



SOUTH AFRICA WINE

discover diversity in a glass

RESEARCH DEVELOPMENT & INNOVATION

SOUTH AFRICAN WINE & BRANDY INDUSTRY STRATEGY

VISION

A robust, adaptable and competitive wine and brandy industry

STRATEGIC OUTCOMES



A transformed and responsible value chain



A loyal and growing local market base



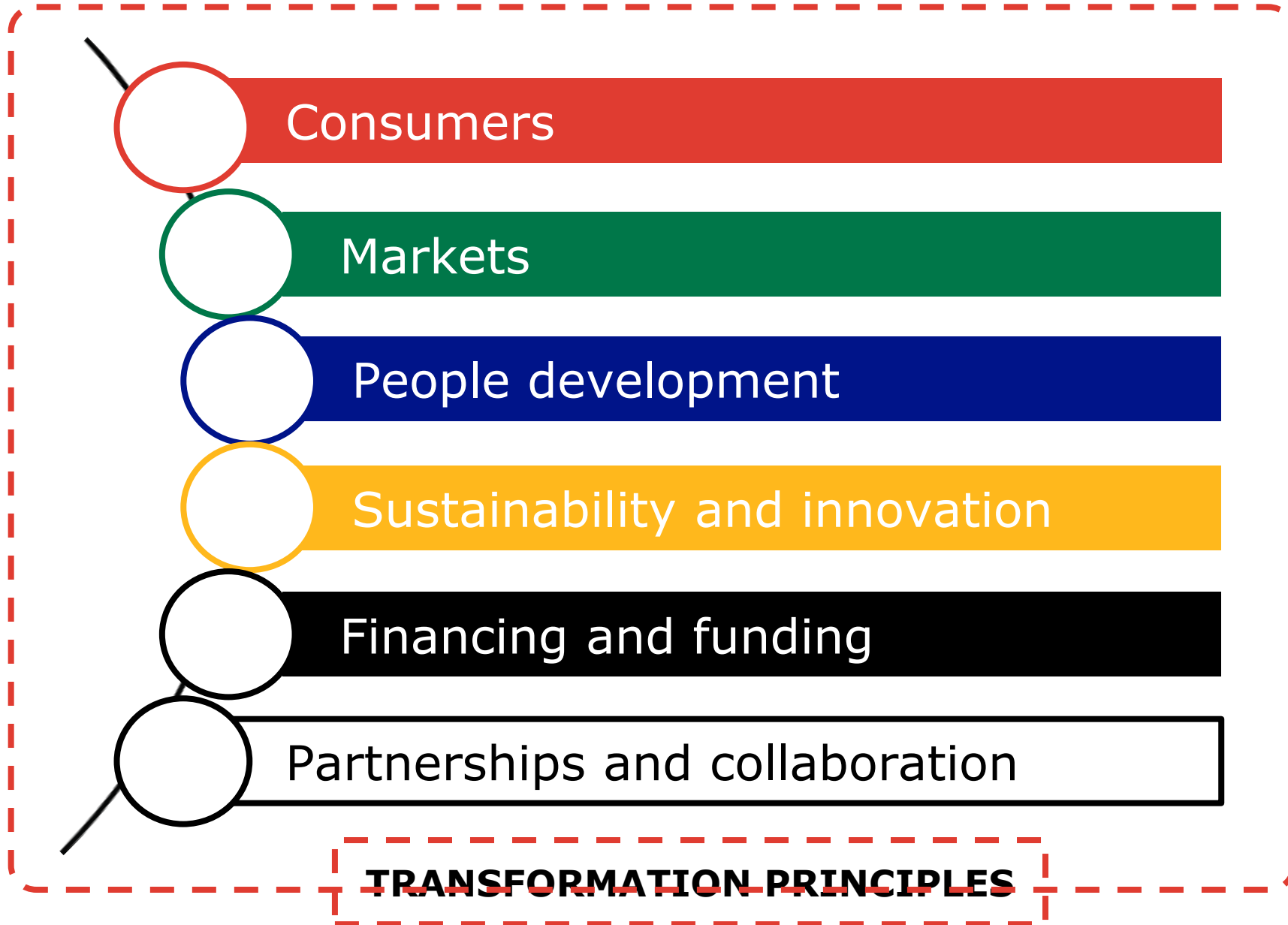
An established and enviable position in the global market



Sustainability at the core of all we do

PURPOSE

To optimise our diverse resources to deliver sustainable value to all stakeholders



ENABLERS

Ownership of the strategy by industry

An enabling regulatory environment

Demand-led, adaptable and agile production

Sufficient and sustainable funding

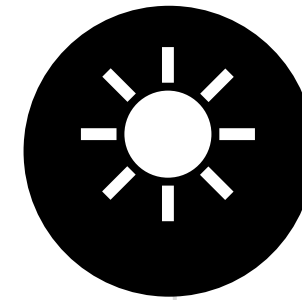
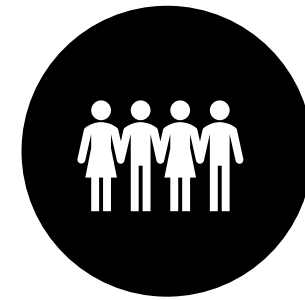
Relevant, quality and accessible R&D

Credible data to inform decisions and track performance

A Modern RDI System - ChatGPT

Should integrate multiple critical elements to effectively address current challenges, including climate change, sustainability, and global market demands.

Collaborative and Multi-stakeholder engagement



Climate Resilience & Sustainability focus

Data-driven decision making and digital transformation



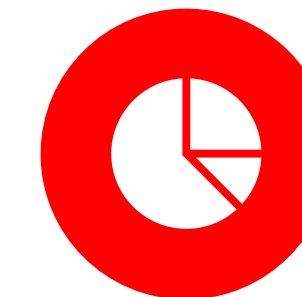
Market-driven Innovation

Policy & Regulatory Support



Funding and Incentives for RDI Activities

Knowledge Transfer and Capacity Building



ESG Compliance

Ethical and Social Considerations



Agility and Responsiveness

RESEARCH PORTFOLIO

Allocates **significant resources** to fund research projects spanning various domains within viticulture and oenology.

These projects focus on vineyard management, pest and disease control, grape and wine quality improvement, climate change adaptation, water efficiency, and other sustainable production practices.

FLAGSHIP PROGRAMMES

Climate change/Pre-breeding-disease tolerance/Water efficiency/Authenticity



VITICULTURE RESEARCH

Cultivation/Plant Protection & improvement/Soil/P&D/



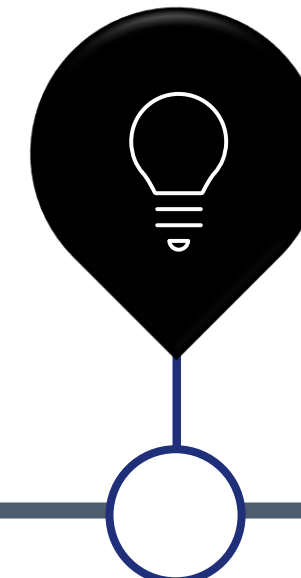
OENOLOGY RESEARCH

Wine quality and process improvement



INNOVATION

Ecosystem development/Venture building



KNOWLEDGE TRANSFER

Regional information days/Books/Technical reports/Info sheets etc.





