REVIEW 2025

INCLUSION AND DEVELOPMENT

rewriting our future

SOUTH AFRICA WINE

discover diversity in a glass

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FOREWORD

With supporting results from previous years, 2025 has been a year of visible changes in our industry. It was also the end of the 2022-2025 levy cycle and calls for broader reflection.

While parts of the traditional vineyard footprint are under pressure and, in some cases, contracting, a different movement is taking shape alongside it. New entrants, particularly black-owned brands and producers, are stepping into the industry with energy, innovation, and a strong sense of purpose. These are not marginal players; they are increasingly contributing to how the industry evolves.

The equity conversation is no longer only about access or representation, but about who is actively influencing the future of the industry, who is building businesses, and who is creating value within the system.

Across the work we support, we are seeing individuals and enterprises identifying opportunities that were previously untapped, new markets, new products, new ways of positioning South African wine. These efforts are not replacing what exists, but they are adding depth and diversity to it.

This progress is supported by partnerships across Government, private sector, and development finance, and by the sheer determination of the businesses themselves. Together, this is contributing to an industry that is becoming more resilient, more representative, and better positioned for long-term sustainability.

> This progress belongs to all of us, and it carries both incredible intent and significant momentum.

This progress is reflected in the scale and reach of the work:

- Businesses are now accessing markets across Europe, North America, Africa, and Asia.
- A growing base of 107+ black-owned brands and ±80 farms are actively supported across the value chain.
- New ownership pathways are emerging, with 6–8 black-owned cellars in development.

Karin

Karin Kleinbooi
Executive Manager: Inclusion and Development
South Africa Wine

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1 INTRODUCTION

ABOUT THIS REVIEW

This review reflects a year where inclusivity and development have become more tangible and demonstrates how far we have come as an evolving industry.

Progress is increasingly visible in the form of businesses operating in markets, farms moving into improved production, and individuals building careers within the sector. These are practical outcomes that show movement beyond early-stage support into more sustained participation.

At the same time, the context remains challenging. The number of smallholder producers remains high relative to their market share, and the demand for funding continues to exceed available resources. This reinforces the need for a more coordinated and strategic approach to support.

The focus is therefore shifting from enabling entry to ensuring sustainability and competitiveness. And sustainability is grounded in modest gains forged in replicable lessons.

This progression is measurable:

- 7 wineries are in various stages of planning, acquisition or establishment.
- 5 wine brands have graduated into full commercial participation.
- 3 wine grape producing farms have reached semi-commercial production.

SUSTAINABLE AND RESPONSIBLE GROWTH

With more than 100 black-owned brands and a growing base of 80 wine grape producers operating at different stages of development, the structural realities remain:

- Approximately 80 black farmers still account for less than 2.4% of market share.
- Funding demand exceeds supply, with R270M+ in identified capital requirements by those who applied to South Africa Wine and its partners for assistance.

In an industry that has uprooted more vines than it has planted in the past 17 years, new entrants recognise their need to help reverse the current trend and shine with innovation. Taking advantage of the changes they see, black winemakers and experts have challenged the trend by offering a new story to consumers. However, it is not enough to promote a diversity story without a world-class product. The accolades won by black operators in 2025 and before, are self-evident. We wish to see these businesses sustainable.

Sustainability, in the context of new wine and grape businesses, is complex. It requires capital, capability, access, and time – often more time than the system comfortably allows. Our work, therefore, is to support entry and to create the conditions under which businesses can remain, stabilise, and ultimately compete.

In an impact assessment of the first five years of Vinpro's new farmer support programme, we learned that adaptive capacity is at the core of creating sustainable businesses. We found that our capable partners at Vinpro not only fill the technical role, but they connect the industry to new entrants. The wine industry is an established system that new entrants would otherwise find difficult to penetrate. In our partnership with Vinpro through our inclusive growth function, we seek to bridge the gap between the existing and the new. To do this, we have not only learned to function collaboratively, but also faster and more efficiently.

