



BI Daaglik - BI Daily

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Global and SA Trends

Cabinet approves plan to break Transnet's monopoly and promote competition in SA's logistics network

The Cabinet has approved a plan that seeks to break Transnet's monopoly in South Africa's logistics system and promote competition by increasing the private sector's participation in the running of the country's rail network and ports. The plan can now move towards implementation — a crucial step in attempting to reverse the dysfunction of the railways and ports in the hands of Transnet.

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Global Trends - Wine Industry Key Elements

OIV Reports That Red Wine Is Losing Its Appeal

The latest OIV report suggests that today's wine industry is taking an increasingly different view. Red wine lost a lot of ground in the 20th century and, between 2000-2004, on average, it made up 47.6% - just under half - of the global total. In 2013, nine years after the end of this period, white overtook red and has held its lead ever since. By 2017-2021, red's share had fallen even further to 42.6%, compared to 49.3% for white. Similarly, rosé – once thought of as a 'summer drink' now represents the equivalent of nearly one bottle in every 9-litre case.

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Mexicans Are Consuming More Wine – And Planting More Vines

The Mexican wine industry has a new figurehead with some ambitious plans. Salomón Abedrop became president of the Consejo Mexicano Vitivinícola (Mexican Wine Council, MMV) in 2023. He points to rising consumption and the fact that the share of Mexican wines on the domestic market share has trebled over the past two decades, from 10% to 34%.

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Alcohol ecommerce growth moderates, but still set to outperform overall market

New findings from IWSR's ongoing assessment of the alcohol ecommerce channel shows that beverage alcohol ecommerce is entering a period of normalisation following the Covid boom and subsequent post-pandemic correction, with sales in the world's leading 16 markets expected to grow at a slower pace to reach just under US\$40bn by 2027. That represents a 2022-27 value CAGR

of +4.5% – compared to the +31% CAGR recorded between 2019 and 2021. Nevertheless, this growth is expected to outpace that of total beverage alcohol across the 16 markets (on-trade plus bricks-and-mortar off-trade plus ecommerce), which is expected to see a value CAGR 2022-27 of under 2%.

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Significant negative shift seen in alcohol spending behaviour amid signs that it may be temporary

Latest data from IWSR shows that consumers are cutting back on alcohol spending as financial concerns grow and the cost-of-living crisis eats into their disposable incomes.

The shifting picture is also apparent in market performance for the first half of 2023, with beer volumes falling marginally, spirits (excluding national spirits) up +1%, still wine down -4% and RTDs up +1%.

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