RDI PROJECTS 2025

ALL 68

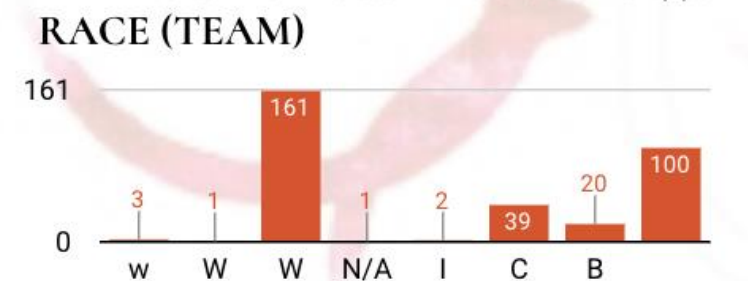
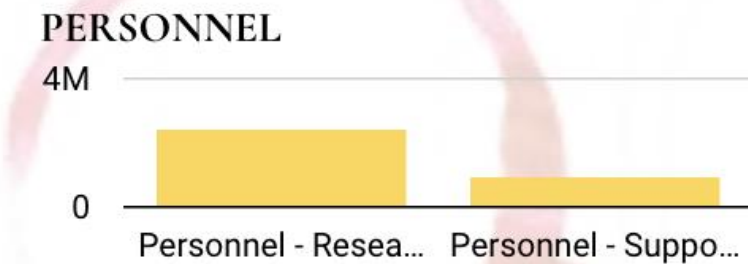
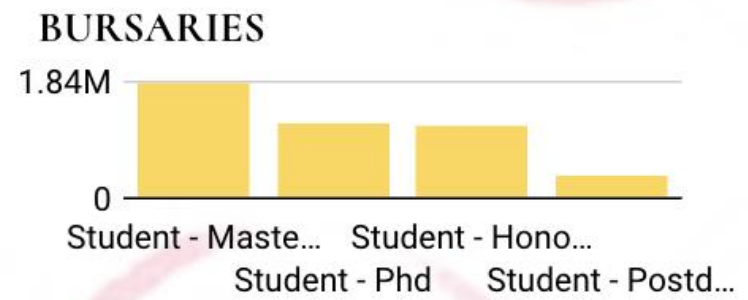
FUNDED 45

STATUS ▾ STRATEGY ▾ MAIN COMMITTEE ▾ GROUP ▾ INSTITUTION ▾ THEME ▾ Project Number ▾

CURRENT FUNDING PROJECTS 2025

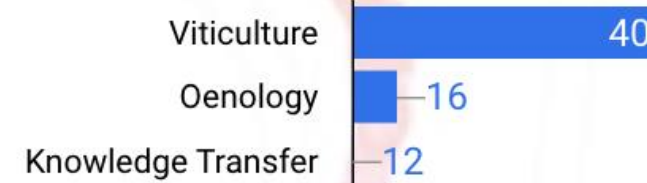


HUMAN CAPITAL

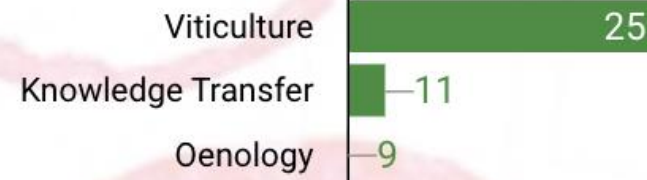


UNIVERSITY LEVIES Levy amounts **841.0K**

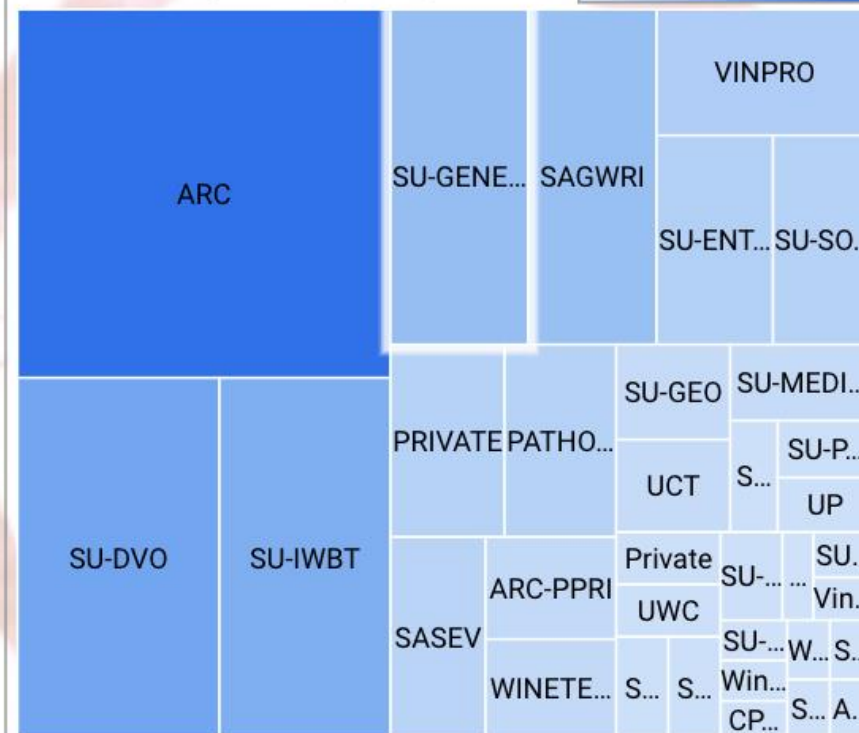
PROJECT PORTFOLIO ALL PROJECTS



RECEIVING FUNDING



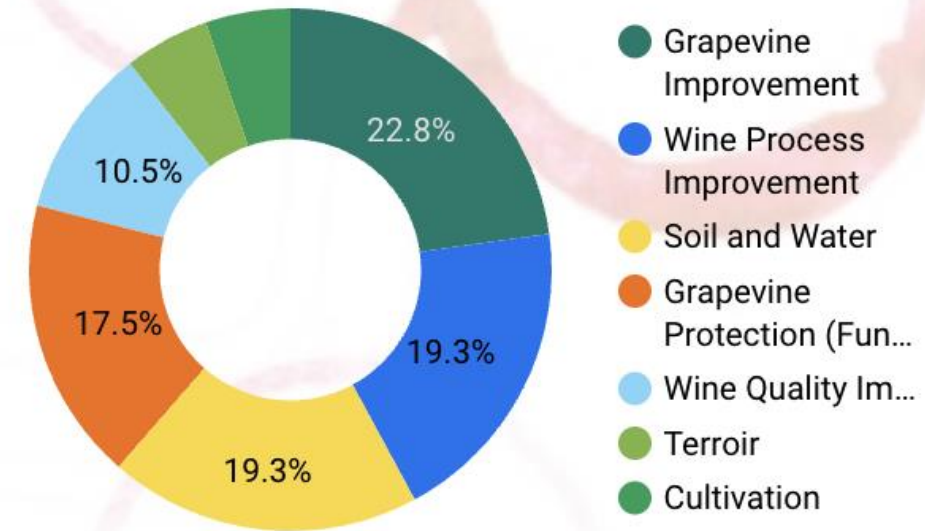
INSTITUTION



STRATEGY (funding)



