



Western Cape
Government
FOR YOU

2024-25

Municipal Economic Review & Outlook

West Coast District

2024-25

Municipal Economic Review & Outlook

West Coast District



2024-25 MERO FOREWORD

The breathtaking and diverse regions of the Western Cape support a diversified economy, contributing to economic recovery and job creation. Over the course of the last year, the largely positive economic trajectory of the municipalities in the Western Cape has continued despite the numerous constraints that the Province currently faces, reflecting its adaptability to changing economic climates.

To address threats to the economy and capitalise on a myriad of opportunities within a budget-constrained environment, the Western Cape Government and municipalities may rely on the 2024-25 Municipal Economic Review and Outlook (MERO) for their upcoming planning cycle.

The MERO provides valuable insights, enriching our understanding of the region's multifaceted dynamics through the abundance of information contained in the report. This economic intelligence informs municipal integrated development plans, spatial development frameworks, local economic development strategies, and budgets. It also supports evidence-based decision-making and the implementation of the Joint District and Metro approach to foster province-wide socio-economic development.

To provide stakeholders with enhanced access to socio-economic intelligence, the MERO continually integrates the latest available data. This year's MERO innovations include an analysis of financial sustainability as a key enabler for infrastructure development, environmental risk and vulnerability data to begin tracking climate change concerns, insights from housing market and growth potential studies, and an expanded safety and well-being section. The latter includes health and education infrastructure analyses and regional insights into the prevalence of GBV.

We trust that all users will find this publication relevant and that it will provide a fresh perspective for planning and policy development. We would especially like to thank all departments, agencies, municipalities, and the research and development team for their contributions to this cutting-edge publication.



Provincial Treasury, Local Government
Budget Office, Private Bag X9165



15 Wale Street, Cape Town



+27 21 483 5618



www.westerncape.gov.za

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Adv. Deidré Baartman
Minister of Finance

26 November 2024

ACRONYMS AND ABBREVIATIONS

ASFR	Age-Specific Fertility Rate
BFAP	Bureau for Food and Agricultural Policy
BPO	Business Process Outsourcing
CBD	Central Business District
CKD	Central Karoo District
COVID-19	Coronavirus
CPI	Consumer Price Index
CSIR	Council for Scientific and Industrial Research
CTICC	Cape Town International Convention Centre
CWD	Cape Winelands District
DOL	Department of Labour
DRIM	Directorate Research and Information Management
DSD	Department of Social Development
EME	Exempted Micro Enterprise
EU	European Union
FET	Further Education and Training
FLISP	Finance Linked Individual Subsidy
FPL	Food Poverty Line
FTE	Full-Time Equivalent
GBV	Gender-Based Violence
GDP	Gross Domestic Product
GDPR	Gross Domestic Product Per Region
GFCF	Gross Fixed Capital Formation
GRD	Garden Route District
GWh	Gigawatt Hour
HDI	Human Development Index
HSRC	Human Sciences Research Council
HUG	Help Us Grow
IDP	Integrated Development Plan
IDZ	Industrial Development Zone
IRDP	Integrated Residential Development Programme
IRM	Infrastructure Reporting Model
IT	Information Technology
LGSETA	Local Government Sector Education and Training Authority
MERO	Municipal Economic Review and Outlook
MFSI	Municipal Financial Sustainability Index
MICE	Meetings, Incentives, Conferences and Exhibitions
MOD	Mass participation; Opportunity and access; Development and growth (MOD) Programme
MTEF	Medium Term Expenditure Framework

MTRF	Medium Term Revenue and Expenditure Framework
MW	Megawatt
MYPE	Mid-Year Population Estimate
NASA	National Aeronautics and Space Administration
NDP	National Development Plan
NGO	Non-governmental Organisation
NPO	Non-profit Organisation
NSC	National Senior Certificate
OD	Overberg District
OPMII	Overview of Provincial and Municipal Infrastructure & Investment
PERO	Provincial Economic Review and Outlook
PFA	Priority Focus Area
PPFR	Preferential Procurement Policy Framework Regulations
PPU	Provincial Population Unit
PYEI	Presidential Youth Employment Initiative
QR	Quick Response
QSE	Qualifying Small Enterprise
RDP	Reconstruction and Development Programme
SA	South Africa
SAB	South African Breweries
SANSA	South African National Space Agency
SAPS	South African Police Service
SARB	South African Reserve Bank
SARS	South African Revenue Service
SASSA	South African Social Security Agency
SMME	Small, Medium and Micro Enterprise
SSEG	Small-Scale Embedded Generation
TVET	Technical Vocational Education and Training
UISP	Upgrading of Informal Settlements Programme
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
VAT	Value Added Tax
WCD	West Coast District
WCED	Western Cape Education Department
WCSEB	Western Cape Supplier Evidence Bank
WHO	World Health Organization
WWF	World Wide Fund For Nature
YES	Youth Employment Service

2024-25

Municipal Economic Review & Outlook

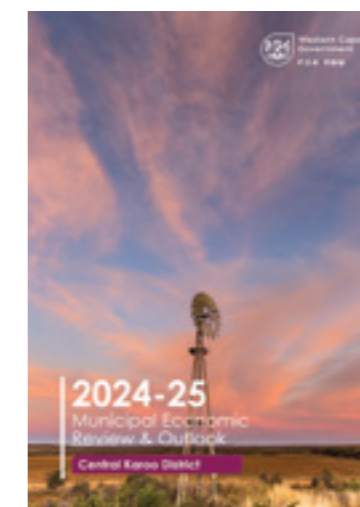
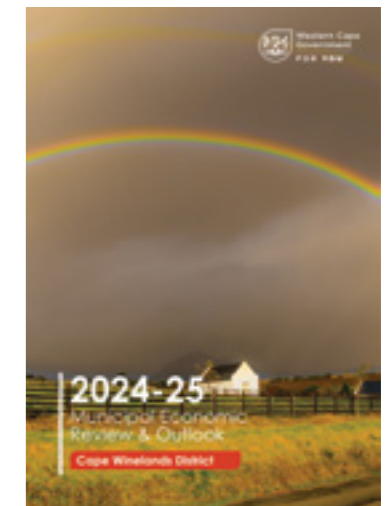
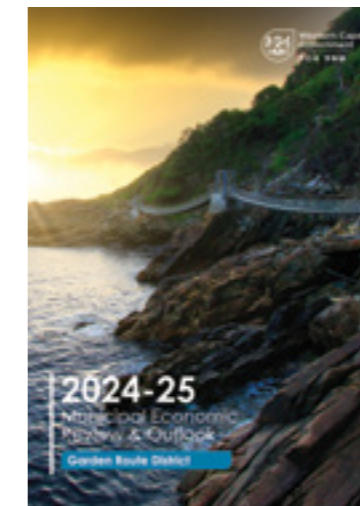
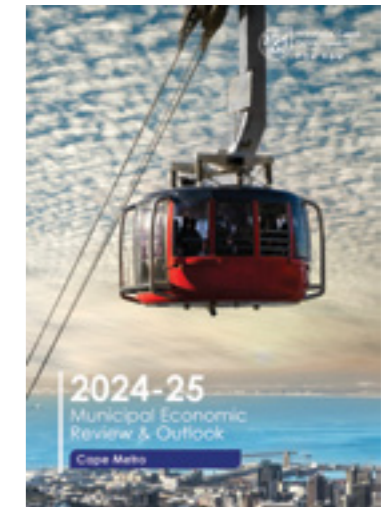
West Coast District



2024-25 Municipal Economic Review & Outlook

West Coast District

2024-25 MERO BOOKLETS



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INTRODUCTION & BACKGROUND

INTRODUCTION

The Western Cape is a diverse region, encompassing the vibrant Cape Metro, internationally renowned as one of the world's premier destinations, as well as the expansive vistas of the Karoo. The fynbos-clad peaks of the Overberg and the alluring coastlines of the Garden Route attract both domestic and international travellers. Agriculture is a defining feature of the Province, stretching from the wheat fields along the Olifants River on the West Coast to the vineyards of the Cape Winelands and the apple and pear orchards of the Overberg. Against this backdrop, local government seeks to foster an environment that propels communities and enterprises toward prosperity.

Through evidence-based decision-making, opportunities for growth and development can be unlocked. The Municipal Economic Review and Outlook (MERO) employs a variety of data sources to provide a detailed analysis of socio-economic trends in the municipal areas of the Western Cape. This analysis aims to inform policy, planning, and budget allocation at the local government level.

The comprehensive economic review presented in the MERO is disaggregated at the metro, district, and municipal levels. Economic, employment and trade data are sourced from Statistics South Africa (Stats SA) and is aggregated by Quantec, a South African econometric and statistical analysis consultancy. SARS' Spatial Tax Panel data further provides detailed insights into the formal sector's employment trends, at the municipal level. The most recent available statistics are used to ensure an accurate assessment of trends, with regional GDPR data covering 2013 to 2023, and forecasting for 2024 to 2026.

Data for various socio-economic indicators are sourced from provincial departments, including Treasury, Health and Wellness, Education, Infrastructure, Social Development, and Local Government. Tourism data is sourced from Wesgro and S&P Global: Market Intelligence, while crime data is obtained from the South African Police Service (SAPS). Inequality data is also obtained from S&P Global. District and local municipalities have provided additional insights into recent local developments through the annual Municipal Perception Survey.

DATA DISCLAIMER.

The South African Revenue Service (SARS) Spatial Tax Panel data only accounts for the activities of individuals and firms in the formal sector (registered for tax purposes), and the spatial component is based on postal codes, but is only available at a municipal level in 2023. The data excludes information concerning the informal sector and non-tax registered firms. Furthermore, the data excludes individuals earning less than R2 000 per annum.

MYPE 2024 v Census 2022

The 2024 Mid-Year Population Estimates (MYPE) serve as the basis for South Africa's latest population count and will be used for budgeting and planning purposes, particularly in relation to the Equitable Share Formula. However, there are significant inconsistencies between the 2024 MYPE and the previously used Census 2022 data, both at an aggregate level and by gender. To address these discrepancies, there have been calls to integrate the Census 2022 data into the 2024 MYPE data.