In 2025, efficiency received a significant boost when Artificial Intelligence settled into the inclusive growth domain. Leaps in promotion design, data availability and processing, business due diligence and AI-aided decision-making saw South Africa Wine employing new tools to improve its outputs.

OUR VISION FOR INCLUSION AND DEVELOPMENT

Our vision is to build an industry where those who enter are able to grow, compete, and remain. This means that black-owned brands and farms are visible and operate with confidence across the value chain.

It also means recognising that equity is not a once-off intervention, but an ongoing commitment, one that depends on consistent investment, relevant support, and real access to opportunity. For South Africa Wine, this means embedding opportunity into how the industry works, so that black-owned enterprises are not on the margins but part of its core.

In 2025, this is becoming more evident in practice. More than 100 black-owned enterprises are showing signs of growth. Partnerships are more aligned, and there is greater coordination around what support is needed and when. At the same time, more individuals are finding their place in the industry and progressing within it.

At the heart of this work is a straightforward focus: ensuring that the people building this industry have the knowledge, capital, and fair opportunities they need to sustain their businesses and grow them over time.

Klein Goederust 100 tonne cellar launch. (5 December 2025).

Visit Paul Siguqa's Klein Goederust, Franschhoek's first black-owned wine farm. Paul's mother was a farmworker, and he grew up in the region. The farm is more than 100 years old, and today it produces Chenin Blanc, a peppery Shiraz, a vibrantly fruity Noble Late Harvest, and a Cabernet/Merlot blend. All can be enjoyed alongside a meal at the cellar's restaurant run by chef Linda Abrahams, a.k.a. Aunty Linda.

– Time Magazine Worlds Greatest Places, 2022

THE STRATEGY IN MOTION

A key development this year has been the move towards a more structured approach to support. Enterprises are being supported according to their stage of development, with clearer pathways from early incubation through to market participation and, in some cases, independence. This reduces fragmentation and improves the sequencing and effectiveness of interventions.

Alignment with partners has also strengthened, particularly across government and financial institutions. This is helping to ensure that funding, technical support, and market access are more closely linked.

This structured approach is now reflected in:

- 51 enterprise applications assessed across funding streams.
- 24 enterprises approved for support.
- Increasing alignment with CASP, DEDAT, DTIC, Land Bank, and private and development sector partners.

This evolution marks an important change. Inclusive growth is no longer being delivered as a collection of programmes but rather taking influence as a system.

CapeWine2025

2 ENTERPRISE DEVELOPMENT

A YEAR OF CONSOLIDATION AND INTENT

Enterprise development in 2025 reflects a more mature pipeline of businesses.

Applications received this year show a clear shift towards growth-oriented investments, including infrastructure, vineyard development, and market expansion. This indicates that many enterprises are moving beyond initial setup and are now focused on scaling.

At the same time, the gap between funding demand and available resources remains significant. This is evident in the scale of engagement:

31 brand applications reviewed	13 farm applications assessed	7 CASP projects evaluated

This is one of the key constraints to growth and highlights the importance of unlocking additional funding mechanisms.

THE WINE ARC – CONCEPT TO CATALYST

The Wine Arc continues to evolve as a practical support platform for brand development and market readiness. It is increasingly focused on preparing businesses for commercial realities, ensuring that product quality, brand positioning, and market engagement are aligned. Through partnerships with industry players, it is creating more direct pathways into markets. Thirteen brands have been transitioned out of The Wine Arc, graduating from the programme in 2025. This reflects its growing effectiveness as a pipeline for commercially viable businesses.

With a new intake of brands and strengthened partnerships, including collaboration with Sigma International, the model has matured into a platform that connects:

- product to market
- brand to buyer
- ambition to execution
- 13 brands have graduated from The Wine Arc.
- 15 new brands onboarded in 2025.
- Expanded partnerships now include 35+ industry collaborators.

