine had decreased from R9.29 in 2008 to R6.85 in 2013, while the average Price Per Litre for Red Wine had decreased from R11.93 to R9.33 over the same period.
FRANCE EXPORT TRENDS:
RED VS. WHITE VS. ROSE/BLANC DE NOIR (2008 – 2013)

The proportion of White Wine and Red Wine exported to France had decreased from 32% to 24% and 56% to 22%, respectively, between 2008 and 2013, while the proportion of Rose/Blanc De Noir exported to France had increased from 12% to 55% over the same period.

Source: SAWIS Export Data 2008-2013
Bulk export volumes to France were recorded at 33.8 million litres in 2013, an increase from 7.6 million litres in 2008. Packaged export volumes had remained relatively constant at 0.9 million litres from 2008 to 2013.

The average Price Per Litre for Packaged exports to France had decreased from R45.91 in 2008 to R41.14 in 2013.

Of the total volumes exported to France, 98% were Bulk exports in 2013 compared to the 2% that were Packaged exports. This was in comparison to 2008, where 90% of exports to France were Bulk and 10% were Packaged.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
SWEDEN
2008 - 2013
In 2013, Red Wine export volumes to Sweden were 15.3 million litres, compared to 16.3 million litres of White Wine. Rose/Blanc De Noir export volumes had increased from 0.2 million litres in 2008 to 1.3 million litres in 2013.

The average Price Per Litre of White Wine had decreased from R18.90 in 2008 to R14.40 in 2013, while the average Price Per Litre of Rose/Blanc De Noir had also decreased from R36.05 to R31.66 over the same period.

Source: SAWIS Export Data 2008-2013
The proportion of White Wine exported to Sweden had increased from 40% in 2008 to 50% in 2013, while Red Wine exported to Sweden had decreased from 60% to 47% over the same period.

Rose/Blanc De Noir made up 4% of total wine exports to Sweden in 2013.
**SWEDEN BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)**

**Bulk versus Packaged Volume and Value: 2008 - 2013**

- **Bulk Volume**
- **Packaged Volume**
- **Bulk Average Price/Litre**
- **Packaged Price/Litre**

<table>
<thead>
<tr>
<th>Year</th>
<th>Bulk Volume</th>
<th>Packaged Volume</th>
<th>Bulk Average Price/Litre</th>
<th>Packaged Price/Litre</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>1 008 710.00</td>
<td>27 782 239.42</td>
<td>R 11.63</td>
<td>R 23.02</td>
</tr>
<tr>
<td>2009</td>
<td>5 047 435.00</td>
<td>32 672 807.70</td>
<td>R 7.59</td>
<td>R 21.75</td>
</tr>
<tr>
<td>2010</td>
<td>6 319 211.00</td>
<td>31 957 695.94</td>
<td>R 6.45</td>
<td>R 20.73</td>
</tr>
<tr>
<td>2011</td>
<td>10 609 157.00</td>
<td>26 140 286.71</td>
<td>R 7.93</td>
<td>R 22.03</td>
</tr>
<tr>
<td>2012</td>
<td>11 014 533.00</td>
<td>22 014 166.78</td>
<td>R 5.40</td>
<td>R 23.31</td>
</tr>
<tr>
<td>2013</td>
<td>11 872 538.00</td>
<td>21 029 130.71</td>
<td>R 5.50</td>
<td>R 25.50</td>
</tr>
</tbody>
</table>

- Bulk export volumes to Sweden were recorded at 11.9 million litres in 2013, an increase from 1.0 million litres in 2008. Packaged export volumes had decreased from 27.8 million litres in 2008 to 21.0 million litres in 2013.
- The average Price Per Litre for Bulk exports to Sweden had decreased from R11.63 in 2008 to R5.50 in 2013.

Source: SAWIS Export Data 2008-2013
Of the total volumes exported to Sweden, 64% were Packaged exports in 2013, compared to the 96% that were Packaged exports in 2008.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
UNITED STATES OF AMERICA
2008 - 2013
In 2013, White Wine export volumes to the USA were 17.6 million litres, compared to 0.3 million litres of Rose/Blanc De Noir. Red Wine export volumes had increased from 4.5 million litres in 2008 to 13.8 million litres in 2013.