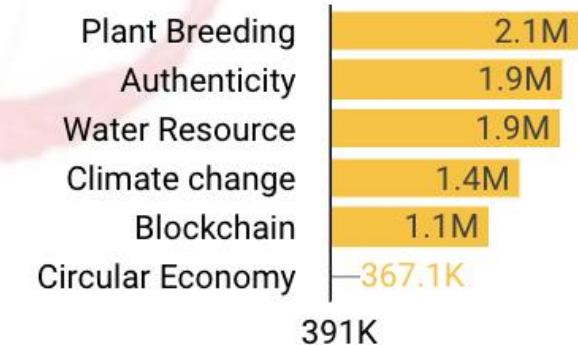
SUPPORT MAIN COMMITTEE



FUNDING / PROGRAM



FLAGSHIPS



WINE INDUSTRY INNOVATION: CONTEXT

FOCUS AREAS

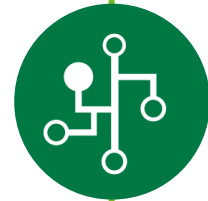
Water use efficiency



Climate change readiness



Traceability Authenticity



Plant breeding



Valorisation (waste/by-products)



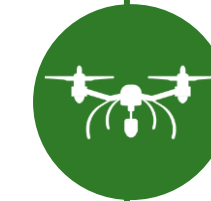
TECHNOLOGIES



Sensors

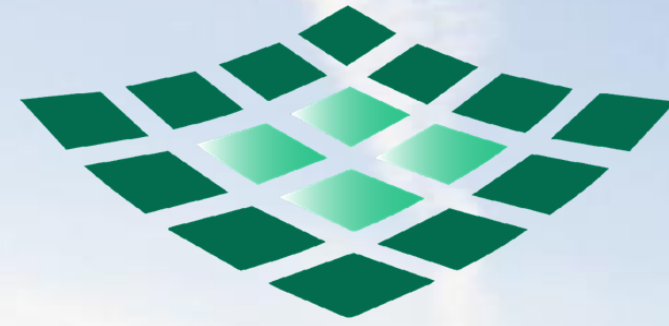


Genetics/biotech



Remote sensing/Precision viticulture

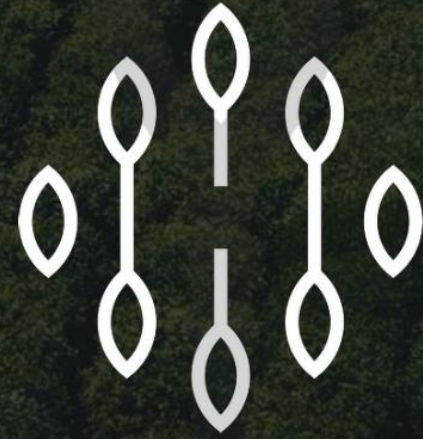




TERRACLIM

FORWARD FARMING

STRENGTHS CLIMATE RESILIENCE IN AGRICULTURE