REPORT OUTLINE

The 2024/25 Municipal Economic Review and Outlook (MERO) is structured as follows:

SECTION A: MACROECONOMIC PERFORMANCE AND OUTLOOK

The economic landscape of the Western Cape and South Africa is shaped by a complex interplay of global and local factors. The post-pandemic era has brought heightened volatility, geopolitical tensions, high lending and inflation rates, and subdued economic activity. Despite these challenges, there are signs of cautious optimism, driven by easing global oil prices, improved trade outlooks, and economic stimuli from major economies like the United States (US) and China.

SECTION B: ECONOMIC GROWTH AND JOBS

With rapid population growth in the Western Cape, promoting economic growth and job creation is crucial. This section addresses:

- **GDPR and Employment:** analyses the economy's performance and provides an economic outlook for 2024 to 2026. It reviews full-time employment at the municipal level and disaggregated sector level, providing insights into economic intricacies.
- **International Trade:** examines historical trade trends, leading products imported and exported, and identifies key trading partners. It analyses current and potential challenges to increasing exports and highlights opportunities for trade.
- **Tourism:** reviews trends for 2023, identifying key markets and opportunities. The Western Cape's unique landscapes and diverse activities attract domestic and international tourists, transforming economic prospects and employment opportunities.
- **Investment:** reviews public sector infrastructure budgets and spending on contractors in 2024/25 and designated groups. It also analyses private sector sentiments through building plans and gross fixed capital formation (GFCF) trends.

SECTION C: SAFETY AND WELLBEING

This section explores social trends shaping the District's identity. It reviews population dynamics, income, housing needs, and essential services, providing a detailed illustration of socio-economic dynamics and social disparities. It includes an examination of healthcare, education, and crime metrics, offering a comprehensive view of community wellbeing and prospects, highlighting the interplay of social and economic factors in the District.



The MERO serves as a complement to the Provincial Economic Review and Outlook (PERO), which delivers economic insights at the provincial level, and the Socio-Economic Profiles, which provide detailed socio-economic data at the municipal level. These resources, including the MERO, are accessible via the QR code.

Gross Domestic Product



GDP: R608.7 bil

West Coast
GDP: R29.4 bil
492 261 people

Export: R202 bil



Trade

Import: R329 bil

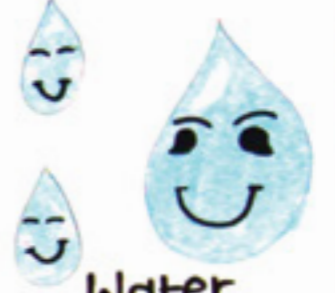


Travel
↑ 13.3% (2022)

Overberg
GDP: R20.8 bil
326 974 people



Commissioner for Children



Water 84.5% of households
Sanitation 91.6% of households



Electricity 96.4% of households



Households 2.3 million

Wanna know what's happening in Western Cape?

(2022-2024 info)

Garden Route
GDP: R46.7 bil
674 960 people



GDP: R68.2 bil
1 million people



cape Winelands

Cape Metro
GDP: R441 bil
5 million people



Employment 2.6 million



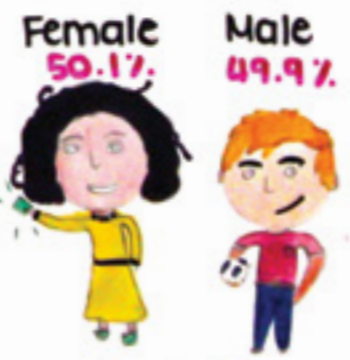
Central Karoo
GDP: R2.9 bil
71 883 people



21.7% Unemployment



Population 7.563 million



Female 50.1% Male 49.9%

Gender



SECTION

A

Macroeconomic
performance and
outlook

GLOBAL ECONOMIC CONTEXT

The post-pandemic era has been characterised by volatile economic conditions, heightened geopolitical tensions and uncertainty. Individuals, businesses and governments are navigating (i) a protracted period of exceedingly high lending and inflation rates, (ii) subdued economic activity, (iii) exposure to high sovereign debt and debt service costs, and (iv) major geopolitical changes across the globe. Conflicts across parts of Africa, Europe and the Middle East have exacerbated these already-trying conditions.

Notwithstanding these events, the global economy is seeing some of its first green shoots that signal a potential uptick in the global economic outlook:

- **The United States (US) has begun easing interest rates, with major central banks around the world expected to follow suit.** In addition, the recent USA elections in November 2024 ushering the Republican Party and Donald Trump into power are likely to have significant consequences for the South African (SA) economy. Potential impacts include volatility in exchange rates, changes in trade and investment flows, fluctuations in global commodity prices, shifts in global risk appetite, adjustments in interest rates, and possible alterations to United States foreign policy that could affect SA's geopolitical standing and international relations.
- **China's economic performance at the beginning of 2024 was stronger than initially anticipated by market participants.** Going forward, the country's improved economic prospects will be driven by a large economic stimulus announced in September 2024. This stimulus has bolstered growth expectations and provided a positive outlook for global trade and investment flows.
- **The easing of global oil prices** will benefit most of the world's economies through immediate cost reductions. Lower prices contribute to production expansions and ease inflationary pressures, providing a boost to economic activity and consumer spending. This trend supports overall economic stability and growth prospects.
- **Improved trade outlooks** relative to those originally anticipated at the start of the year have emerged across several exporting countries. This positive shift is driven by easing supply chain disruptions post-COVID-19, renewed demand for commodities, and enhanced trade agreements. These factors are fostering a more favourable environment for international trade and economic cooperation.
- **Increased trade volumes are expected as economies stabilise, and exporters can gain greater access to international markets.** For South Africa, this could bolster export performance in mining, agriculture and some manufacturing sectors (iron and steel, and automotive industries). This will enhance foreign exchange earnings and support overall economic growth, underscoring the importance of trade relationships and South Africa's ability to leverage global market opportunities.
- **These developments offer grounds for a measured economic optimism in the second half of 2024.** This contrasts with the pessimism that marked the year's outset. Despite the ongoing challenges, such as conflict in the Middle East and Ukraine, the evidence increasingly suggests that the global economy is relatively resilient and capable of navigating these obstacles. This shift in perspective underscores a cautious yet growing confidence in our collective resilience and adaptability.

DEVELOPMENTS IN THE SOUTH AFRICAN ECONOMY

Much like the global outlook, the South African socio-economic outlook has improved since the start of the year. In June of 2024, no political party secured a majority of votes to govern outright, and a coalition was formed, the Government of National Unity (GNU). The GNU signals a new era of political cooperation alongside public and economic policy coordination, which have allowed a cautiously optimistic outlook for one of Africa's most industrialised economies.

This optimism, coupled with an enabling global economy, have affected key economic indicators:

- **The Rand has appreciated against major currencies thanks to international and domestic factors.** For instance, the Rand has firmed considerably against the United States dollar: from R18.96/\$ in the first week of June 2024, to R17.60/\$ by mid-October 2024. In turn, a firmer Rand, has eased inflationary pressures and made imports relatively cheaper, though exports might lose some price competitiveness.
- **The South African Reserve Bank (SARB) has reduced interest rates, signalling the potential for further decreases.** With a more subdued inflation print, the Monetary Policy Committee (MPC) decided to lower the repurchase rate by 25 basis points during their September 2024 meeting. It is expected that the rate will be cut by at least 100 basis points by the end of December 2025. Lower interest rates are likely to make borrowing more affordable, thereby stimulating consumer spending and investment.
- **South Africa recorded a modest increase in GDP. GDP grew by 0.4 per cent in 2024Q2 up from a decline in GDP of 0.1 per cent in 2024Q1.** Forecasts pit GDP growth at just shy of 1 per cent by the end of 2024, and between the 1.5 and 2 per cent mark for 2025.
- **A significant reduction in load shedding has eased pressures on economic activity.** Whilst the current end to loadshedding is no guarantee of future performance by Eskom, the confidence instilled by Eskom's recent performance has boosted certainty on the power outlook in SA.
- Despite these gains, there are still risks to the outlook which have the potential to erode or reverse the expected economic headwinds. Most notably:
- **The labour market continues to face constraints as the unemployment rate rose from 32.9 per cent 2024Q1 to 33.5 per cent by the end of 2024Q2.** Despite the moderate economic growth, the economy shed ~100 000 jobs¹.
- **South Africa is set to become one of the countries with the highest electricity costs, should the National Energy Regulator of South Africa (NERSA) approve Eskom's proposed 30 per cent hike.** This substantial hike could significantly raise operating expenses, negatively impacting business operations and reducing disposable income for consumers.
- **While fiscal consolidation efforts persist, government debt still hovers at an untenable level.** Almost 20 cents from every R1 collected by the government goes back into servicing its debt, crowding out expenditures sorely needed by the economy.
- **South Africa is vulnerable to changes in global economic conditions due to several factors.** Geopolitical factors such as the outcome of the United States elections and the ongoing conflicts across parts of the Middle East and Europe have a direct impact on South Africa's economy given South Africa's trade and investment ties with the involved countries. Furthermore, local monetary policy is heavily influenced by global interest rate conditions and the positions taken by central banks in the United States, UK and EU. Together these external factors can affect the valuation of the Rand and influence investor confidence.

¹ Statssa, 2024

- **SA faces significant climate change risks that threaten agriculture, infrastructure, and economic stability.** Severe weather events, like heatwaves and flooding, are projected to cause major damage by 2050. Heatwaves could cost R2 billion in agricultural losses, while flooding may result in R14 billion in damages.² To mitigate these impacts, adopting low-carbon policies is essential; limiting temperature rise to 2°C could reduce climate-related economic losses from 5 per cent to 3.3 per cent of GDP. Given South Africa's biodiversity, sustainable growth is vital for long-term prosperity.³

DEVELOPMENTS IN THE WESTERN CAPE ECONOMY

In 2023, the Western Cape's economy expanded by 0.6 per cent, with forecasts suggesting real economic growth of closer to 1 per cent by 2024.⁴ Sectors such as tourism, renewable energy, and business process outsourcing offer further growth opportunities.

