



Chairman's Overview



Momentum, Mandate and a Renewed Commitment to Lead

As we close out the second quarter of 2025, I am both honoured and energised to have been re-elected as Chairman of DF-SA. I thank my fellow board members for the confidence placed in me, and I extend a warm welcome to our newly elected board colleagues who bring an incredible depth of experience and energy to the table.

This quarter reaffirmed why DF-SA exists. We released a landmark study, *Understanding the Illicit Alcohol Market in South Africa*, independently conducted by Euromonitor International. The findings placed credible, evidence-based insights into the public domain, following a rigorous peer review process. This reinforces DF-SA's commitment to scientific integrity and evidence-led advocacy.

We also concluded the Communications Code of Conduct *Small Print, Big Impact* campaign, reinforcing our collective commitment to responsible marketing and self-regulation. And we demonstrated, through platforms like the United for Good panel discussion, that industry can lead with purpose, integrity, and impact.

The sustainability of our industry rests on a foundation of trust — trust that is earned when our

actions consistently reflect our values. At DF-SA, we are committed to demonstrating this alignment through our engagement with regulators, our investment in research, and our conduct in the marketplace. We are not merely participants; we are positioning ourselves as a trusted solutions partner, dedicated to advancing the industry with integrity and purpose.

We look ahead to Q3 with focus, unity, and a shared belief that this work, challenging as it may be, is worth doing together.

We are united for good.

Richard Rivett-Carnac, Chairman, DF-SA



Board Leadership Update

Welcoming the 2025 DF-SA Board

Richard (Boris) Rivett-Carnac – CEO, SAB

Following the conclusion of the DF-SA Annual General Meeting in Q2, members re-elected Richard Rivett-Carnac, CEO of South African Breweries, as Chairman of the Board for a second term. Boris has been the CEO of SAB since January 2022, bringing 13 years of experience within the AB InBev group, including as VP of Finance, Legal and Corporate Affairs for the Africa Zone. He began his career at SABMiller in 2009 in the London M&A team and has since held key leadership roles across the business.

Ricardo Ferreira – Group CEO, DGB

Ricardo Ferreira is the group CEO of DGB, having joined the company in 2014 as operations director before becoming MD of South African business. With 26 years experience in alcoholic beverage sector, including leading roles as SABMiller, he now has a portfolio that includes iconic Local wine brands like Boschendal and Bellingham.



Andrew Ross – Managing Director, Diageo Southern Africa

Andrew Ross is the General Manager for Southern Africa and the Indian Ocean at Diageo, having joined the company in 2018 as MD of Guinness Cameroon. With over 20 years of industry experience from leadership roles at SABMiller and Dashen Breweries, he is known for driving commercial growth, developing talent, and strengthening brands.



Johan Oosthuizen – CEO, Halewood South Africa

Johan is the CEO and Group Managing Director of Halewood South Africa, which has grown into the country's fastest-growing spirits company since its establishment in 1999. With a background in accounting and an MCom in Business Management, he moved into General Management at Pioneer Foods in 1999 and later led the LSG Group in Sub-Saharan Africa before joining Halewood in 2014.



Jordi Borrut Bel – Managing Director, Heineken Beverages South Africa

Jordi has been the Managing Director of HEINEKEN Beverages South Africa since August 2021, following leadership roles as MD of Nigerian Breweries and GM of Brarudi S.A. in Burundi. With over 12 years at HEINEKEN across Spain, France, and Slovakia, he brings deep expertise in sales, brand management, and distribution.



Sola Oke – Managing Director: Africa, Pernod Ricard

Sola is the Managing Director of Pernod Ricard Africa, having joined the company in 2014 as Marketing Director in Nigeria. His leadership has driven strong growth across the continent, including an 81% sales increase in Nigeria, and he has previously led operations in South Central, Nigeria, and Western Africa.

Sean Teubes – CEO, The Really Great Brand Company (RGBC)

Sean is the CEO of The Really Great Brand Company (RGBC), having started his career in 1990 at Gilbeys and later joining Brown Forman Beverages Africa in 1997. Following the company's transition to RGBC in 2001, he rose through the ranks from General Manager to Sales Director, then MD, and ultimately CEO in 2021.



Market Integrity

**From Code to Confidence:
Building a Culture of
Self-Regulation**



Q2 saw the conclusion of the *Small Print, Big Impact* campaign — a national push to embed the Communications Code of Conduct (CCoC) across all DF-SA sectors and marketing channels. Through digital engagement, editorial exposure, and targeted outreach, the campaign reinforced self-regulation as a core pillar of industry credibility.