The average Price Per Litre for Red Wine had decreased from R33.34 in 2008 to R16.58 in 2013, while the average Price Per Litre for Rose/Blanc De Noir had increased from R31.73 to R44.00 over the same period.

Source: SAWIS Export Data 2008-2013
UNITED STATES EXPORT TRENDS: RED VS. WHITE VS. ROSE/BLANC DE NOIR (2008 – 2013)

The proportion of White Wine exported to the USA had decreased from 72% in 2008 to 55% in 2013, while Red Wine exported to the USA had increased from 27% to 44% over the same period.

Rose/Blanc De Noir exports remained constant at 1% for the six year period.

Source: SAWIS Export Data 2008-2013
UNITED STATES BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

Bulk export volumes to the USA were recorded at 21.6 million litres in 2013, an increase from 8.2 million litres in 2008. Packaged export volumes had also increased from 8.5 million litres in 2008 to 10.1 million litres in 2013.

The average Price Per Litre for Bulk exports to the USA had increased slightly from R5.08 in 2008 to R5.78 in 2013.

Source: SAWIS Export Data 2008-2013
UNITED STATES EXPORT TRENDS: BULK VS. PACKAGED (2008 – 2013)

Of the total volumes exported to the USA, 32% were Packaged exports in 2013 compared to the 68% that were Bulk exports.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
CANADA
2008 - 2013
In 2013, Rose/Blanc De Noir export volumes to Canada were 0.5 million litres, compared to 5.3 million litres of Red Wine. White Wine export volumes had increased from 6.8 million litres in 2008 to 16.3 million litres in 2013.

The average Price Per Litre for White Wine had decreased from R15.95 in 2008 to R12.37 in 2013, while the Price Per Litre of Red Wine had increased from R28.49 to R32.10 over the same period.

Source: SAWIS Export Data 2008-2013
The proportion of White Wine exported to Canada had increased from 50% in 2008 to 74% in 2013, while Red Wine exported to Canada had decreased from 49% to 24% over the same period.

Rose/Blanc De Noir accounted for just 2% of total wine exports to Canada in 2013.

Source: SAWIS Export Data 2008-2013
### CANADA BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

#### Bulk versus Packaged Volume and Value: 2008 - 2013

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulk Volume</td>
<td>5 954 901.00</td>
<td>3 090 831.00</td>
<td>5 300 962.00</td>
<td>6 670 158.00</td>
<td>13 020 734.00</td>
<td>14 391 812.00</td>
</tr>
<tr>
<td>Packaged Volume</td>
<td>7 608 647.25</td>
<td>8 468 760.60</td>
<td>8 737 083.00</td>
<td>7 465 350.00</td>
<td>7 922 320.50</td>
<td>7 713 156.75</td>
</tr>
<tr>
<td>Bulk Average Price/Litre</td>
<td>R 4.83</td>
<td>R 4.68</td>
<td>R 5.44</td>
<td>R 5.17</td>
<td>R 5.23</td>
<td>R 5.45</td>
</tr>
<tr>
<td>Packaged Price/Litre</td>
<td>R 35.49</td>
<td>R 33.52</td>
<td>R 32.69</td>
<td>R 33.28</td>
<td>R 31.58</td>
<td>R 38.51</td>
</tr>
</tbody>
</table>

- Bulk export volumes to Canada were recorded at 14.4 million litres in 2013, an increase from 6.0 million litres in 2008. Packaged export volumes had also increased from 7.6 million litres in 2008 to 7.7 million litres in 2013.
- The average Price Per Litre for Bulk exports to Canada had increased from R4.83 in 2008 to R5.45 in 2013.

Source: SAWIS Export Data 2008-2013
Of the total volumes exported to Canada, 35% were Packaged exports in 2013 compared to the 65% that were Bulk exports.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
NETHERLANDS
2008 - 2013
In 2013, Rose/Blanc De Noir export volumes to the Netherlands were 2.3 million litres, compared to 11.2 million litres of White Wine. Red Wine export volumes had decreased from 14.2 million litres in 2008 to 8.5 million litres in 2013.