Growth was enabled by:

- **Slight improvement in the most recent RMB/BER Business Confidence Index (BCI).** The BCI is still below the neutral mark of 50, but up from 31 in Q2 of 2023 to 40 in Q1 of 2024.⁵ This indicates improvements in the operating environment within the country in the wake of the GNU, and subsequent local and global economic conditions.⁶
- **A robust small, micro and medium-sized enterprises (SMMEs) environment.** The Small Enterprise Development Agency (Seda) reports that the Western Cape ranks as the third major contributor to hosting SMMEs in the country (with 11.6 per cent of such businesses, or some 300 000 SMMEs being Western Cape based). The Western Cape is third to the Gauteng Province (accounts for 37.5 per cent) and Kwazulu-Natal at 14.1 per cent.
- **Total exports reached R202.1 billion in 2023, marking remarkable year-on-year growth of 8.7 per cent.** The presence of an oil refinery in Cape Town and the country's only gas-to-liquid (GTL) refinery in Mossel Bay support the province's relatively high share of exports of mineral fuels and mineral oils. The export of fresh fruit, textiles and clothing, along with other agriculture products also contribute significantly to export earnings.
- **Wesgro committed to 14 investment projects, totalling R7.8 billion in value in 2023/24.** These projects led to the creation of 3 913 jobs, surpassing the investment target. Additionally, 157 trade declarations were signed, amounting to R6.8 billion in value and resulting in 4 948 new jobs. These outcomes reflect an increase in exports and the rand value of investments.
- **The tourism industry experienced a robust rebound during the 2023/24 period.** International arrivals at Cape Town International Airport surpassed 200 000 between January and February 2024, increasing by 20 per cent compared to the previous year.
- **Relatively low unemployment levels, with the Western Cape recording the lowest unemployment rate in 2023.** The most recent Quarterly Labour Force Survey (QLFS) indicated that, although the Western Cape's unemployment rate rose between Q1 and Q2 of 2024 from 21.4 per cent to 22.2 per cent, this number is still well below the South African average unemployment rate (33.5 per cent).

Although the Western Cape shows promising potential for trade, tourism, renewable energy, and infrastructure investment, it is important to consider risks to the outlook. The provincial concerns over the construction mafia, and the national concerns over energy security and a general lack of business confidence could potentially hinder growth in the Western Cape.

² G20 Climate Risk Atlas, 2024
³ Johnston, et al., 2024
⁴ G20 Climate Risk Atlas, 2024
⁵ Johnston, et al., 2024
⁶ Johnston, et al., 2024

POTENTIAL ECONOMIC SUCCESS IN THE BALANCE FOR SOUTH AFRICA AND DEPENDS ON THE GOVERNMENT OF NATIONAL UNITY

South Africa currently stands at a crossroads – the warm afterglow of the GNU is not expected to last forever. Resultantly, there is a need for true structural change in the short-to medium-term as a signal for political stability. As it stands, the GNU has three major goals:



Drive inclusive growth and job creation



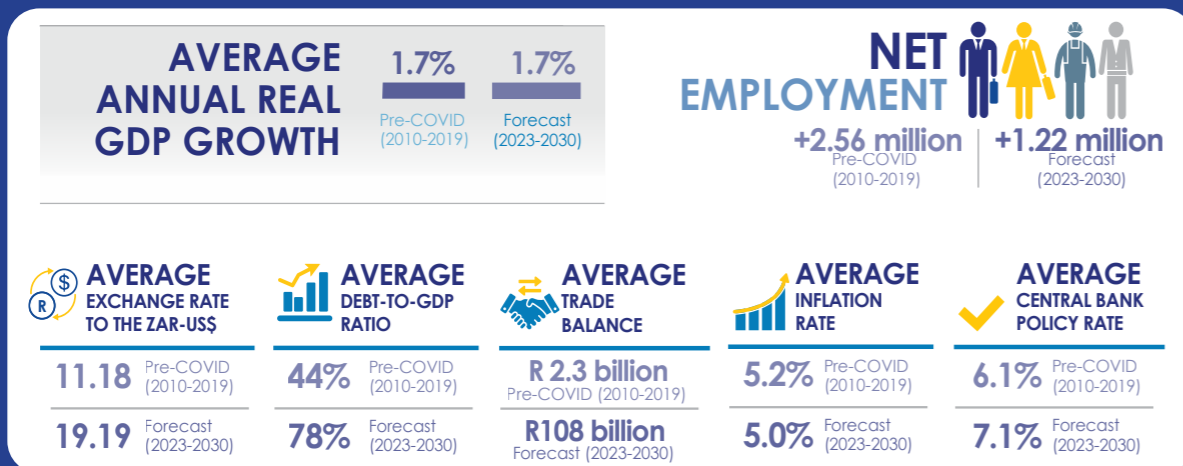
Build a capable, ethical and developmental state



Reduce poverty and tackle the high cost of living

Achieving South Africa's socio-economic objectives requires concerted and coordinated efforts from the GNU. While certain indicators, such as GDP, trade balance, and average inflation rates, show stability or improvement compared to pre-pandemic levels, other aspects, particularly those which concern net job creation, indicate potential declines.

Figure 1
INDICATORS OF SOUTH AFRICA'S ECONOMIC PROGRESS PRE- AND POST-PANDEMIC



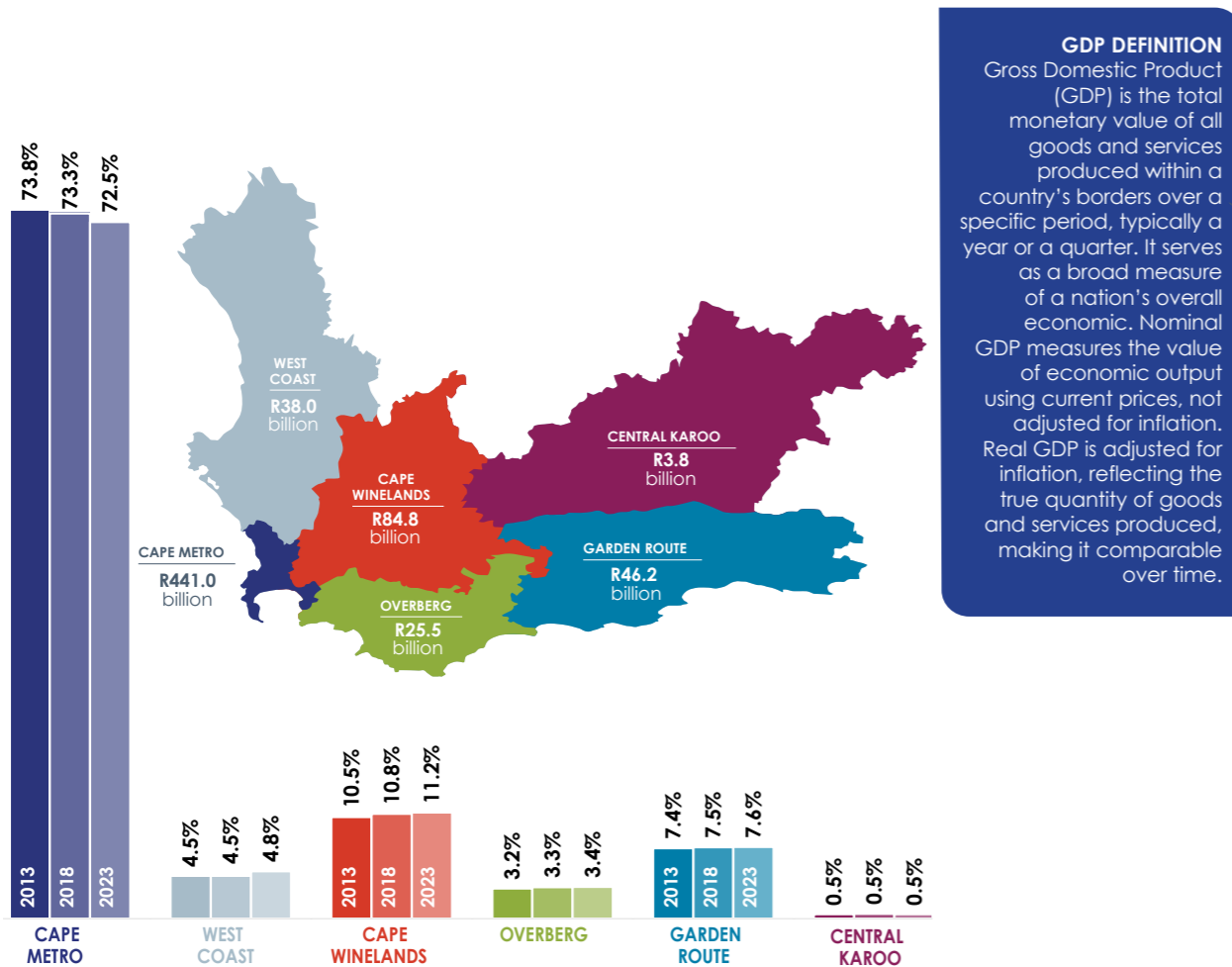
However, as the saying suggests, "The future is the past modified by the present."

Consequently, these forecasts are not set in stone; they are informed predictions based on historical patterns, assuming no significant deviations from established trends. It falls upon the GNU and the people of South Africa to drive the necessary structural changes that could steer these forecasts towards more favorable outcomes.