The intent is well-defined: to move businesses beyond visibility, towards viability.

"There are more black winemakers in leading jobs than ever before."

– Tim Atkin, A Fair Deal (16 April 2025)

"When I grew up, my only reference to wine was that God turned water into wine and that fascinated me and shaped my career ambitions."

– Mahalia Kotjane, South Africa Wine (2025)

SOUTH AFRICA WINE

Jonathan Hohnson, Tim Atkin, Tania Mkhaphe, Gift Zothana pause for a huddle while arranging a tasting for Black-Owned Wine Brands (3 July 2025).

SOUTH AFRICA WINE

Mahalia Kotjane presents her Syrah to international premium wine buyers at the Wine Arc (6 March 2025).

THE REALITY OF DEMAND

One of the most telling indicators of progress is not what has been funded, but what is being asked for.

In 2025, funding applications revealed a significant pipeline of ambition, tens of millions in requested investment, projects spanning infrastructure, vineyards, and market expansion, and enterprises increasingly prepared to scale.

R48.8M requested in farm funding vs R4M available	R2.96M approved across 6 farms	R45M+ requested for farm infrastructure alone

The gap between available funding and demand is a signal that the industry is no longer short of ideas but in need of capital aligned to growth.

MARKET ACCESS – INTENTION MEETS REALITY

Market access remains one of the clearest measures of progress.

Participation in platforms such as ProWein, CapeWine, and other trade engagements has moved beyond symbolic representation. It is now translating into export revenue, distribution agreements, and sustained buyer relationships. The expansion into markets across Europe, North America, Africa, and Asia reflects growing confidence in product quality and in brand positioning.

- **5** major exhibitions funded
- **13** brands supported
- Export markets expanded across **17+** global destinations
- New agreements secured in Canada, Mozambique, the Maldives, and Europe.

This is where inclusion becomes tangible.

South Africa's stand at ProWein in Dusseldorf (18 March 2025).

GRADUATION AND THE LANGUAGE OF INDEPENDENCE

Perhaps the most significant milestone in enterprise development is the point at which support is no longer needed in the same way. In 2025, several brands reached this threshold – moving into a space of semi-commercial independence, with established markets and repeat demand.

This marks an important shift in their development journey.

> "Born in Soweto, Antoinette first embarked on an artistic journey with interior design. But when COVID-19 hit, her world totally changed. She, together with her husband Marc, started mapping out the vineyard in the picturesque valley in Stellenbosch. And their timing couldn't be any better, with the premium wine scene gaining traction in SA, the pair started their joint venture in creating high-quality wines that symbolise love and togetherness."
>
> – ProWein Dusseldorf (16 May 2025)

These brands are now active across multiple international markets across four continents, maintaining sustained export activity and growing commercial stability.

Graduation, in this context, is not an endpoint, but rather a transition. It signals a move from intensive support to lighter touch interventions, where earlier investments by South Africa Wine and its partners are now being leveraged. The focus shifts towards enabling continued growth, reinforcing market presence, and supporting businesses as increasingly self-sustaining participants within the industry.

OWNERSHIP: THE DEEPER TRANSFORMATION

Beyond brands and markets, a more structural change is underway. The emergence of new black-owned cellars – alongside farms reaching semi-commercial scale – signals a significant and unique movement towards, ownership within the value chain.

- 6-8 black-owned cellars in development
- 3 wineries now operational
- 5 secured external funding

This is a different kind of progress, slower, more capital-intensive, and more complex.

But it is also more enduring, because ownership changes not only who participates in the industry, but who holds value within it.

3 PEOPLE DEVELOPMENT

TOWARDS FUTURE-FIT CAPABILITIES

If enterprise development influences businesses, people development influences the future readiness of the industry. And the future, by its nature, requires patience. Building skills is a gradual process, and career growth does not always progress linearly, many times people become cross-functional especially in agricultural businesses. In 2025, there is clear evidence of a strong commitment to growth and a shared responsibility to remain relevant in an evolving industry, supported by a developing and structured talent pipeline.