The average Price Per Litre for Red Wine had increased from R20.29 in 2008 to R24.23 in 2013.
The proportion of Rose/Blanc De Noir exported to the Netherlands had decreased from 15% in 2008 to 11% in 2013, while Red Wine exported to the Netherlands had decreased from 48% to 38% over the same period.

White Wine accounted for 51% of wine exports to the Netherlands in 2013.

Source: SAWIS Export Data 2008-2013
### THE NETHERLANDS BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

#### Bulk versus Packaged Volume and Value: 2008 - 2013

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bulk Volume</strong></td>
<td>8 438 785.00</td>
<td>7 091 858.00</td>
<td>6 868 519.00</td>
<td>6 696 505.00</td>
<td>6 966 141.00</td>
<td>6 608 661.00</td>
</tr>
<tr>
<td><strong>Packaged Volume</strong></td>
<td>20 832 988.99</td>
<td>20 512 993.44</td>
<td>19 971 557.48</td>
<td>18 157 948.11</td>
<td>15 442 924.36</td>
<td>15 378 579.83</td>
</tr>
<tr>
<td><strong>Bulk Average Price/Litre</strong></td>
<td>R 5.62</td>
<td>R 6.44</td>
<td>R 6.94</td>
<td>R 5.81</td>
<td>R 5.82</td>
<td>R 6.31</td>
</tr>
</tbody>
</table>

- Packaged export volumes to the Netherlands were recorded at 15.4 million litres in 2013, a decrease from 20.8 million litres in 2008. Bulk export volumes had decreased from 8.4 million litres in 2008 to 6.6 million litres in 2013.
- The average Price Per Litre for Packaged exports to the Netherlands had increased from R25.37 in 2008 to R27.26 in 2013.

Source: SAWIS Export Data 2008-2013
Of the total volumes exported to the Netherlands, 70% were Packaged exports in 2013 compared to the 30% that were Bulk exports.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
DENMARK
2008 - 2013
DENMARK BY RED VS. WHITE VS. ROSE/BLANC DE NOIR: VOLUME AND PRICE PER LITRE (2008 – 2013)

In 2013, Red Wine export volumes to Denmark were 13.4 million litres, compared to 0.7 million litres of Rose/Blanc De Noir. White Wine export volumes had increased from 3.6 million litres in 2008 to 6.0 million litres in 2013.

The average Price Per Litre for White Wine had decreased from R20.91 in 2008 to R14.95 in 2013, while the average Price Per Litre of Rose/Blanc De Noir had also decreased from R18.81 to R14.19 over the same period.

Source: SAWIS Export Data 2008-2013
DENMARK EXPORT TRENDS:
RED VS. WHITE VS. ROSE/BLANC DE NOIR (2008 – 2013)

The proportion of White Wine exported to Denmark had increased from 23% in 2008 to 30% in 2013, while Red Wine exported to Denmark had decreased from 75% to 67% over the same period.

Rose/Blanc De Noir exports had increased from 1% of wine exports to Denmark in 2008 to 4% in 2013.

Source: SAWIS Export Data 2008-2013
DENMARK BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

Bulk export volumes to Denmark were recorded at 12.6 million litres in 2013, an increase from 3.9 million litres in 2008. Packaged export volumes had decreased from 11.7 million litres in 2008 to 7.5 million litres in 2013.

The average Price Per Litre for Bulk exports to Denmark had increased from R10.38 in 2008 to R12.04 in 2013.

Source: SAWIS Export Data 2008-2013
DENMARK EXPORT TRENDS: BULK VS. PACKAGED (2008 – 2013)

Of the total volumes exported to Denmark, 37% were Packaged exports in 2013 compared to the 63% that were Bulk exports. This was in contrast to 2008, where 75% of exports to Denmark were Packaged and 25% were Bulk.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS: ITALY
2008 - 2013
ITALY BY RED VS. WHITE VS. ROSE/BLANC DE NOIR: VOLUME AND PRICE PER LITRE (2008 – 2013)

In 2013, Rose/Blanc De Noir export volumes to Italy were 14.7 million litres, which was a substantial increase from the 49 985 litres of Rose/Blanc De Noir that were exported to the same country in 2008.