REGIONAL GDP PERFORMANCE

The Western Cape Province's economic activity is concentrated in the City of Cape Town metropolitan municipality (Cape Metro), which contributes over 70 per cent towards the provincial GDP. Over the last decade, the spread of economic activity has remained largely unchanged, although a slight increase, particularly in the contributions by the Cape Winelands and West Coast Districts (CWD) is noted. This economic structure is, in part, explained by historical development patterns which favoured the Metro and created a path dependency.⁷

Figure 2
REGIONAL CONTRIBUTORS TO PROVINCIAL GDP (REAL) 2013 – 2023



Source: Quantec, 2024

⁷ Path dependency refers to a situation where historical events and choices can have a persistent influence on the current and future economic outcomes. Path dependence emphasizes the importance of historical context and the idea that once a particular path is taken, it can become difficult to reverse or change course due to increasing returns, institutional lock-in, or other reinforcing mechanisms. See Anteonelli, C. (1997).

District economic contributions have remained relatively stable, with minor shifts across the regions. The Cape Metro continues to dominate, maintaining around 72-73 per cent of the provincial GDP share. CWD has seen the most notable increase, driven by its expanding tourism sector. The West Coast District (WCD), Overberg District (OD) and Garden Route District have also experienced some growth, though the WCD showed a more pronounced increase. The Central Karoo District (CKD), has seen minimal changes in its contributions. These trends call attention to the economic potential of smaller districts to develop and build a more resilient and diversified provincial economy.



0.7%
Regional economic growth

72.5%
Cape Metro Region contribution towards provincial GDP

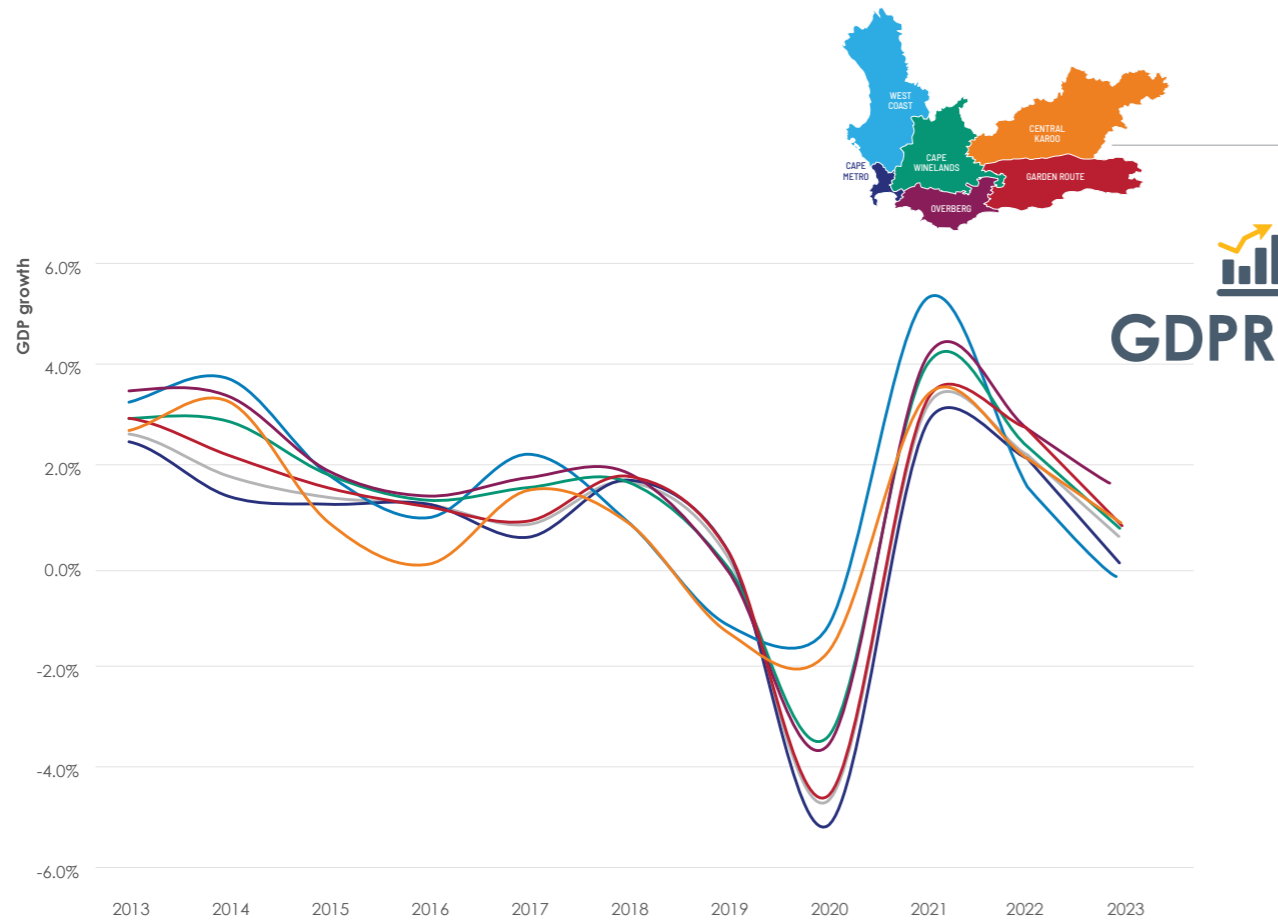
33.9%
Finance, insurance, real estate and business services contribution to regional GDP

1.0%
GDP forecasts for 2025 and 2026

4.8%
Regional employment growth rate

The Western Cape's economic growth has slowed, reaching a low of 0.7 per cent in 2023, despite a strong recovery in 2021 with a growth rate of 4.1 per cent. The robust post-2020 growth can be attributed to the economic rebound from the unprecedented disruptions caused by the pandemic. Conversely, the slowdown in the GDP growth rate reflects a return to historical growth trends, compounded by the adverse effects of climate change, the weakening of the Rand, and a challenging investment climate. Notably, the GDP of the Western Cape has exceeded the 2019 levels (R604.2 billion), reaching R613.8 billion in 2023. Similarly, all districts within the Western Cape have surpassed their 2019 GDP levels.

Figure 3
REGIONAL REAL GDP GROWTH RATES, 2013-2023

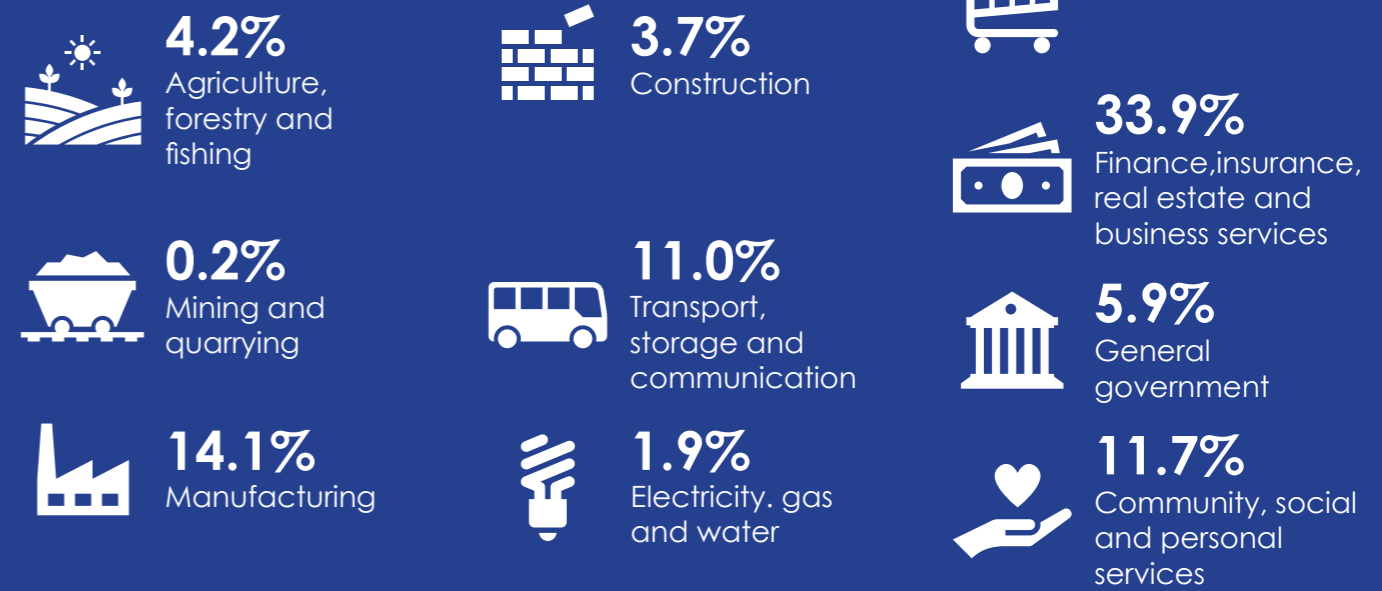


Source: Quantec, 2024

GDP growth (% change, y/y)	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Western Cape	2.7%	1.9%	1.4%	1.2%	0.9%	2.0%	0.3%	-5.5%	4.1%	2.6%	0.7%
Cape Metro	2.7%	1.9%	1.4%	1.2%	0.7%	1.8%	0.4%	-5.5%	2.9%	2.2%	2.3%
West Coast	3.4%	3.8%	1.4%	0.8%	2.2%	1.4%	-0.9%	-1.2%	4.5%	3.7%	-0.1%
Cape Winelands	3.1%	3.1%	1.7%	1.4%	1.7%	2.3%	0.2%	-3.8%	4.8%	3.1%	0.7%
Overberg	3.6%	3.5%	1.8%	1.4%	1.8%	2.4%	0.2%	-4.0%	4.9%	3.5%	1.3%
Garden Route	3.1%	2.3%	1.6%	1.2%	1.0%	2.2%	0.5%	-5.3%	4.3%	2.9%	1.1%
Central Karoo	2.8%	3.1%	0.4%	-0.2%	1.3%	1.4%	-1.4%	-2.5%	3.4%	3.7%	0.3%

Source: Quantec, 2024

WESTERN CAPE SECTOR GDP CONTRIBUTION 2023 (%)



The regional GDP growth rates have been quite differentiated across the districts, indicating the need to diversify economic contribution from the districts. While the Cape Metro steers the performance of the Province, the OD and GRD have recorded above average growth rates. On the other hand, the CKD saw close to zero growth. Overall, the trend for 2023 points to a general slowdown in growth rates, with the WCD even facing a slight contraction.