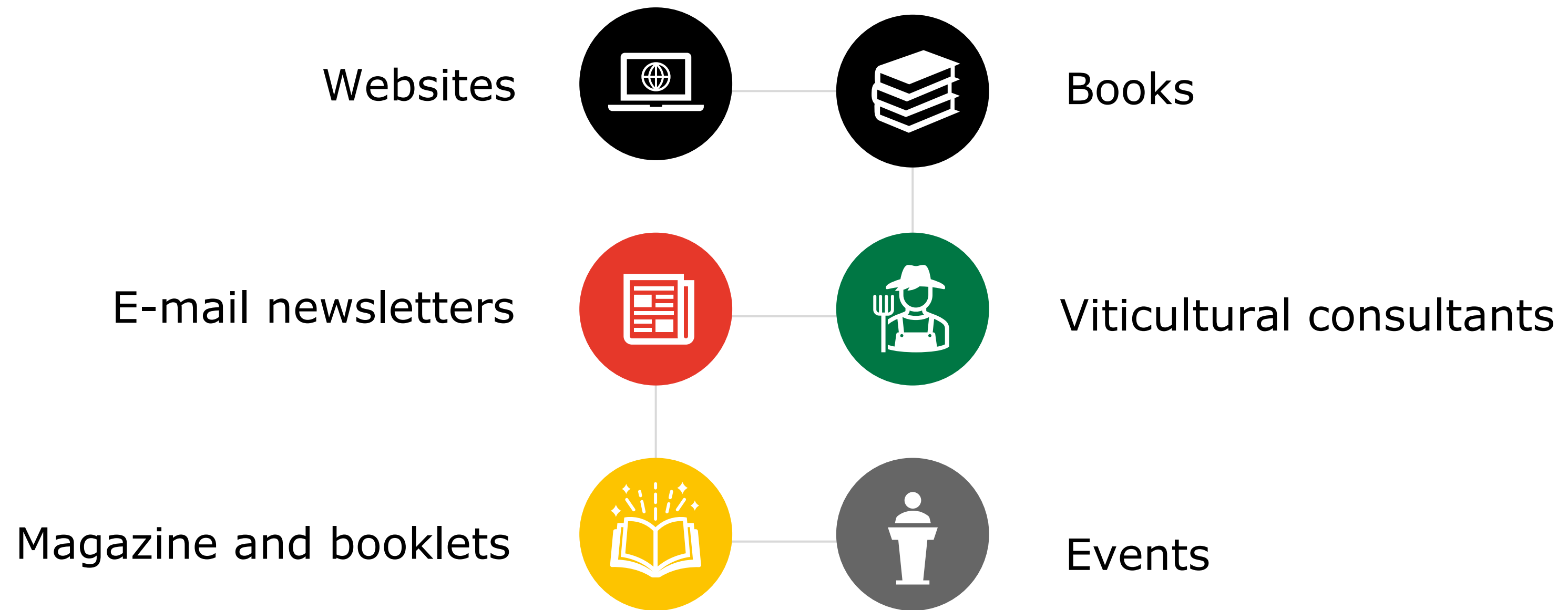
AGRIGENESIS

VENTURE BUILDING STUDIO

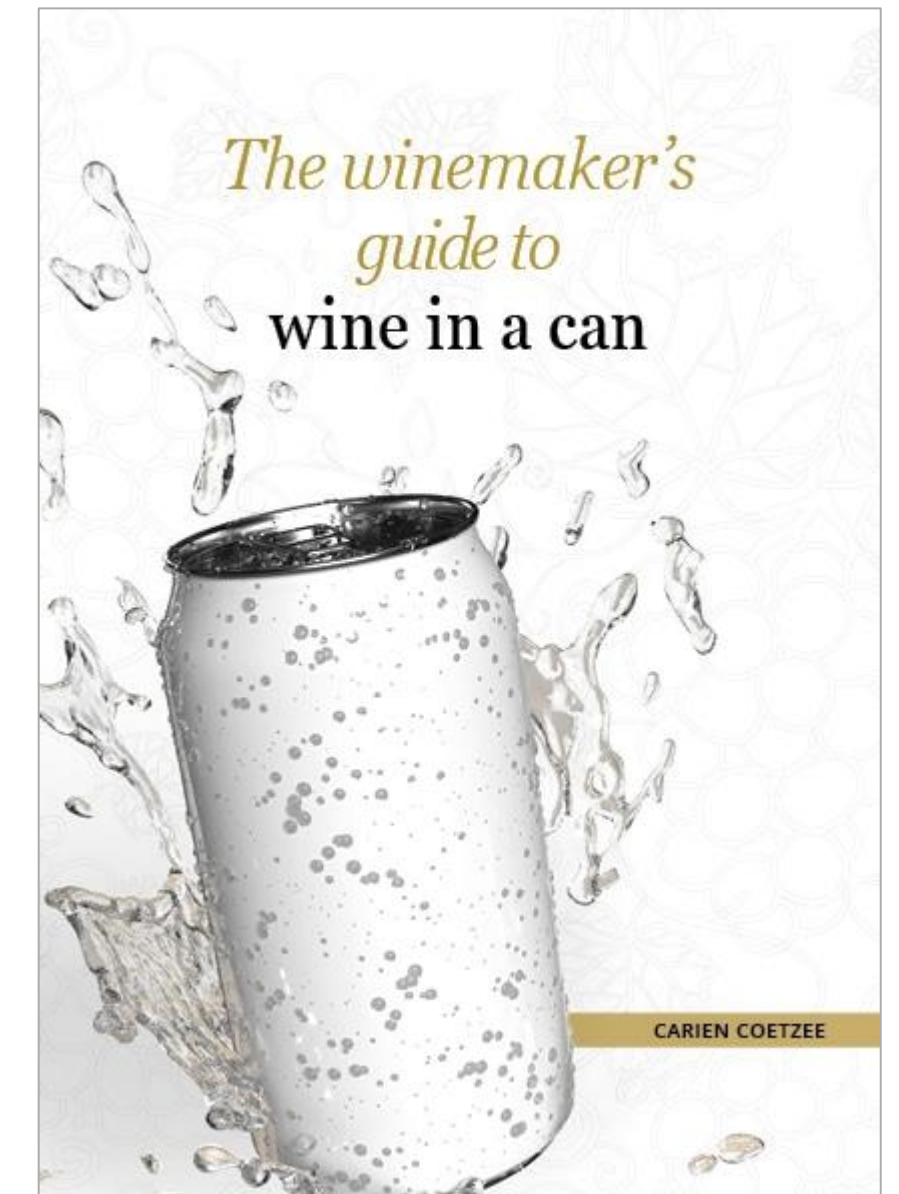
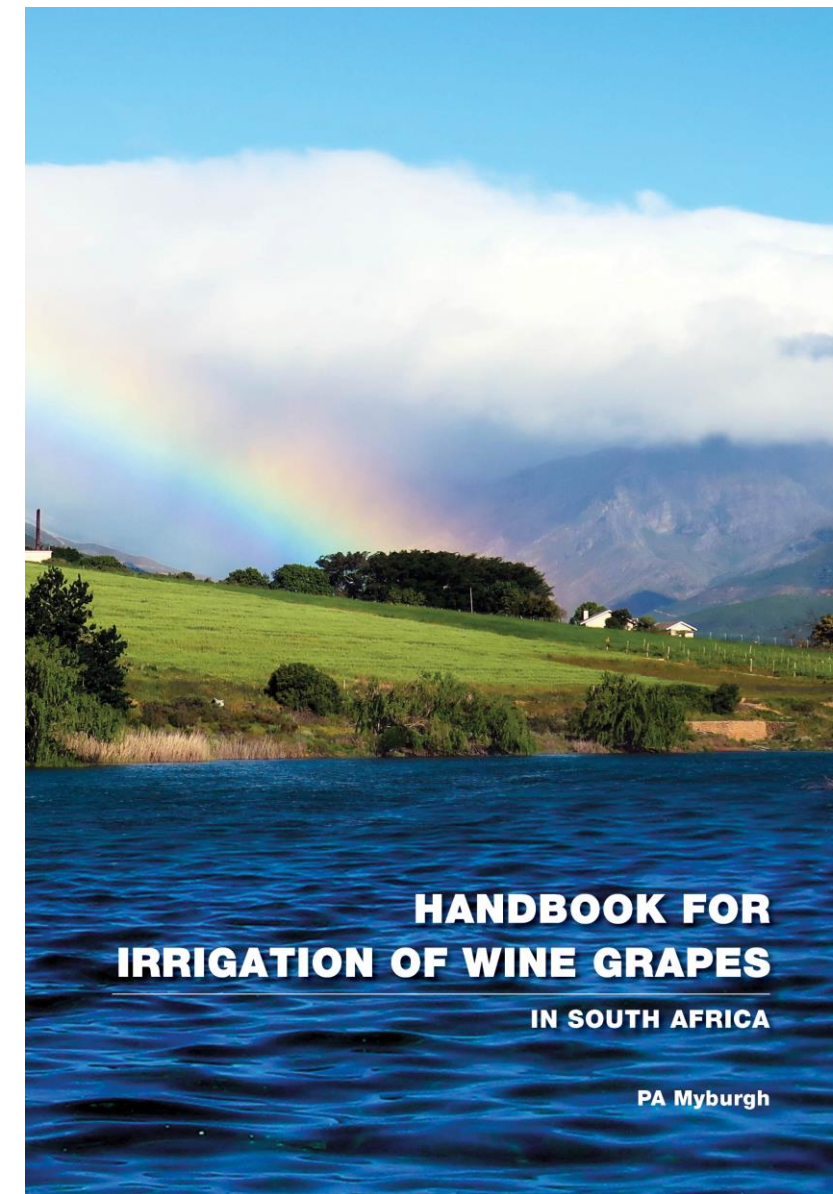
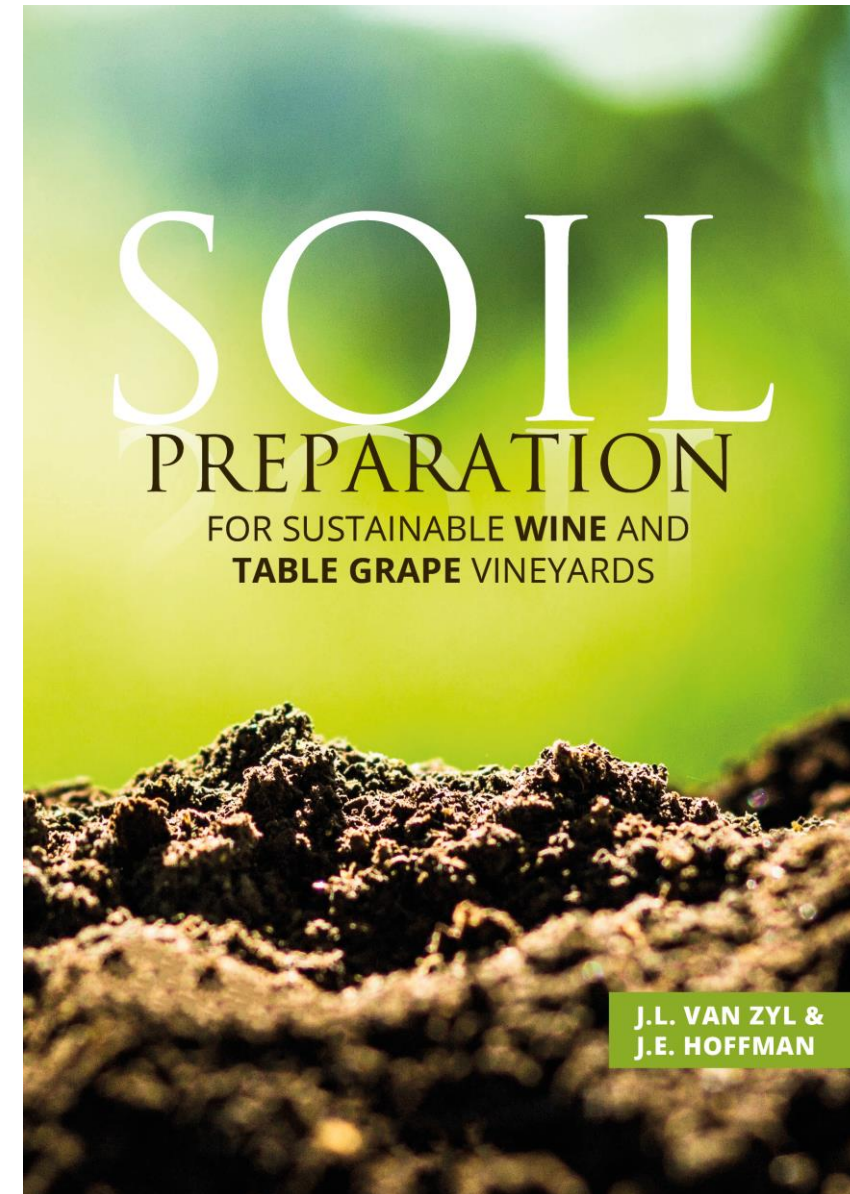
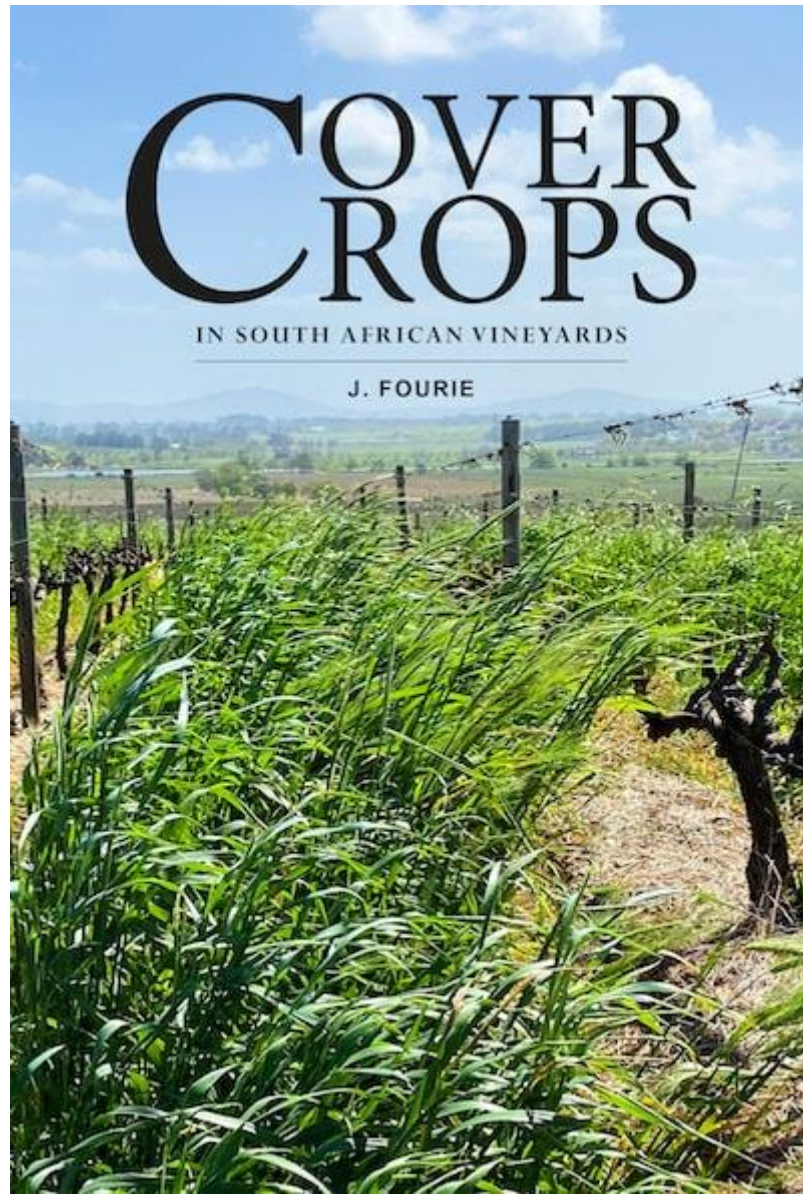
Creating Economic Opportunities from Research and Innovation

