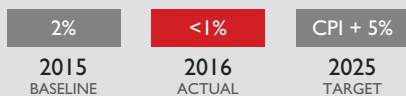


WISE WINE INDUSTRY STRATEGIC EXERCISE

STATE OF THE INDUSTRY

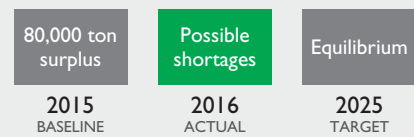


RETURN ON INVESTMENT



KEY STATISTICS:
Producers: 3 139 (-93) • Area: 96,753 (-1 843)

STOCK LEVELS



Projected stock levels end 2017 lowest in 5 years!

DOMESTIC MARKET



NETT 2 YEAR VOLUME GROWTH: ± 50 MILLION LITRE

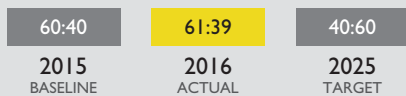
Bag in box ± 50 m litre Glass 0 m litre
Plastic - 4 m litre Tetra + 4 m litre

TRANSFORMATION: LAND & WATER



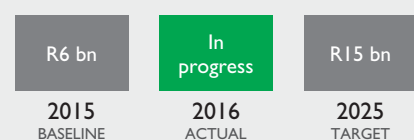
KEY INITIATIVES: Project with 35 Black Owned Brands
Continued support to 52 BEE projects • L&D desk implementation 2017

BULK: PACKAGED RATIO



Bulk: 259 m l (7%) = R1,9 bn (6%)
Packaged: 169 m l (-3%) = R7,0 bn (11%)
Total: 428 m l (3%) = R8,9 bn (10%)

WINE TOURISM



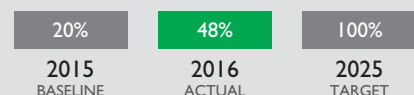
Full Implementation 2017

NEW MARKETS: (USA, CHINA, AFRICA)



Value/Total Export
Value = 20%!

ETHICAL ACCREDITED VOLUME



STRENGTHEN THE CORE!!