The robust growth rates in the OD and GRD can be explained by the increased investments in infrastructure, revival of the tourism industry and the internationally competitive agriculture industries. Conversely, the economic contraction in the WCD is due to deteriorating and inadequate infrastructure, coupled with extreme weather conditions that have negatively impacted agricultural production, a sector that contributes nearly 20 per cent to the District's GDP.⁸

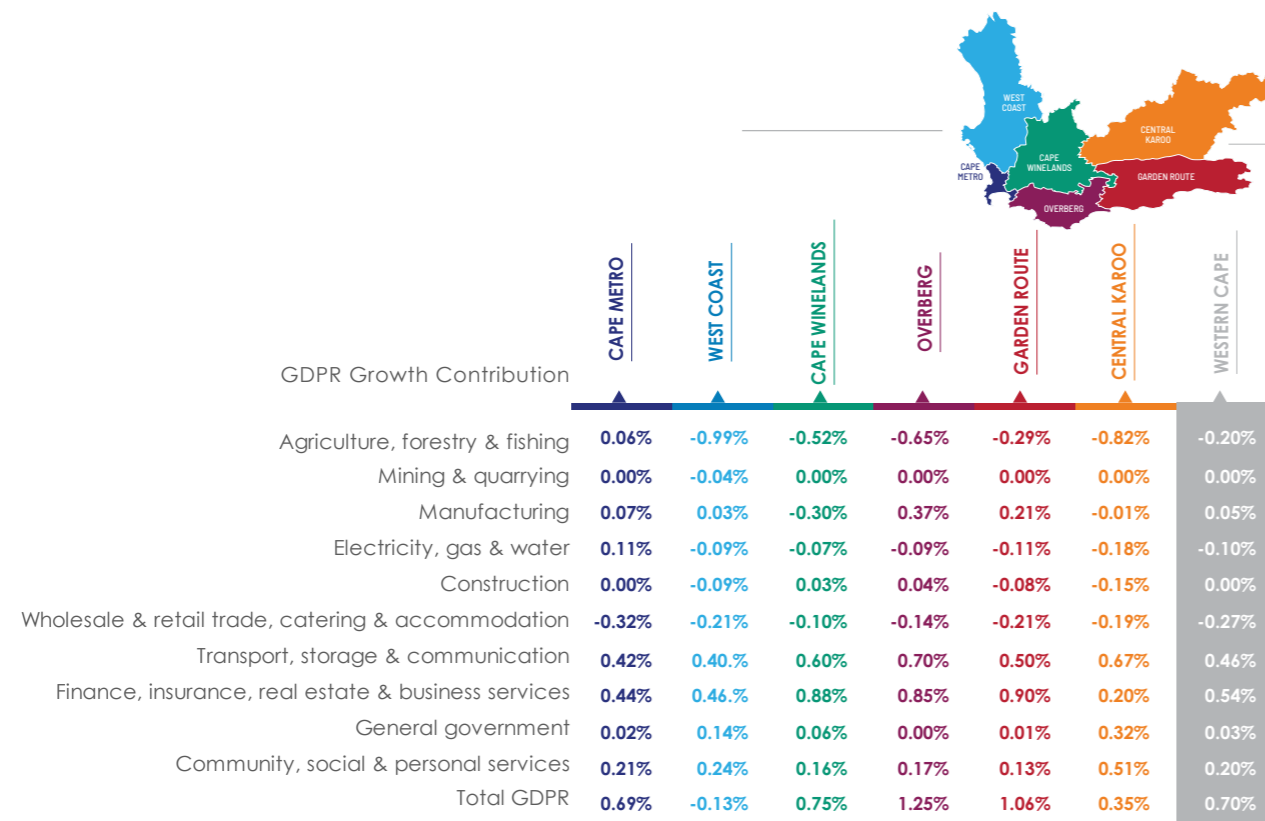


⁸ Insights based on the Municipal Perception Survey. International Journal of Industrial Organisation. 15 (6)..

The GDPR growth contributions across the Western Cape's sectors and regions show varied economic performance. The wholesale and retail trade, catering and accommodation, as well as agriculture, forestry, and fishing sectors experienced significant declines of -0.27 and -0.2 percentage points, respectively. The weak performance in agriculture was due to extreme weather conditions, while the wholesale and retail trade, catering and accommodation sector suffered from weakened consumer power. The electricity, gas, and water sector also recorded negative contributions to GDPR at -0.1 percentage points.

On the other hand, the finance, insurance, real estate, and business services sector was the top growth driver, especially in the GRD, CWD, and OD regions. Transport, storage, and communication, along with community, social, and personal services, contributed positively across the board, with OD, CKD, and CWD standing out. Manufacturing and construction sectors showed mixed contributions across the regions. The consistent yet modest contributions from the general government sector reflect its steady economic role.

Figure 4
REGIONAL SECTORAL CONTRIBUTIONS TO GDPR GROWTH, 2023 (%)

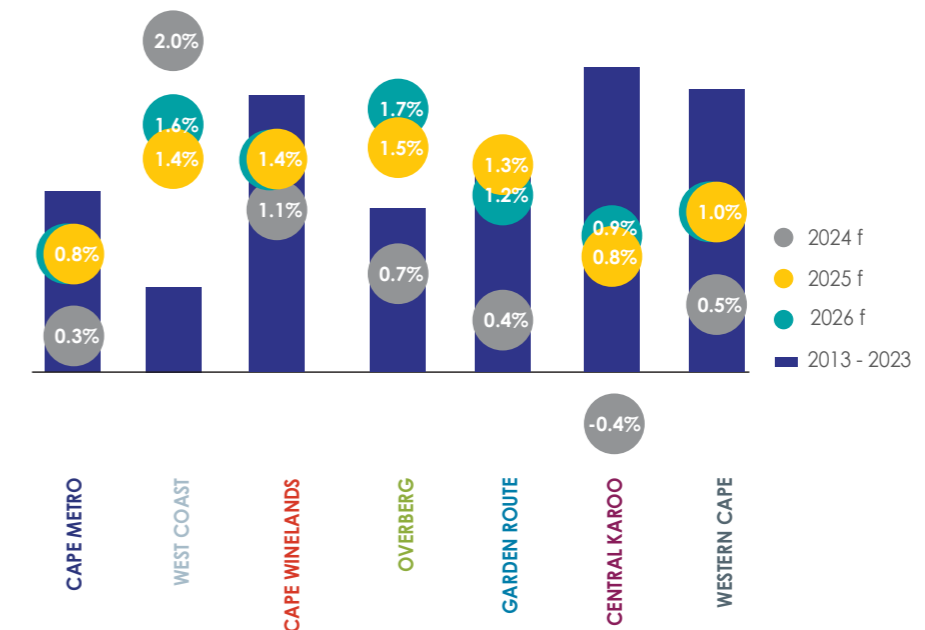


Source: Quantec, 2024

The Western Cape and its regions are anticipated to outperform the national growth forecast, with an expected growth rate of 0.5 per cent per annum in 2024. This outlook is fuelled by improved investor sentiment for the province, as evidenced by the above-average Business Confidence Index (BCI). Additionally, South Africa's G20 Presidency, starting on 1 December 2024, will bring unique benefits to the Western Cape through the hosting of large-scale meetings and a range of related events. Lastly, the tourism industry has recorded significant improvement since 2019, which has stimulated further demand for provincial goods and services.

The WCD is forecasted to record the weakest GDPR growth rates for 2025 and 2026 among the regions. This expected performance is partly due to base effects, where historical growth has been relatively strong, and forecasts have moderated. There are also structural challenges in the WCD that require intervention to boost long-term economic growth. This includes addressing issues related to rental costs, investing in climate-resilient infrastructure and slow water rights approvals that are stifling aquaculture expansion. These combined factors create a complex set of challenges that require a multi-faceted approach to address.⁹

Figure 5
REGIONAL GDPR FORECAST, 2024 – 2026



Source: Quantec, 2024 (f denotes forecast)

At a district level, the economic outlook reflects base effects (i.e., historical performance was relatively strong) but also highlights several regional challenges that moderate the growth outlook. In the short to medium term, economic growth is expected to match or surpass historical performance across many of the districts, with a few showing slightly lower levels of growth in the Western Cape. **The GDP forecasts for 2025 and 2026 are expected to be around 1 percent real GDP. This anticipated increase can be attributed to several key factors.**

⁹ Insights from the Municipality Perception Survey collected in October 2024.

In the Western Cape, infrastructure developments are driving growth across districts. In the Cape Metro, upgrades to the airport and N1 highway are boosting connectivity. The CWD benefits from expanded tourism infrastructure, while the GRD sees growth through eco-tourism and the George Airport expansion. The WCD, despite benefiting from renewable energy projects, is expected to experience slower growth by 2025 due to its reliance on traditional industries like fishing and agriculture, as well as infrastructure constraints such as limited transport, water management issues, and energy supply challenges. In the OD, investments in agricultural technology and water management ensure sustainability, while the CKD focuses on improving energy and water infrastructure for future growth. These developments are helping to improve business conditions and support the positive GDPR outlook across the Province.