What's next:

- Continued awareness through DF-SA engagements with stakeholders
- Revision of the Code to update vehicle branding and influencers



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Research

From Insight to Impact: Cementing DF-SA's Scientific Leadership

A major highlight this quarter was the completion of the DF-SA-commissioned *Understanding the Illicit Alcohol Market in South Africa* study, conducted by Euromonitor International. The study provides a comprehensive overview of the size, drivers, and consequences of the illicit alcohol trade in South Africa, with critical insights into its impact on public health, tax revenue, industry sustainability, and consumer safety.



To disseminate the findings, DF-SA hosted two strategically important stakeholder events:

- A national webinar aimed at technical stakeholders and industry professionals, and
- A high-level panel discussion held at GIBS Business School in Johannesburg, attracting representatives from government, regulatory bodies, legal experts, civil society, and the media.

socio-economic challenges facing law enforcement and public health. A recurring theme during the discussion was the urgent need for a coordinated, multi-stakeholder response to the problem. In response, DF-SA was called upon to coordinate a collaborative framework involving government, industry, enforcement agencies, and civil society.

Both engagements were anchored by a detailed presentation from Benjamin Rideout, Lead Researcher at Euromonitor International, who unpacked the study's findings and responded to stakeholder questions.



The GIBS Panel Discussion was especially noteworthy, featuring:

- Mr Richard (Boris) Rivett-Carnac, Chairman of DF-SA
- Mr Hardin Ratshisusu, Acting Commissioner of the National Consumer Commission
- Mr Jan-Harm Swanepoel, Partner at Adams & Adams Attorneys
- Dr Shamal Ramesar, Head of Research at DF-SA

This cross-sectoral panel explored the broader implications of illicit alcohol on consumer rights, the regulatory landscape, and the



The GIBS event concluded with attendees signing a pledge of collective commitment to tackle the illicit alcohol crisis through joint awareness, accountability, and action. This symbolic gesture underscored a shared sense of urgency and mutual responsibility.

In terms of public impact, both events attracted widespread national media coverage, including television, radio, print, and digital features. This broad exposure helped raise national awareness around the scale and consequences of illicit alcohol and strengthened DF-SA's reputation as a thought leader on this critical issue.



Underage Drinking Study – Progress Update

Our ongoing commitment to understanding and preventing harmful drinking behaviours among youth also made significant progress in Q2 through the National Underage Drinking Study, led by research consultancy YDx.

The project has now reached its final stage, with all data collection and statistical analysis completed. The research team from DF-SA has conducted a preliminary internal review of the findings, which already point to valuable insights into the behavioural, cultural, and environmental drivers of underage drinking in South Africa.

A comprehensive final report is now in preparation.

“Research is at the heart of our stakeholder engagement, ensuring that decisions and solutions are data-led, targeted, and designed for the benefit of all South Africans.”

— Dr Shamal Ramesar, Head of Research, DF-SA





Policy & Regulatory Engagement

From Dialogue to Impact: Advancing Strategic Partnerships to Tackle Challenges and Champion a Responsible Drinks Industry



The sessions with liquor boards in the Free State, Gauteng, KwaZulu-Natal, and the Eastern Cape were instrumental in establishing cooperative mechanisms for monitoring compliance, improving enforcement, and bolstering regulatory integrity. Thus far, DF-SA has successfully positioned itself as a proactive and constructive voice within the alcohol industry, supporting responsible practices and effective collaboration with stakeholders.

In Q2, we focused our stakeholder engagements on deepening strategic relationships with key national government actors to address pressing challenges in the alcohol industry, the urgent need to combat illicit trade in alcoholic beverages, and the continuous promotion of responsible trading practices.

At the national and provincial level, DF-SA engaged with government departments and regulatory bodies to localise our advocacy efforts and align strategies for addressing illicit trade. These discussions were geared towards securing formal platforms for DF-SA to present recent research findings and industry trends, and to highlight provincial authorities' shared responsibility in advancing harm reduction and promoting

responsible trade. The positive reception by our stakeholder engagements reflects a growing recognition of DF-SA's role as a constructive industry partner, committed to public interest outcomes and evidence-based policy formulation and advocacy.



Parallel to its government engagements, DF-SA also prioritised strengthening collaboration with regulatory bodies, particularly provincial liquor boards. These engagements centred on sharing insights from DF-SA's latest report on illicit trade and offering feedback on the implementation of its Responsible Trade Framework.