The average Price Per Litre for Rose/Blanc De Noir had decreased from R12.30 in 2008 to R5.03 in 2013, while the average Price Per Litre of Red Wine had increased from R12.62 to R23.49 over the same period.

Source: SAWIS Export Data 2008-2013
The proportion of Rose/Blanc De Noir exported to Italy had increased from 8% in 2008 to 97% in 2013, while White Wine exported to Italy had decreased from 44% to 3% over the same period.

Source: SAWIS Export Data 2008-2013
ITALY BY BULK VS. PACKAGED:
VOLUME AND PRICE PER LITRE (2008 – 2013)

Bulk versus Packaged Volume and Value: 2008 - 2013

<table>
<thead>
<tr>
<th>Years</th>
<th>Bulk Volume</th>
<th>Packaged Volume</th>
<th>Bulk Average Price/Litre</th>
<th>Packaged Price/Litre</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>505,850.00</td>
<td>92,121.00</td>
<td>R 8.93</td>
<td>R 32.35</td>
</tr>
<tr>
<td>2009</td>
<td>1,292,472.00</td>
<td>90,801.00</td>
<td>R 6.67</td>
<td>R 37.14</td>
</tr>
<tr>
<td>2010</td>
<td>199,270.00</td>
<td>132,327.00</td>
<td>R 7.41</td>
<td>R 27.43</td>
</tr>
<tr>
<td>2011</td>
<td>125,090.00</td>
<td>129,921.75</td>
<td>R 5.28</td>
<td>R 37.61</td>
</tr>
<tr>
<td>2012</td>
<td>6,039,560.00</td>
<td>114,498.75</td>
<td>R 4.35</td>
<td>R 25.22</td>
</tr>
<tr>
<td>2013</td>
<td>15,096,405.00</td>
<td>85,365.00</td>
<td>R 5.02</td>
<td>R 30.12</td>
</tr>
</tbody>
</table>

- Bulk export volumes to Italy were recorded at 15.1 million litres in 2013, a substantial increase from the 0.5 million litres in 2008.
- The average Price Per Litre for Bulk exports to Italy had decreased from R8.93 in 2008 to R5.02 in 2013.

Source: SAWIS Export Data 2008-2013
Of the total volumes exported to Italy, 99% were Bulk exports in 2013 compared to the 1% that were Packaged exports. This was in comparison to 2008, where 85% of exports to Italy were Bulk and 15% were Packaged.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
SPAIN
2008 - 2013
In 2013, White Wine export volumes to Spain was 6.2 million litres, which was a substantial increase from the 3 969 litres of White Wine that were exported to the same country in 2008. Red Wine exports to Spain amounted to 2.9 million litres in 2013, while Rose/Blanc De Noir exports were 3.3 million for the same year.

The average Price Per Litre for Red Wine had decreased from R109.91 in 2008 to R4.40 in 2013.

### Source
SAWIS Export Data 2008-2013
The proportion of White Wine exported to Spain had increased from 43% in 2008 to 50% in 2013, while Red Wine exports to Spain had decreased from 57% to 24% over the same period.

Rose/Blanc De Noir accounted for 27% of wine exports to Spain in 2013, up from 0% in 2008.

Source: SAWIS Export Data 2008-2013
**SPAIN BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)**

Bulk export volumes to Spain were recorded at 12.5 million litres in 2013, an increase from 4.7 million litres in 2012.

The average Price Per Litre for Packaged exports to Spain had decreased from R92.22 in 2008 to R87.22 in 2013.

Source: SAWIS Export Data 2008-2013
SPAIN EXPORT TRENDS: BULK VS. PACKAGED (2008 – 2013)

Of the total volumes exported to Spain from 2008 to 2011, 100% were Packaged exports. In 2012 and 2013, 100% of the total volumes exported were Bulk, compared to 0% Packaged.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS: CHINA
2008 - 2013
In 2013, Red Wine export volumes to China were 4.9 million litres, compared to 0.7 million litres of White Wine. Rose/Blanc De Noir export volumes were just 35 856.30 litres in 2013.