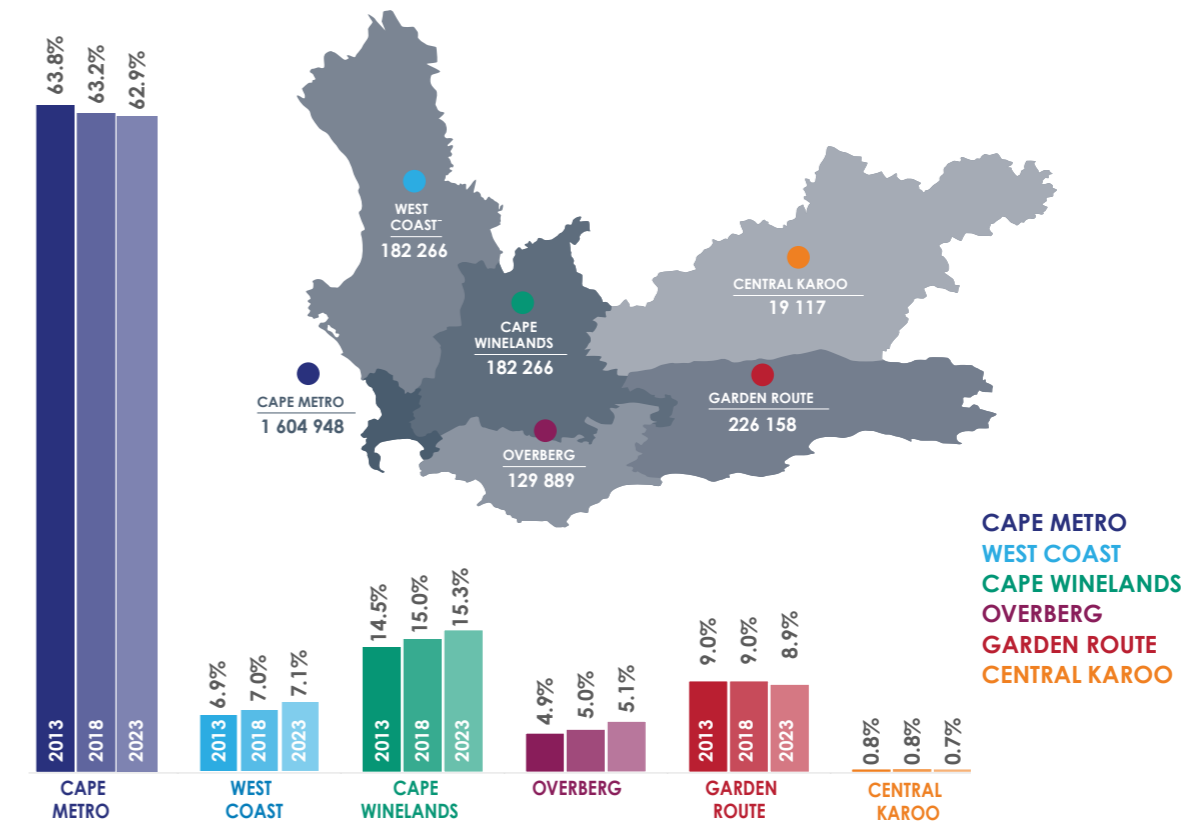
There is room to elevate the role of agriculture, forestry, and fishing within the provincial economy, as outlined in the Western Cape Government's Growth for Jobs Strategy. One opportunity lies in increasing the integration of high-value products, such as wine and fruit, across the OD, CWD, and WCD regions. These high-value sectors could strengthen their links with the broader provincial economy, creating more value and enhancing local economies. Additionally, while the Cape Metro remains a key commercial hub, greater collaboration and economic development across the Metro and neighbouring districts will be crucial for achieving a more unified and prosperous Western Cape. This balanced approach would help stimulate growth across all regions, ensuring that the benefits of economic expansion are felt beyond the Metro.

As highlighted above, economic growth in the Western Cape remains concentrated in the Cape Metro, with a smaller contribution from the other districts. The Cape Metro has developed a dynamic economy, where innovative startups and established corporations coexist, fostering a culture of entrepreneurship. This entrepreneurial spirit, coupled with a skilled workforce and a supportive business ecosystem, positions the Cape Metro as a key driver of growth in the Province. The region's infrastructure - particularly its airports, ports, and road networks - enhances connectivity, further driving growth by facilitating trade, tourism, and business operations. However, there is still room for improvement in rail transport and port performance, further enhance the region's connectivity and overall economic potential. Lastly, Cape Town's appeal as a destination for both tourists and businesses strengthens its economic vitality, creating a synergistic relationship between various sectors that propels ongoing development and job creation.¹⁰

REGIONAL EMPLOYMENT PERFORMANCE

Regional employment contributions from 2013 to 2023 generally align with the GDPR contributions across districts, as outlined earlier. The Cape Metro remains the largest contributor to employment, accounting for 62.9 per cent in 2023, followed by the CWD at 15.3 per cent and the GRD at 8.9 per cent. While the Cape Metro, GRD and CKD saw slight declines in their employment shares, there were modest increases in the CWD, OD, and WCD. The decline in the Cape Metro share reflects a broader trend of increased employment opportunities in other regions, driven by growth in sectors such as tourism, agriculture, and fishing.

Figure 6
REGIONAL SECTORAL CONTRIBUTIONS TO EMPLOYMENT, 2023 (%)



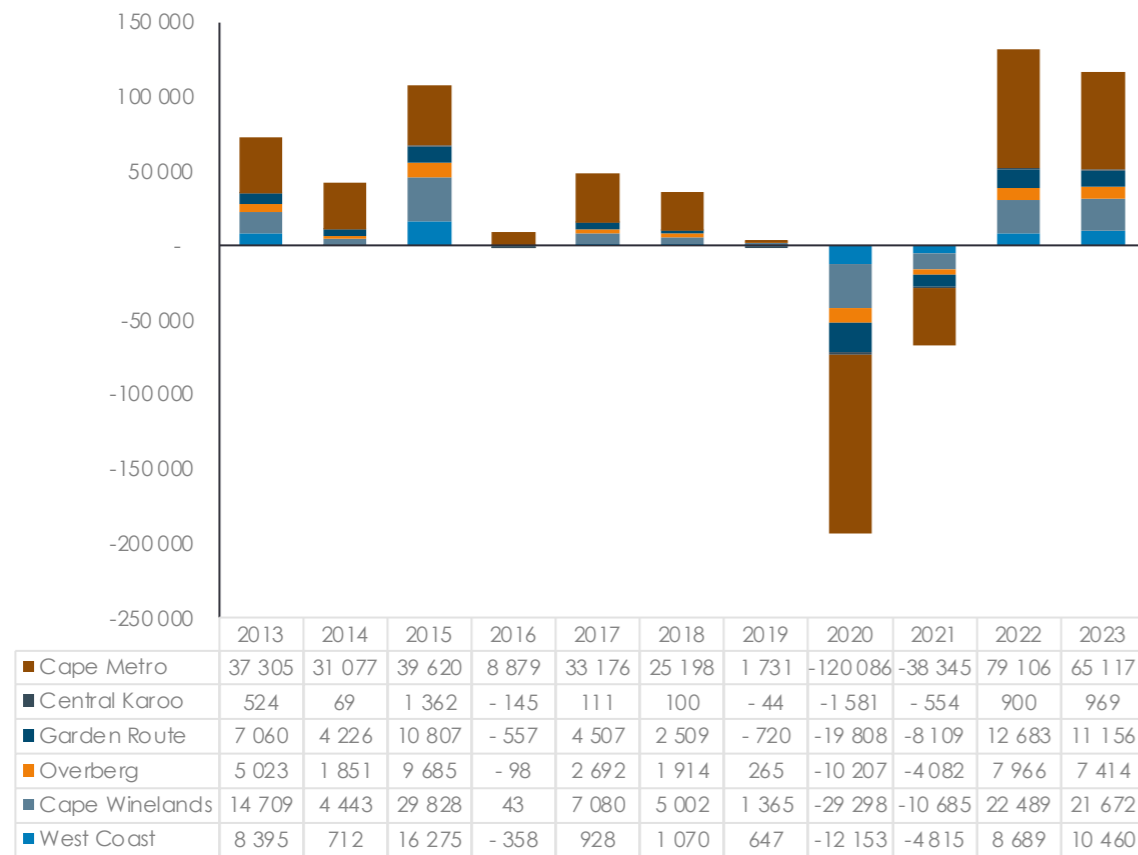
YEAR	2013	2018	2023
West Coast	160 811	179 438	182 266
Cape Winelands	337 744	384 140	389 683
Overberg	112 489	128 534	129 889
Garden Route	209 464	230 956	226 158
Central Karoo	17 930	19 427	19 117
Cape Metro	1 479 474	1 617 424	1 604 948

Source: Quantec, 2024

¹⁰ Insights from the Municipality Perception Survey collected in October 2024.

Western Cape's moderate GDP growth of 0.7 per cent in 2023 translated to a 4.8 per cent increase in jobs, or a net employment increase of 116 787. The largest percentage gains in jobs were recorded in WCD and OD of 6.1 per cent each, thanks to the successful farming seasons that were experienced in those regions. These were followed by moderate gains in CWD, CKD and GRD, with increases of 5.9 per cent, 5.3 per cent and 5.2 per cent respectively. The smallest job gains were recorded in the Cape Metro, reflecting a shift towards digitalisation and automation in the finance, insurance, real estate and business services sectors.