A SYSTEM OF LEARNING

The expansion of the Learner Management System and the Professional Body reflects a shift towards formalising knowledge within the industry, while promoting a stronger learning culture that encourages blended approaches and moves beyond traditional methods of learning. With thousands of users and an expanding catalogue of programmes, learning is becoming more accessible, more structured, and more aligned to real career pathways. This is no longer ad hoc training, but a move to a professional ecosystem.

TRAINING TO TRAJECTORY

There is an important evolution in how skills development is being approached. The focus is moving beyond participation in programmes, towards progression through them.

Graduate placements, bursaries, and technical training are connecting through a continuum that supports individuals as they move into and through the industry value chain.

- Bursaries supporting 9 students (-R845K investment).
- Graduate placement and training programmes expanded.
- Leadership development identified as the next priority.

PEOPLE DEVELOPMENT BUDGET 2026 Skills development R4m | SAWIPB R1.9m		
Skills development	**Training projects**	**SAWIPB**
Graduate placement, leadership programme, brandy training programme R4m	Industry training (bursary programme) R981 462	Knowledge donation (CPD), designations R1.9m

WHO WE SERVE	107 brands	70 farmers growing grapes	11 tourism businesses	11 processing of grapes	1 bulk wine business

Representation and responsibility

Progress in representation – particularly in terms of gender – is encouraging. But representation alone is not the end goal. The next challenge is to ensure that this diversity is reflected at decision-making levels, where influence and direction are exercised.

- 37% female representation across supported enterprises.

3 INDUSTRY ADVISORY

GUIDANCE TO ALIGNMENT

Industry advisory has moved from providing answers to creating alignment among partners, funding mechanisms, enterprise needs, accredited BEE advice and market realities.

Support now coordinated across government, finance, and private sector partners.

Advisory extends beyond funding into compliance, governance, and investment readiness.

In a space where multiple stakeholders operate simultaneously, coordination becomes as valuable as capital.

THE POWER OF PARTNERSHIP

What defines 2025 is the depth of partnerships, and not only their presence. Across government, finance institutions, and industry bodies, collaboration is more intentional. Not simply working alongside one another, but working in sequence:

- funding aligned to readiness.
- support aligned to stage.
- interventions aligned to outcomes.

Key partners include:

- NAMC, DEDAT, WCDoA, DTIC, DRDLR (LDS)
- Land Bank, FNB EdgeGrowth, EU Wine and Spirits Fund Steering Committee
- Vinpro, WoSA, Wesgro, Sigma International

These partnerships unlock scale.

SOUTH AFRICA WINE

DLRRD, CASP, South Africa Wine and Casidra partnered on a project to secure the safety of the dam on Klein Morewacht, a proactive land acquisition farm (20 November 2025).

INTEGRATION, NOT ISOLATION

Doctoral research is underway with the University of South Africa to help ensure effective integration of budding talent and entrepreneurship into the wine business cluster. There is a growing recognition that inclusivity and diversity cannot exist on the margins. Black-owned brands and farms are not separate from the industry. They are part of it. The work, therefore, is not to create parallel systems but to ensure full integration into existing ones. This is a significant shift.

"Wine producers are genuinely trying to improve a country they love. I've lost count of the number of wineries that have invested in their communities, often without fanfare or an eye on media coverage."
– Tim Atkin, A Fair Deal (16 April 2025).

3 SOCIO ECONOMIC DEVELOPMENT

THE ETHICS OF SUSTAINABILITY

In a global market, ethical practice is a necessity that directly supports market access.

WIETA certification contributes to credible, responsible practices, with producers certified, supported, and progressing. This reflects our commitment to building a credible, responsible, and competitive industry.

- 15 producers WIETA certified.
- 7 receiving support.
- 3 progressing through certification.