KNOWLEDGE TRANSFER

We make use of various **one-directional** and **interactive** knowledge transfer channels to transfer new and existing information as widely as possible.



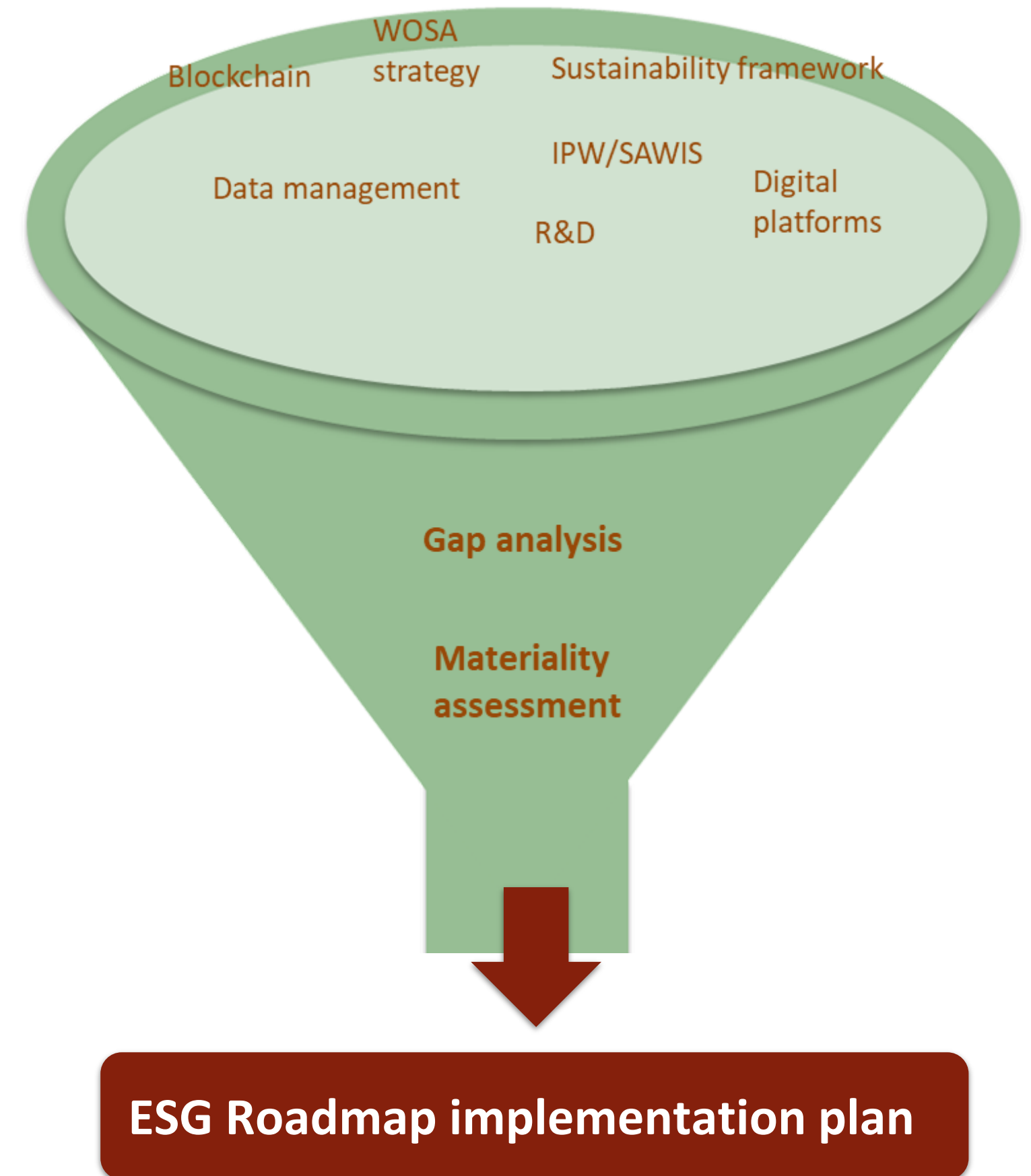
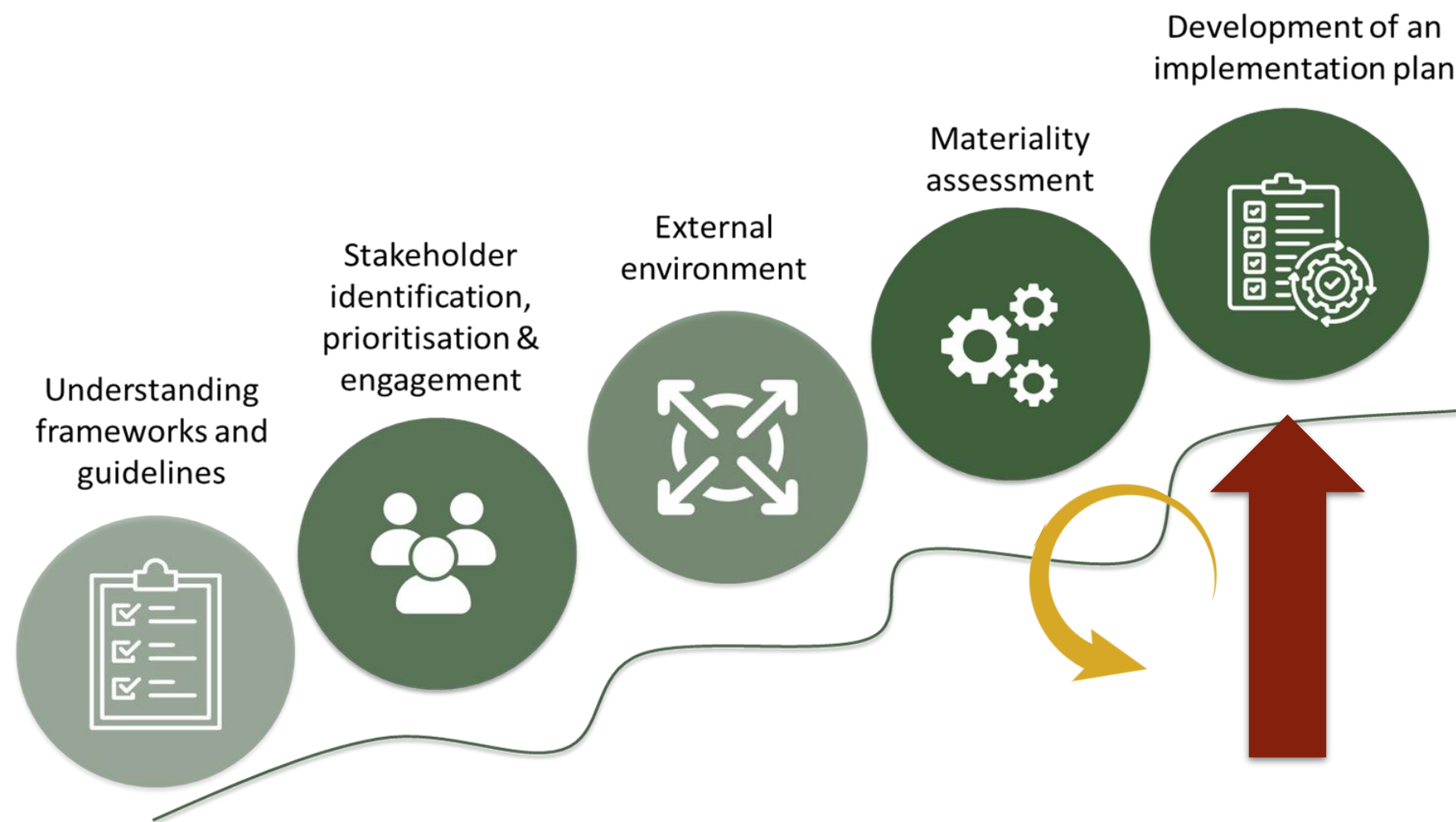
BOOKS



Purpose – ESG Roadmap

Measurement and reporting of Material Issues to improve the sustainability of SA wine farms:

- Market access – reducing barriers to entry
- Navigating the market dynamics (shifting goal posts)
- International value recognition and perceptions
- Risk identification and management
- Effective, productive and profitable farming practises
- Benchmarking (healthy competition)



Material issues – status, successes & action plans for shortcomings

Environment

Climate & carbon

- Water
- Biodiversity
- Carbon
- (Soil)