The average Price Per Litre for Red Wine had increased from R11.01 in 2008 to R33.91 in 2013.

Source: SAWIS Export Data 2008-2013
The proportion of White Wine exported to China had increased from 7% in 2008 to 12% in 2013, while Red Wine exported to China had decreased from 93% to 87% over the same period.

Rose/Blanc De Noir accounted for just 1% of wine exports to China in 2013.
CHINA BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

Packaged export volumes to China were recorded at 4.1 million litres in 2013, an increase from 0.9 million litres in 2008. Bulk export volumes had decreased from 3.4 million litres in 2008 to 1.6 million litres in 2013.

The average Price Per Litre for Bulk exports to China had increased From R5.00 in 2008 to R6.26 in 2013.

Source: SAWIS Export Data 2008-2013
Of the total volumes exported to China, 72% were Packaged exports in 2013 compared to the 28% that were Bulk exports. This was in contrast to 2008, where 22% of exports to China were Packaged and 78% were Bulk.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS: KENYA
2008 - 2013
In 2013, White Wine export volumes to Kenya were 3.0 million litres, which was an increase from the 0.9 million litres of White Wine that were exported to the same country in 2008.

The average Price Per Litre for Red Wine had increased from R20.51 in 2008 to R25.36 in 2013, while the average Price Per Litre of Rose/Blanc De Noir had also increased from R19.77 to R31.44 over the same period.
The proportion of White Wine exported to Kenya had increased from 48% in 2008 to 70% in 2013, while Red Wine exported to Kenya had decreased from 51% to 29% over the same period.

Rose/Blanc De Noir exports had remained relatively stable at 1% over the six year period.

Source: SAWIS Export Data 2008-2013
KENYA BY BULK VS. PACKAGED: VOLUME AND PRICE PER LITRE (2008 – 2013)

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulk Volume</td>
<td>20 820.00</td>
<td>N/A</td>
<td>24 000.00</td>
<td>N/A</td>
<td>23 980.00</td>
<td>N/A</td>
</tr>
<tr>
<td>Packaged Volume</td>
<td>1 777 183.43</td>
<td>1 733 804.50</td>
<td>3 187 143.25</td>
<td>3 755 512.60</td>
<td>3 785 940.49</td>
<td>4 255 194.24</td>
</tr>
<tr>
<td>Bulk Average Price/Litre</td>
<td>R 6.00</td>
<td>N/A</td>
<td>R 9.00</td>
<td>N/A</td>
<td>R 10.20</td>
<td>N/A</td>
</tr>
<tr>
<td>Packaged Price/Litre</td>
<td>R 19.37</td>
<td>R 18.54</td>
<td>R 17.83</td>
<td>R 17.76</td>
<td>R 18.93</td>
<td>R 21.30</td>
</tr>
</tbody>
</table>

- Packaged export volumes to Kenya were recorded at 4.3 million litres in 2013, an increase from 1.8 million litres in 2008. Bulk exports decreased from 20 820 litres in 2008 to no Bulk exports in 2013.
- The average Price Per Litre for Packaged exports to Kenya had increased from R19.37 in 2008 to R21.30 in 2013.

Source: SAWIS Export Data 2008-2013
Of the total volumes exported to Kenya, 100% were Packaged exports in 2013. This was in comparison to 2008, where 99% of exports to Kenya were Packaged and 1% were Bulk.
WINE EXPORTS
COUNTRY ANALYSIS:
NIGERIA
2008 - 2013
In 2013, Red Wine export volumes to Nigeria were 2.5 million litres, which was an increase from the 1.9 million litres of Red Wine that were exported to the same country in 2008. Rose/Blanc De Noir exports had increased from just 9 666 litres in 2008 to 0.2 million litres in 2013.