BEYOND PRODUCTION

Socio-economic development extends beyond vineyards and cellars. It touches workers, families, and communities. And it is visible in improved conditions, access to opportunity, and a growing sense of dignity within the industry. This is closely linked to the industry's commitment to ethical practice and compliance, with standards such as WIETA reinforcing fair labour practices, accountability, and the wellbeing of those who sustain production.

Agri's Got Talent continues to remind us that the strength of our industry lies in its people. Beyond the vineyards and cellars, it creates a space where farm workers, whose daily work sustains production, are seen, heard, and celebrated for who they are beyond their roles.

For many participants, it is an opportunity to step forward with confidence, to share their talent, and to be recognised in a different light. It brings together communities across farms and regions, building pride and connection in ways that extend well beyond the stage.

In recognising our vineyard and cellar colleagues, we honour the contribution of those who work the land, take care of the vines and handle the wine, recognising that their immeasurable skill, effort, and pride in their work are what hold this industry together and carry it forward.

THE HUMAN MEASURE OF PROGRESS

Not all impact can be captured in numbers. Some of it is found in muted changes, such as confidence gained, skills developed, and opportunities realised. These are the outcomes that find real expressions in lives that are changed.

Impact is both measurable and human.

129 jobs created or retained

96 beneficiaries reached

16 youth participants supported

Agri's Got Talent 2025

6 WHAT WE SPEND

Behind every intervention lies a deliberate allocation of resources to fund activity and enable progression.

In 2025, investment across the inclusivity and development portfolio reflected a careful balance between reach and depth. Funding was directed towards enterprises and individuals at different stages of development, ensuring that support was both responsive and impactful.

- Total vetted programme portfolio: R271.7 million.
- Total funds deployed to date: R51 million (19%).
- Co-investment leveraged: R5 million+.
- Total beneficiaries reached: 96 enterprises.
- Jobs created and retained: 129.

Funding was channelled across key areas:

- Enterprise development (brands and farms)
- Market access and export readiness
- Skills development and professionalisation
- Infrastructure and production support
- Ethical compliance and certification

What becomes clear is that funding is increasingly being used as a catalyst, unlocking additional capital, enabling partnerships, and supporting enterprises beyond initial entry into sustained commercial participation.

> THIS IS TRULY ABOUT HOW MUCH IS SPENT, AND HOW EFFECTIVELY THAT SPENDING TRANSLATES INTO LONG-TERM VIABILITY.

LOOKING AHEAD: 2026

The transition into a new statutory levy cycle (2026–2029) marks an important moment of continuity and expansion. With a renewed funding horizon, the focus shifts towards deepening the work already underway and strengthening the systems that support it.

A key priority will be the implementation of EU and other blended funding mechanisms, enabling greater alignment between available capital and the growing demand for enterprise development, infrastructure, and market access. This is expected to unlock new opportunities for scale, particularly for businesses that have progressed beyond early-stage support.

At an industry level, further work will be undertaken to formalise and designate vital roles across the value chain. This reflects a continued move towards professionalisation, ensuring that capability, standards, and accountability are embedded more consistently across production, governance, and market participation.

Across all areas, the emphasis remains unchanged. The work is no longer only about enabling entry, but about strengthening what has already been established, ensuring that businesses, people, and systems are positioned to endure and compete over the long term.

7 CONCLUSION

A YEAR OF MOVEMENT AND MOMENTUM

2025 reflects a more grounded phase of inclusivity and development within our industry.

The sector is adjusting to constraints and opportunities. While parts of the traditional vineyard footprint are under pressure, new entrants are increasingly visible, bringing renewed energy, different approaches to market, and a willingness to explore opportunities that were previously untapped. This combination is not disruptive for its own sake; it is contributing to an industry that is evolving in practical and necessary ways.