Waste & circularity

- Recycling
- Reuse

Social

Human rights

- Working conditions
- Training/education

Transformation

Governance

Regulatory compliance

- International & local compliance

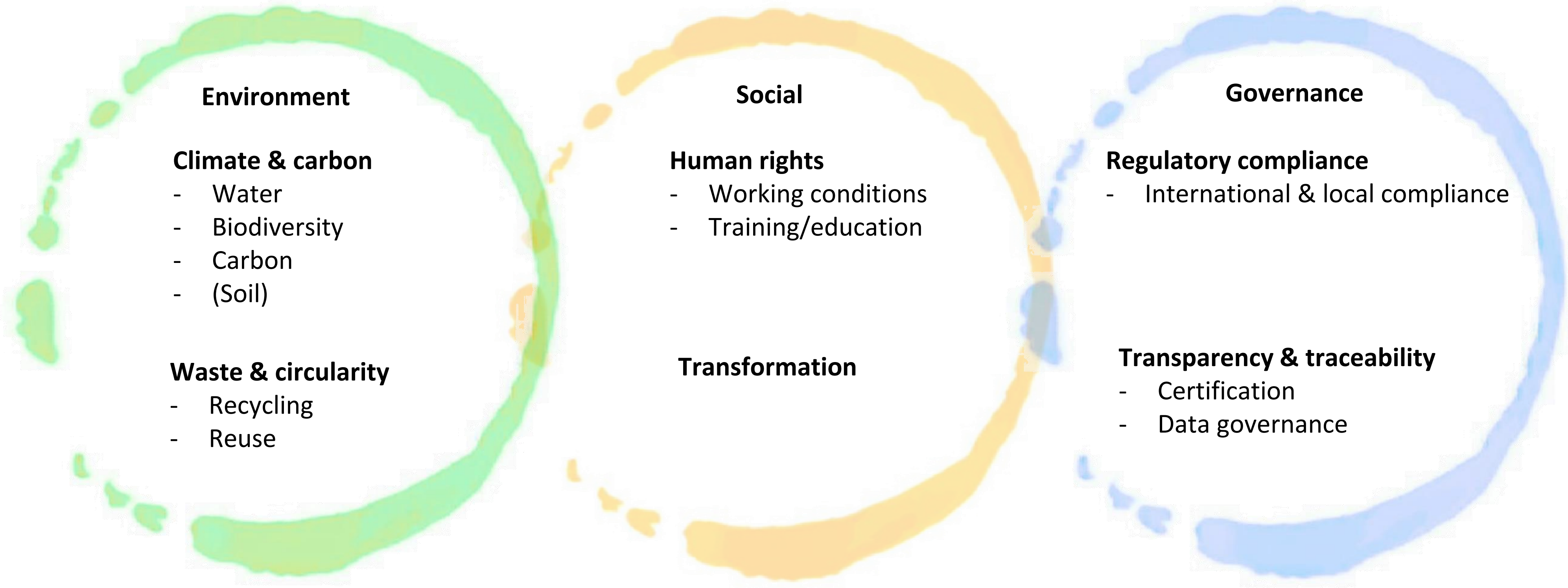
Transparency & traceability

- Certification
- Data governance

Linkages



Material issues – status, successes & action plans for shortcomings



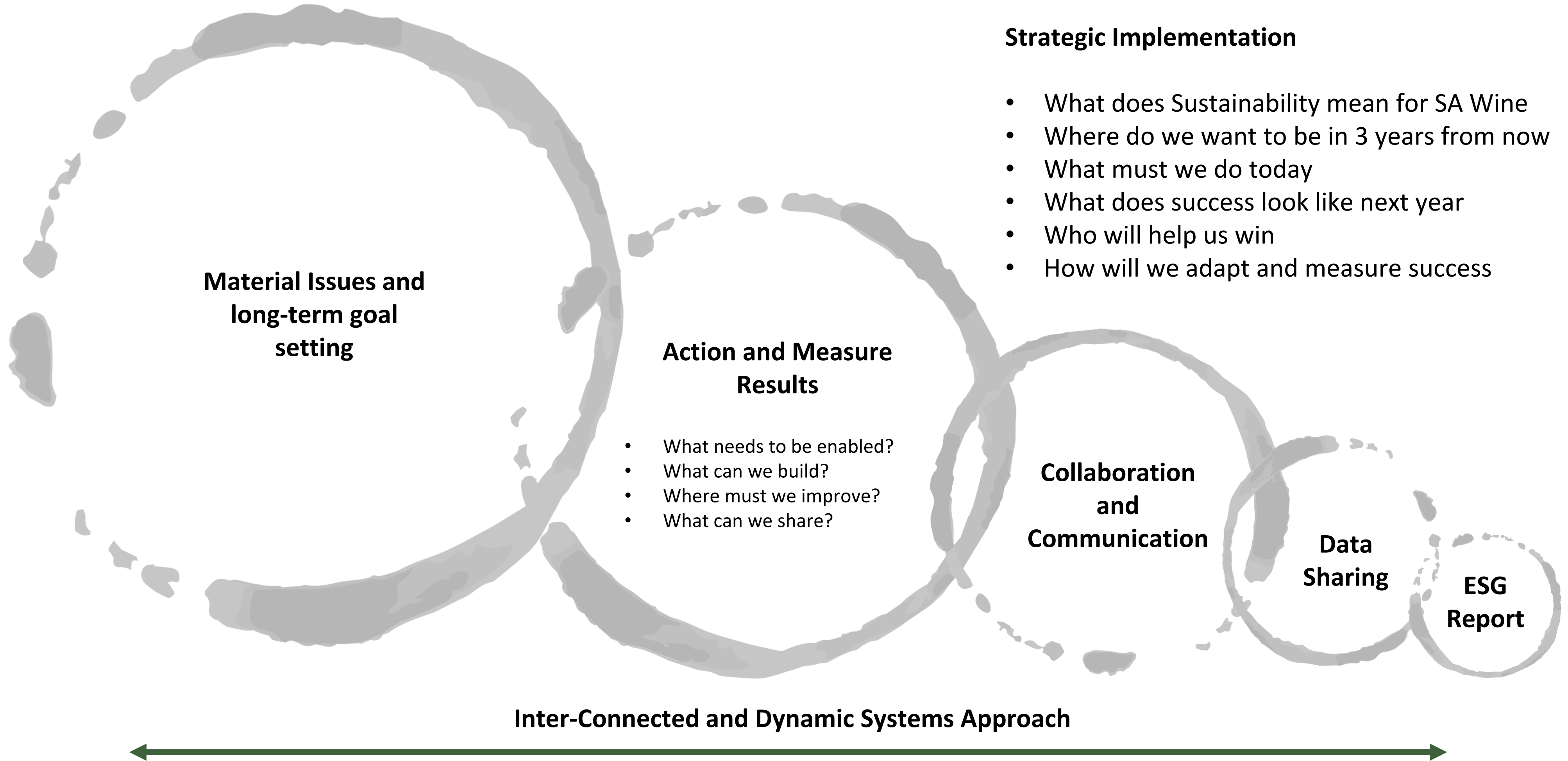
Data starting point:

More detail:

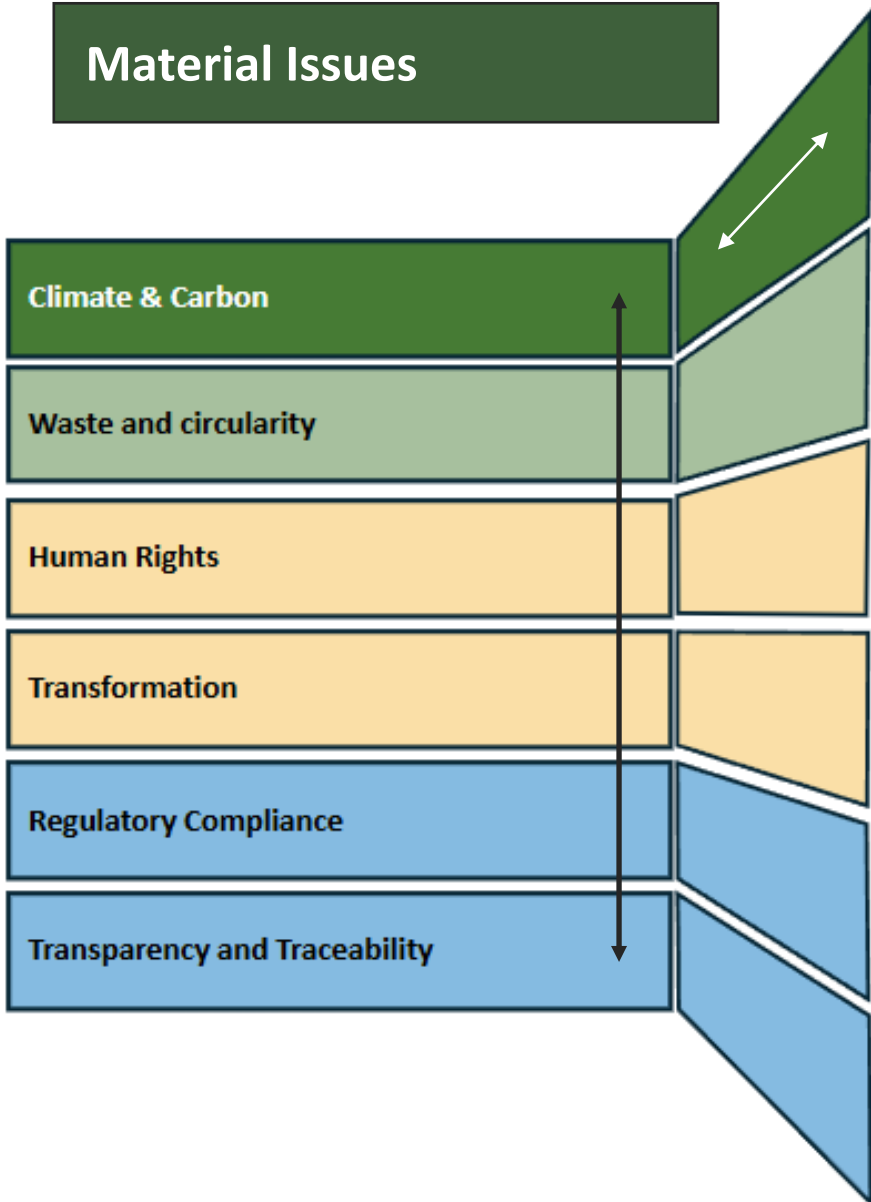
Barrier:
Data format and sharing



ESG Roadmap : Principles, Process and Prioritisation

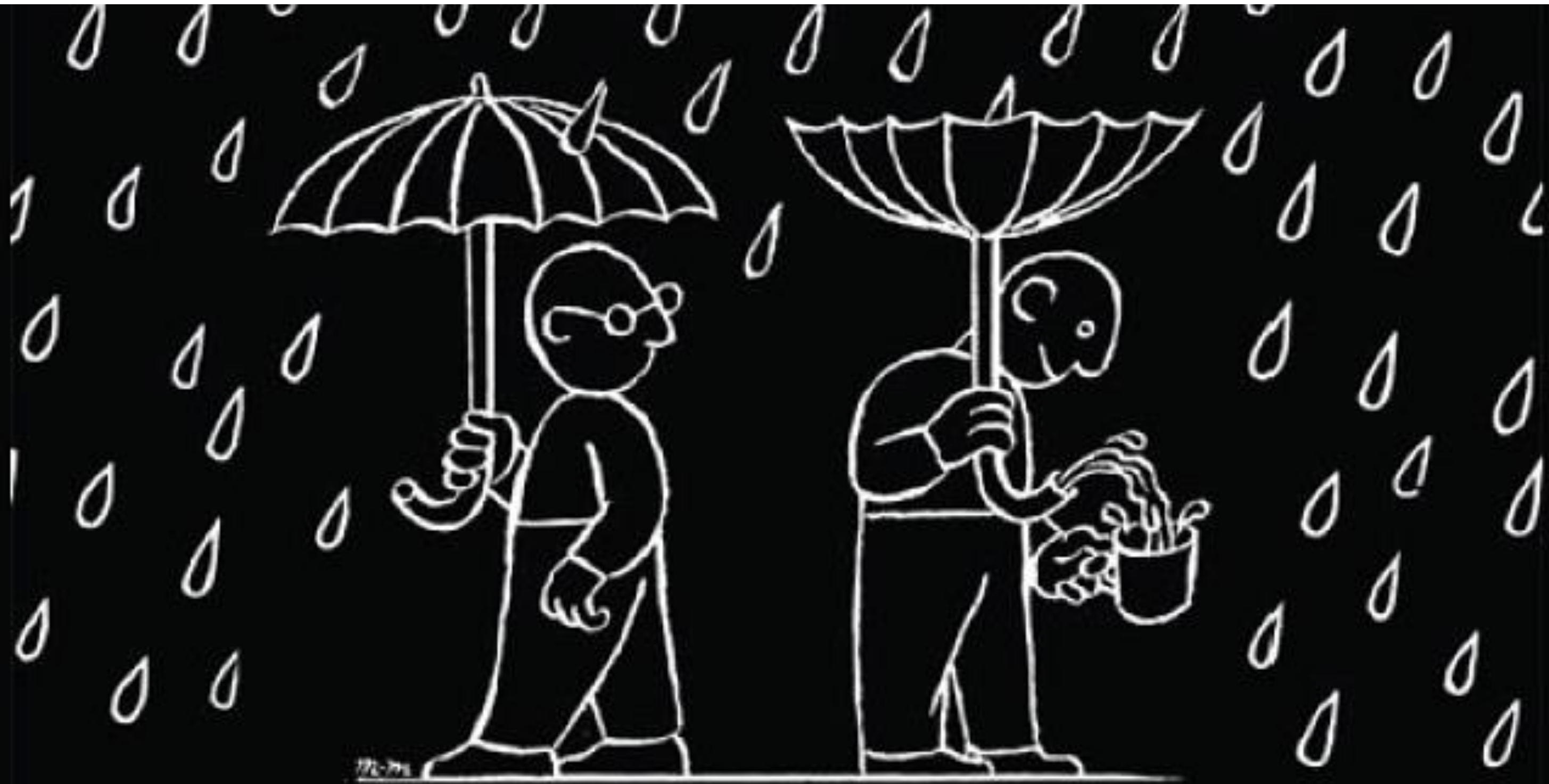


ESG Roadmap : Setting Issue-based Targets



| Objectives | 2024 | 2025 | 2026+ |
|--|--|--|-------|
| To improve the environmental sustainability of production processes | Identify measurements already recorded and available for use and extent of members recording these. | Determine specific targets in terms of members recording data to support industry representation in data presentation. Establish industry performance baseline and improvement targets. | |
| To build a baseline of what climate-smart practices are in the context of the industry | Define "climate-smart" agriculture in the SA wine context. Define key indicators for each process and identify measurements already recorded and available for use and extent of members recording these. | Determine specific targets in terms of members recording data to support industry representation in data presentation. Establish industry performance baseline and improvement targets. | |
| Enable resource use efficiency and performance tracking across the production chain. | Establish baseline of resource use monitoring data availability and extent of members reporting on resource use. | Determine industry resource efficiency performance baseline. Identify targets to expand data input. | |
| Share success-stories of climate-smart practices within the industry | Identify a small and large producer and gain approval for case study. | Publish case study and communicate success story with industry. Identify 5 more stories. | |

| Result Measures | Q4 2024 | Q1 2025 | Q2 2025 | Q3 2025 |
|---|---|--|---|--|
| Identify measurements already recorded and available for use and extent of members recording these. | Engagements with IPW, GlobalGap and SIZA to establish data metrics available and willingness to share in a aggregated and anonymised manner | Engage with a wider shareholder group which include retailers and exporters. Gather data metrics and document findings | Publish baselines result measurements. Define gaps and engage with stakeholders to source information. | Document data metrics to fill gaps for reporting which align to industry targets. Initiate data gathering process to report on gaps. |
| Define "climate-smart" agriculture in the SA wine context. | Proposed definition shared with sustainability task team for inputs and further refinement. | Define Climate Smart for both producers and external stakeholders. Craft definition to communicate throughout the value chain. | Measure communication results and feedback from value chain role-players. Learn from feedback and refine process for improvement. | Publish amended definition based on industry feedback and inputs. Communicate achievements both locally and internationally. |
| Define key indicators for each Climate Smart process and identify measurements already recorded and available for use and extent of members recording these | Consultation with IPW regarding data sharing under an MoU and / or data governance framework. GlobalGap willing to participate in the project | Finalise data governance framework and sharing agreements to commence with data analysis and reporting | Engage with key stakeholders on baseline results to gain inputs for defining target setting. | Publish and communicate Climate Smart industry targets in alignment with other material issues. |
| Identify a small and large producer and gain approval for case study. | Identification of DGB as proposed producer to participate in a Carbon Verification case study | Publish case study for distribution whilst engaging with a smaller producer to craft stories. | Publish stories from smaller producers on how they are adopting climate smart practises | Craft and share more stories from producers as well as how SA Wine has progressed with the ESG roadmap. |



INNOVATION IS A STATE OF MIND



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THANK YOU