The average Price Per Litre for White Wine had increased from R22.32 in 2008 to R26.34 in 2013.
The proportion of White Wine exported to Nigeria had increased from 13% in 2008 to 17% in 2013, while Red Wine exported to Nigeria had decreased from 86% to 77% over the same period.

Rose/Blanc De Noir exports to Nigeria had increased from 0% in 2008 to 6% in 2013.

Source: SAWIS Export Data 2008-2013
Packaged export volumes to Nigeria were recorded at 3.2 million litres in 2013, an increase from 2.2 million litres in 2008. There were no Bulk exports to Nigeria from 2008 to 2013.

The average Price Per Litre for Packaged exports to Nigeria had increased from R21.76 in 2008 to R24.72 in 2013.
Of the total volumes exported to Nigeria from 2008 to 2013, 100% were Packaged exports.

Source: SAWIS Export Data 2008-2013
WINE EXPORTS
COUNTRY ANALYSIS:
ANGOLA
2008 - 2013
In 2013, White Wine export volumes to Angola were 0.1 million litres, compared to 0.6 million litres of Red Wine. Red Wine export volumes had decreased from 24.2 million litres in 2008.

The average Price Per Litre for White Wine had increased from R15.26 in 2008 to R24.30 in 2013, while the average Price Per Litre of Rose/Blanc De Noir had also increased from R19.14 to R24.48 over the same period.
The proportion of White Wine exported to Angola had increased from 1% in 2008 to 14% in 2013, while Red Wine exported to Angola had decreased from 99% to 85% over the same period.

Rose/Blanc De Noir accounted for just 1% of wine exports to Angola in 2013.

Source: SAWIS Export Data 2008-2013
Packaged export volumes to Angola were recorded at 0.7 million litres in 2013, a decrease from 1.4 million litres in 2008. Bulk export volumes had decreased from 23.1 million litres in 2008 to 48 205 litres in 2013.

The average Price Per Litre for Bulk exports to Angola had increased from R4.38 in 2008 to R11.32 in 2013.
Of the total volumes exported to Angola, 94% were Packaged exports in 2013 compared to the 6% that were Bulk exports. This was in contrast to 2008, where 6% of exports to Angola were Packaged and 94% were Bulk.

Source: SAWIS Export Data 2008-2013
– SUMMARY OF FINDINGS –
SUMMARY OF FINDINGS

Total Wine Exports

South Africa’s total wine exports declined from 407.3 million litres in 2008 to 350.4 million litres in 2011 but recovered to reach 517.4 million litres in 2013.

The average Price Per Litre decreased from R15.94 in 2008 to its lowest level of R13.77 in 2013.

South Africa’s average revenue from total wine exports declined from R6 492.4 million in 2008 to R5 750.1 million in 2011, however, significantly increased to R7 124.6 million in 2013.

Other White Wine had the highest volume in terms of wine exports for 2013 at 135.2 million litres, an increase from the 81.0 million litres exported in 2008.

Pinotage had the lowest total volume exported from South Africa in 2013 at 16.9 million litres. This was a decrease from the 17.6 million litres of Pinotage exported in 2008.

Other Red Wine exports decreased from 34% of total exports in 2008 to just 23% of total exports in 2013. In comparison, Other White Wine exports increased from 20% of the total volume exported in 2008 to 26% in 2013.

The proportion of Rose and Blanc De Noir, in terms of total volume exported, increased from 6% in 2008 to 13% in 2013.

Shiraz had the highest average Price Per Litre in 2013, among the top 5 varietal exports, at R24.02, this was a decrease from R24.63 in 2008.

Cabernet Sauvignon had the second highest Price Per Litre in 2013 at R23.46, followed by Pinotage at R20.56.

Rose and Blanc De Noir had the lowest Average Price Per litre, among all varietal exports at R8.04 in 2013, this was a decrease from R12.46 in 2008.