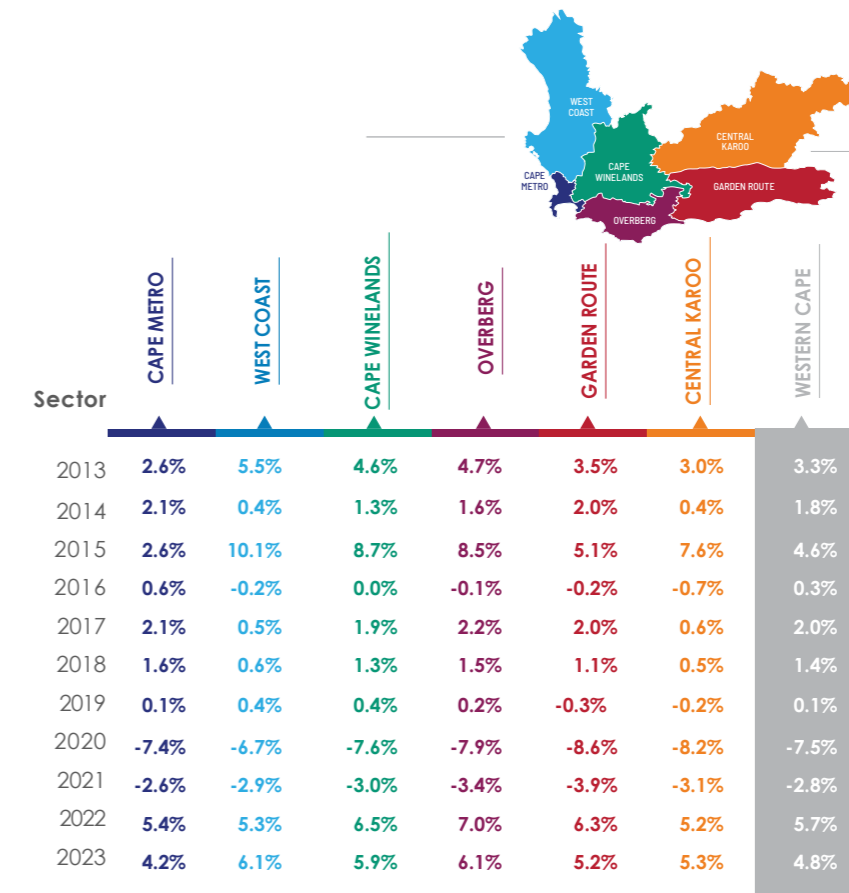
Figure 7
REGIONAL CONTRIBUTIONS TO PROVINCIAL EMPLOYMENT, 2013 – 2023



Source: Quantec, 2024

The Western Cape's employment growth generally outpaces GDP growth, with notable differences across districts. Cape Metro's slower employment growth reflects a shift towards capital-intensive sectors that require less labour. In contrast, employment in the OD, CWD, and WCD districts has outpaced economic growth, driven by labour-intensive sectors like agriculture and tourism. The CKD, however, shows more volatility, with employment growth influenced by environmental shocks and outmigration to urban centres. Despite these variations, employment trends highlight the strong role of agriculture and tourism in job creation outside of Cape Metro.

Figure 8
REGIONAL TOTAL EMPLOYMENT¹¹ GROWTH RATES, 2013 – 2023



Source: Quantec, 2024

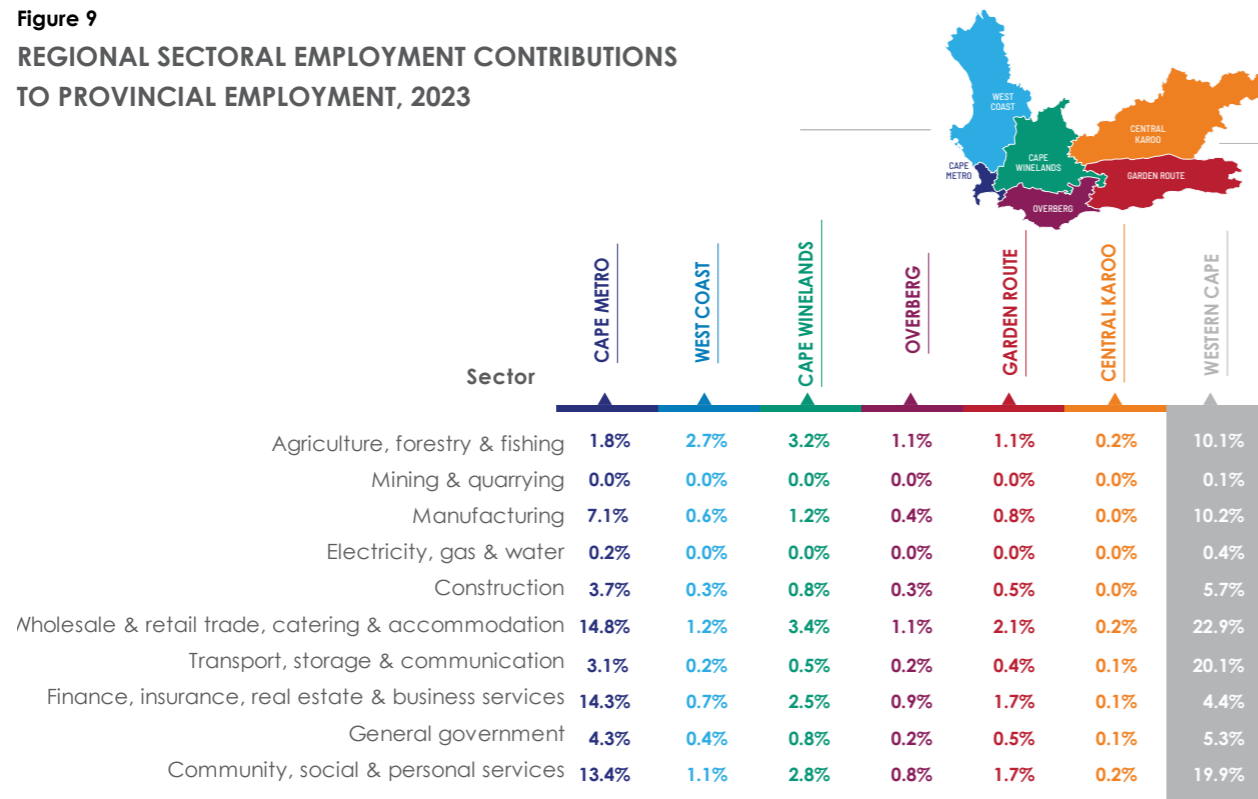
The labour intensity of the agriculture, forestry, and fishing, manufacturing, and community services sectors is evident at the sectoral level. The agriculture, forestry, and fishing sector contributes 10.1 per cent to provincial employment, compared to 4.1 per cent towards GDP which indicates its labour intensity. The employment contribution to the agriculture, forestry, and fishing sector is concentrated in the CWD (3.2 per cent) and WCD (2.7 per cent).

In comparison, the manufacturing sector contributes 10.2 per cent to employment but accounts for a GDP share of 14.1 per cent. This highlights the lower labour intensity and higher productivity of manufacturing relative to agriculture, despite its larger economic output. Other sectors, such as community services, also play a key role in employment, but their GDP contributions are more modest, reflecting the broader mix of industries driving the provincial employment. This distinction underscores the importance of labour-intensive sectors, particularly agriculture and manufacturing, in sustaining regional employment and supporting economic growth across various districts.

In contrast, the finance, insurance, real estate, and business services sector, despite being the top GDP contributor, offers a smaller share of employment. This suggests that the sector is less labour-intensive and more focused on capital intensive, high productivity functions. At the same time, the employment contributions from the transport, storage, and communication sector are relatively low compared to other sectors, indicating that while essential for economic function, it does not employ as many people proportionally.

¹¹ Includes formal and informal employment estimates.

Figure 9
REGIONAL SECTORAL EMPLOYMENT CONTRIBUTIONS TO PROVINCIAL EMPLOYMENT, 2023

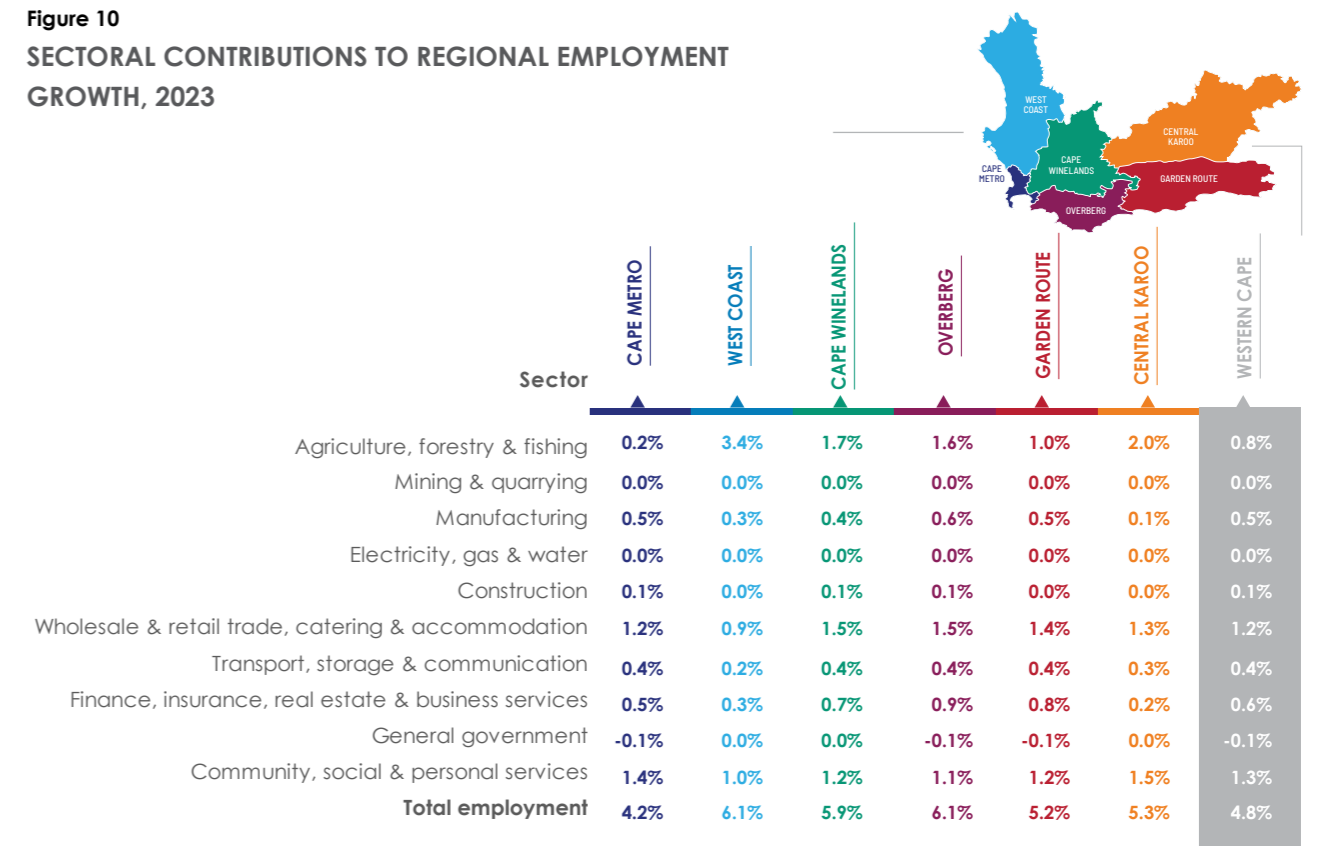


Source: Quantec, 2024

The employment growth contributions from the agriculture, wholesale and retail trade, and community services sectors are vital for job creation across the Province. The employment growth contributions from the agriculture, wholesale and retail trade, and community services sectors are vital for job creation across the Province. Agriculture, forestry, and fishing, in particular, show a significant employment growth contribution, especially in the WCD (3.4 per cent) and CWD (1.7 per cent). This growth is largely driven by key sub-sectors within agriculture, such as fruit and wine production, which are labour-intensive and continue to expand in response to both local and international demand. These sectors are essential to job creation in these regions, where they make up a substantial portion of the employment base. The continued strength of agriculture in these districts is indicative of its central role in supporting the local economy and sustaining employment growth.