Moreover, our participation in sector-wide forums and workshops reflected a holistic approach to engagement, embracing dialogue even with critical stakeholders. Through our involvement in platforms hosted by SALBA, CGCSA, and the Southern African Alcohol Policy Forum, we strengthened our relationships with industry bodies and benefited from diverse perspectives — including those critical of industry influence. These forums enabled us to both defend the industry's credibility and build consensus around shared objectives such as curbing illicit trade. Collectively, these engagements signify DF-SA's maturing role as a responsible and responsive stakeholder in South Africa's evolving policy environment.



HEINEKEN Beverages: Brewing a Better World for Mandela Day

Also in July, HEINEKEN Beverages implemented a series of Mandela Month initiatives aligned with its Brew a Better World commitments, uplifting communities nationwide. Through its Tavern Community Heroes project, tavern owners from the Tavern of the Future programme nominated local NPOs — from food kitchens and clean-up teams to shelters and community safety groups — to receive a cash donation in recognition of their work.

The Be the Legacy Stargivers employee initiative saw staff nominate organisations they support, focusing on environmental, social, and responsible consumption projects. Partnering with Rise Against Hunger Africa, HEINEKEN Beverages packed 50,000 meals for communities in need, and through Hope to the Homeless, worked alongside the South African Parliament and the Speaker of the National Assembly to feed homeless people in Cape Town.

“We brew the joy of true togetherness that will inspire a better world, and we will continue to honour Madiba’s legacy through action, compassion, and community.”

— HEINEKEN Beverages

SAB + SARU Celebrate 130 Years of Rugby Heritage

In a separate initiative, SAB marked 130 years of rugby partnership with the South African Rugby Union (SARU) — reflecting its long-standing investment in national identity, sports development, and unity.

To commemorate the milestone, SAB is rolling out a limited-edition beer can collection featuring iconic Springbok moments, alongside fan engagement content and retailer activations. The partnership also supports SAB’s commitment to responsible consumption during major sporting events, with targeted messaging aligned to the Championing Responsibility platform.

“Our legacy in sport is built on shared passion and responsible celebration.”





SAB + Overberg DSD Launch New GBV Centre in Caledon

On Mandela Day, South African Breweries (SAB), in partnership with the Overberg Department of Social Development (DSD), officially opened a new Gender-Based Violence (GBV) Centre in Caledon. The launch builds on SAB's GBV response strategy, developed in alignment with the national government's response plan.

The centre will serve as a community-based safe space and referral point, providing immediate support, counselling, and pathways to justice for GBV survivors. The initiative reflects SAB's commitment to addressing alcohol-related social harm through multi-sector collaboration and evidence-based community support.



"This is what it means to be purpose-led — responding to real needs, in real places, with long-term commitment."

— SAB External Relations Team



Member Call to Action

United Against Illicit Trade: An Industry-Wide Campaign



From June to October 2025, DF-SA and its member associations — including SAB, the Beer Association of South Africa, SA Wine, and HEINEKEN Beverages — are also coordinating a national awareness campaign focused on the scale and consequences of illicit alcohol trade.

The campaign highlights how illicit trade undermines legitimate businesses, reduces state revenue, exposes consumers to health risks, and fuels organised crime. It also aims to reinforce the economic contribution of compliant businesses and the urgent need for stronger enforcement and policy alignment.

As part of this united effort, **SA Wine** is running a dedicated campaign from June through to October to highlight the issue of illicit trade within the wine industry. This initiative aims to raise awareness of its scale and impact, and to inform both the public and stakeholders about the serious economic and social consequences it brings.

“Our goal is to illuminate the issue and encourage greater vigilance, responsibility, and support for legitimate trade practices.”

— SA Wine

To support member and stakeholder engagement, DF-SA has developed a Communications Toolkit including key messages, infographics, social media

content, and template articles.

HEINEKEN Beverages has also launched a targeted awareness campaign featuring a striking infographic and a short educational video. These resources highlight the risks and red flags of illicit alcohol — from poor-quality packaging and missing barcodes, and unusual taste, smell, or colour — and offer clear guidance on what to do and what not to do when suspicious products are encountered. By sharing these materials across industry and public channels, members can help South Africans **#SpotandStop** illicit alcohol, protecting both consumers and the legitimate economy.

DOWNLOAD the Illicit Trade Communications Toolkit

WATCH the HEINEKEN Illicit Trade Video