Red Wine export volumes decreased from 209.3 million litres in 2008 to 197.8 million litres in 2013, while White Wine export volumes increased from 173.6 million litres to 254.6 million litres and Rose/Blanc De Noir export volumes increased from 24.5 million litres to 65.0 million litres between 2008 and 2013.
SUMMARY OF FINDINGS

- **Total Wine Exports**
  - The average Price Per Litre of Red Wine had decreased from R18.01 in 2008 to R17.95 in 2013, while the average Price Per Litre of White Wine and Rose/Blanc De Noir also decreased from R14.07 to R11.99 and R12.46 to R8.04, respectively.
  - The proportion of White Wine exported in 2013 was 49% of the total export volume, an increase from 43% in 2008, while the proportion of Red Wine exported in 2013 was 38%, a decline from 51% in 2008.
  - Exports of Rose/Blanc De Noir had increased from 6% of the total volume of wine exported in 2008 to 13% in 2013.
  - Bulk export volumes increased from 183.9 million litres in 2008 to 341.8 million litres in 2013, while Packaged export volumes decreased from 223.4 million litres in 2008 to 175.6 million litres in 2013.
  - The average Price Per Litre for Bulk exports had increased from R5.39 in 2008 to R6.69 in 2013, while the average Price Per Litre of Packaged exports had also increased from R24.16 per litre in 2008 to R27.84 per litre in 2013.
  - Packaged exports had declined from a proportion of 55% of the total export volume in 2008 to a proportion of 34% in 2013, while Bulk export volumes had increased in proportion from 45% in 2008 to 66% in 2013.
  - The United Kingdom was the leading export market in terms of volume of wine from South Africa, with 110.8 million litres exported in 2013.
  - Export volumes to the Netherlands decreased from 29.3 million litres in 2008 to 22.0 million litres in 2013, while volumes exported to Canada increased from 13.6 million litres in 2008 to 22.1 million litres in 2013.
  - Export volumes to China increased from 4.3 million litres in 2008 to 5.7 million litres in 2013, while volumes exported to Angola decreased from 24.6 million litres in 2008 to 0.8 million litres in 2013.

- **Country Analysis (United Kingdom, Germany, Russia, France, Sweden)**
- **Country Analysis (USA, Canada, Netherlands, Denmark, Italy)**
- **Country Analysis (Spain, China, Kenya, Nigeria, Angola)**
The proportion of White Wine exported to the United Kingdom had increased marginally from 48% in 2008 to 50% in 2013, while Red Wine exports had also increased slightly from 42% to 43% over the same period. Exports of Rose/Blanc De Noir accounted for 7% of wine exports to the United Kingdom in 2013, down from 9% in 2008.

Of the total volumes exported to the United Kingdom in 2013 64% were Bulk exports, compared to just 22% 2008.

The proportions of White Wine and Rose/Blanc De Noir exported to Germany had increased from 32% to 41% and 8% to 13% respectively, between 2008 and 2013, while Red Wine exported to Germany had decreased from 59% to 46%, over the same period.

Of the total volumes exported to Germany, 81% were Bulk exports in 2013, compared to 19% that were Packaged exports.

The proportion of White Wine exported to Russia had increased from 88% in 2008 to 96% in 2013, while Red Wine exported to Russia had decreased from 10% to 4% over the same period.

Of the total volumes exported to Russia, 5% were Packaged exports in 2013 compared to the 95% that were Bulk exports.

The proportion of White Wine and Red Wine exported to France had decreased from 32% to 24% and 56% to 22% respectively, between 2008 and 2013, while the proportion of Rose/Blanc De Noir exported to France had increased from 12% to 55% over the same period.

Of the total volumes exported to France, 98% were Bulk exports in 2013 compared to the 2% that were Packaged exports.

The proportion of White Wine exported to Sweden had increased from 40% in 2008 to 50% in 2013, while Red Wine exported to Sweden had decreased from 60% to 47% over the same period.