There is still significant work to be done. Funding gaps remain a constraint, and long-term sustainability for many enterprises is not yet secured. These are structural challenges that require continued focus and coordinated effort. At the same time, there is clear evidence of progress. The industry is becoming more diverse in its participants, more adaptable in how it responds to change, and more open to new ways of creating value. It is a competitive strength.

The progress achieved to date reflects the contribution of many stakeholders, businesses, partners, funders, and institutions, working together towards a more inclusive, sustainable industry and a wine legacy that evolves.

Inclusive growth remains a collective effort.

8 MEET THE TEAM BEHIND THE WORK

Behind the progress is a team working across strategy, partnerships, and delivery, connecting people, programmes, and possibilities.

Philip Bowes ▶ Inclusive Growth Strategies Manager

Brunhilda Brinkhuis ▶ Enterprise Development Coordinator

Eden Marlaine du Plessis ▶ People and Skills Development Officer

Karin Kleinbooi ▶ Executive Manager: Inclusivity and Development

Natasha Lodewyk ▶ Administrative Assistant

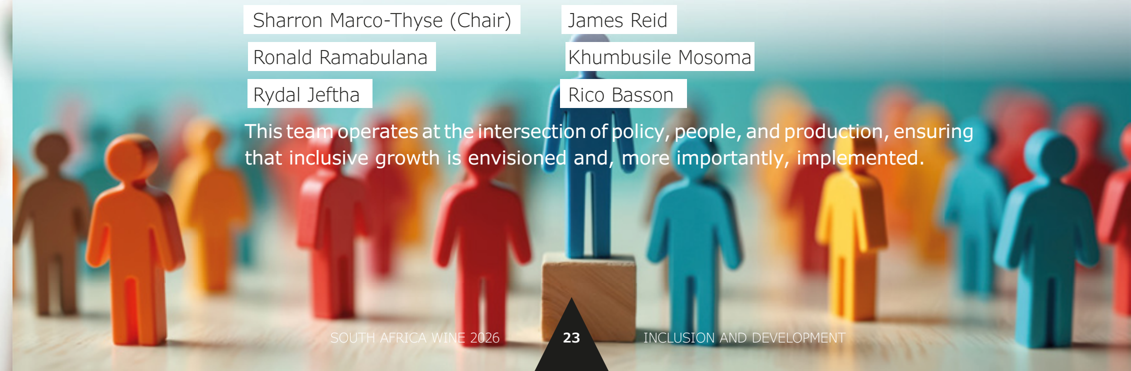
Kachné Ross ▶ People and Skills Development Manager

GOVERNANCE AND OVERSIGHT

The work is guided by a diverse Inclusion and Development Committee, ensuring accountability, representation, and strategic direction:

- Sharron Marco-Thyse (Chair)
- James Reid
- Ronald Ramabulana
- Khumbusile Mosoma
- Rydal Jeftha
- Rico Basson

This team operates at the intersection of policy, people, and production, ensuring that inclusive growth is envisioned and, more importantly, implemented.



We grow the team that grows the wines, the economy, and the national brand.

We hope this **Year In Review** will inspire questions, partnership and joint success, not only to support the enterprise we serve, but to work with South Africa Wine on a journey of measurable results in the years to come.

WE APPRECIATIVELY ACKNOWLEDGE THESE AND OTHER PARTNERS FROM OUR 2025 JOURNEY:

- Agricultural Broad-Based Black Economic Empowerment Fund (Agri-BEE Fund)
- Agricultural Research Council (ARC)
- Department of Rural Development and Land Reform (DRDLR)
- Department of Trade, Industry and Competition (DTIC)
- European Union (EU)
- First National Bank in collaboration with EdgeGrowth
- Hortfin
- Land and Agricultural Development Bank of South Africa (Land Bank)
- Levy-paying wineries and farms
- National Agricultural Marketing Council (NAMC)
- Nedbank
- Sigma International
- Vinpro
- Western Cape Department of Agriculture (WCDoA)
- Western Cape Department of Economic Development and Tourism (DEDAT)

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discover diversity in a glass