Of the total volumes exported to Sweden, 64% were Packaged exports in 2013, compared to the 96% that were Packaged exports in 2008.
## SUMMARY OF FINDINGS

<table>
<thead>
<tr>
<th>Country Analysis</th>
<th>Total Wine Exports</th>
</tr>
</thead>
<tbody>
<tr>
<td>(United Kingdom, Germany, Russia, France, Sweden)</td>
<td>The proportion of White Wine exported to the USA had decreased from 72% in 2008 to 55% in 2013, while Red Wine exported to the USA had increased from 27% to 44% over the same period.</td>
</tr>
<tr>
<td></td>
<td>Of the total volumes exported to the USA, 32% were Packaged exports in 2013 compared to the 68% that were Bulk exports.</td>
</tr>
<tr>
<td></td>
<td>The proportion of White Wine exported to Canada had increased from 50% in 2008 to 74% in 2013, while Red Wine exported to Canada had decreased from 49% to 24% over the same period.</td>
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<tr>
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<td>Of the total volumes exported to Canada, 35% were Packaged exports in 2013 compared to the 65% that were Bulk exports.</td>
</tr>
<tr>
<td>(USA, Canada, Netherlands, Denmark, Italy)</td>
<td>The proportion of Rose/Blanc De Noir exported to the Netherlands had decreased from 15% in 2008 to 11% in 2013, while Red Wine exported to the Netherlands had decreased from 48% to 38% over the same period.</td>
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<tr>
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<td>Of the total volumes exported to the Netherlands, 70% were Packaged exports in 2013 compared to the 30% that were Bulk exports.</td>
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<tr>
<td>(Spain, China, Kenya, Nigeria, Angola)</td>
<td>The proportion of White Wine exported to Denmark had increased from 23% in 2008 to 30% in 2013, while Red Wine exported to Denmark had decreased from 75% to 67% over the same period.</td>
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<tr>
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<td>Of the total volumes exported to Denmark, 37% were Packaged exports in 2013 compared to the 63% that were Bulk exports.</td>
</tr>
<tr>
<td></td>
<td>The proportion of Rose/Blanc De Noir exported to Italy had increased from 8% in 2008 to 97% in 2013, while White Wine exported to Italy had decreased from 44% to 3% over the same period.</td>
</tr>
<tr>
<td></td>
<td>Of the total volumes exported to Italy, 99% were Bulk exports in 2013 compared to the 1% that were Packaged exports.</td>
</tr>
</tbody>
</table>
The proportion of White Wine exported to Spain had increased from 43% in 2008 to 50% in 2013, while Red Wine exports to Spain had decreased from 57% to 24% over the same period. Rose/Blanc De Noir accounted for 27% of wine exports to Spain in 2013, up from 0% in 2008.

Of the total volumes exported to Spain from 2008 to 2011, 100% were Packaged exports. In 2012 and 2013, 100% of the total volumes exported were Bulk, compared to 0% Packaged.

The proportion of White Wine exported to China had increased from 7% in 2008 to 12% in 2013, while Red Wine exported to China had decreased from 93% to 87% over the same period.

Of the total volumes exported to China, 72% were Packaged exports in 2013 compared to the 28% that were Bulk exports. This was in contrast to 2008, where 22% of exports to China were Packaged and 78% were Bulk.

The proportion of White Wine exported to Kenya had increased from 48% in 2008 to 70% in 2013, while Red Wine exported to Kenya had decreased from 51% to 29% over the same period.

Of the total volumes exported to Kenya, 100% were Packaged exports in 2013.

The proportion of White Wine exported to Nigeria had increased from 13% in 2008 to 17% in 2013, while Red Wine exported to Nigeria had decreased from 86% to 77% over the same period. Rose/Blanc De Noir exports to Nigeria had increased from 0% in 2008 to 6% in 2013.

Of the total volumes exported to Nigeria from 2008 to 2013, 100% were Packaged.

The proportion of White Wine exported to Angola had increased from 1% in 2008 to 14% in 2013, while Red Wine exported to Angola had decreased from 99% to 85% over the same period.

Of the total volumes exported to Angola, 94% were Packaged exports in 2013 compared to the 6% that were Bulk exports.
## CONTACT DETAILS

### CAPE TOWN

<table>
<thead>
<tr>
<th>Contact</th>
<th>Details</th>
</tr>
</thead>
<tbody>
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                | Western Cape  
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<table>
<thead>
<tr>
<th>Contact</th>
<th>Details</th>
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<tbody>
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                | Gauteng  
                | South Africa |