Notably, the employment growth contribution of manufacturing is consistent across municipalities, with a notable contribution in the WCD (0.6 per cent). Additionally, the transport, storage, and communication sector's employment growth contribution are relatively low across all regions. While these sectors are not the major drivers of employment growth, they play a key role for structural transformation and industrialisation. Sectors like finance and transport show lower employment growth contributions relative to GDP.

Figure 10
SECTORAL CONTRIBUTIONS TO REGIONAL EMPLOYMENT GROWTH, 2023



Source: Quantec, 2024

Overall, while districts like the CWD and WCD exhibit robust contributions from the agriculture sector, the Cape Metro remains a hub for trade and services. Employment growth has predominantly been driven by the agriculture, forestry and fishing and wholesale and retail trade, catering and accommodation sectors in the Western Cape, particularly in areas with established viticulture economies in the CWD and diverse agricultural produce in the WCD and CKD. Regions such as the CKD require further diversification to enhance economic growth.

For the Western Cape Government, employment pathways and expectations are also guided by the strategic priorities of the provincial government. In this regard, the Western Cape Government has positioned its Growth for Jobs Strategy as a key pillar in unlocking employment by generating economic growth.

WESTERN CAPE GROWTH FOR JOBS STRATEGY

Over recent years, the WCG has identified the need for a strategy to increase the Provincial economic growth rate and, to the extent that growth continues to falter in South Africa, decouple the Province's growth trajectory from that of the rest of the country. This gave rise to the Western Cape Growth for (G4J) Jobs Strategy, first published in 2023. The G4J priority focus areas are as follows:

- Creating Growth Opportunities through Investment.
- Stimulating Market Growth through Exports and Domestic Markets.
- Energy Resilience and Transition to Net Zero Carbon.
- Water Security and Resilience.
- Technology and Innovation.
- Infrastructure and Connected Economy.
- Improved Accessibility to Economic Opportunities and Employability.

The strategy's vision is for a provincial economy that achieves breakout economic growth, resulting in sufficient employment and business opportunity and a sustainable, resilient, diverse and thriving economy – one that generates confidence, hope and prosperity for all.

This vision is further expressed through the goal that by 2035, the Western Cape will be a R1-trillion inclusive economy in real terms and growing between 4.0 per cent and 6.0 per cent annually. This will be achieved through enabling a competitive business environment in which growth is driven through businesses seizing opportunities.



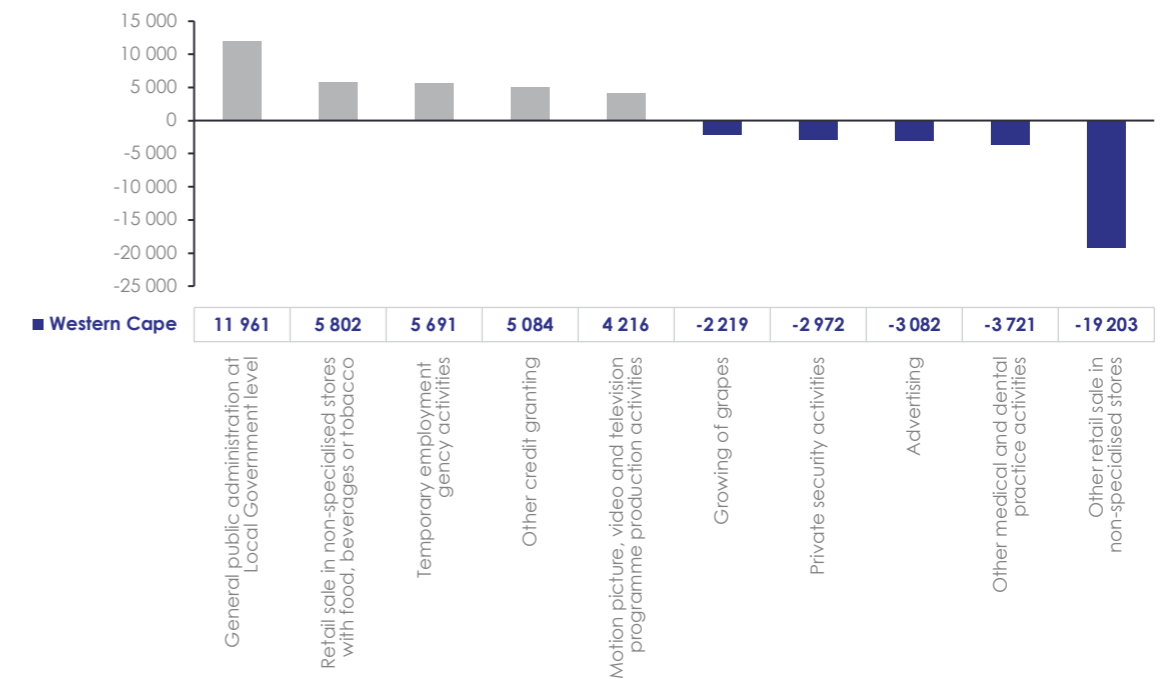
Source: Western Cape Government, 2023



The full Growth for Jobs Strategy can be viewed using the QR code

In the Western Cape, formal sector job fluctuations align with the region's GDPR performance. Notably, local government administration saw the largest job gains, adding 11 961 positions. In contrast, the retail sector experienced the most significant job losses, with 19 203 jobs lost in other retail sale non-specialised stores. However, in retail sale in non-specialised stores with food, beverages or tobacco, there was a recovery, with the sector seeing a rebound of 5 802 jobs through retail sales in non-specialised stores with food, beverages or tobacco. The retail sector's job decline, in particular, is influenced by the rise of online shopping, changing consumer preferences, and heightened competition. Additional job losses occurred in other medical and dental practice activities, advertising and private security.

Figure 11
TOP FIVE OCCUPATIONS FOR FORMAL EMPLOYMENT¹² GAINS AND LOSSES, 2023



Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

Employment in the informal sector is showing a strong recovery from the impacts of COVID-19. Historically, the informal sector has been a significant contributor to employment opportunities within the Western Cape Province and its districts, accounting for one in every four jobs. However, post-COVID, this declined to one in every five or six jobs, largely due to limited access to capital leading to a lag in economic recovery. Expectations are for this trend to improve over time.

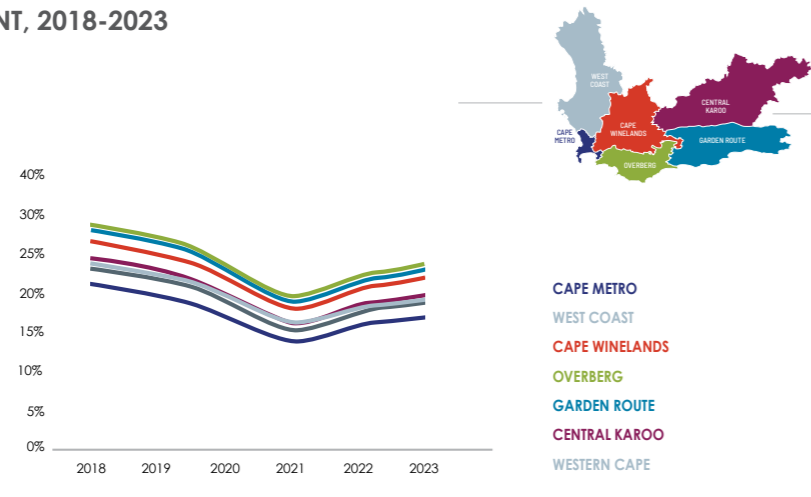
¹² Due to the in-depth data made available through SARS and the HSRC, this publication is able to present FTE employment data at a more disaggregated level than would be possible using only GDPR data, which is aggregated to a 10-sector level.

INFORMAL EMPLOYMENT

Informal employment plays a vital role in providing jobs, where formal opportunities are scarce. It serves as a crucial income source for the working poor, offering flexibility and acting as a safety net for those facing barriers to formal employment, such as lack of education, skills, or adverse economic conditions (Outlook, 2024). From spaza shop owners in the Cape Metro to hairdressers operating from homes in Beaufort West, the informal sector is essential for generating employment opportunities in the Province.

Typically, the informal economy expands during economic downturns, as individuals who lose formal jobs often turn to informal work or self-employment. Currently, the informal sector is in a recovery phase since the pandemic, but it is progressing more slowly than the formal economy.

Figure 12
INFORMAL EMPLOYMENT AS A PERCENTAGE OF TOTAL EMPLOYMENT, 2018-2023



Source: Quantec, 2024

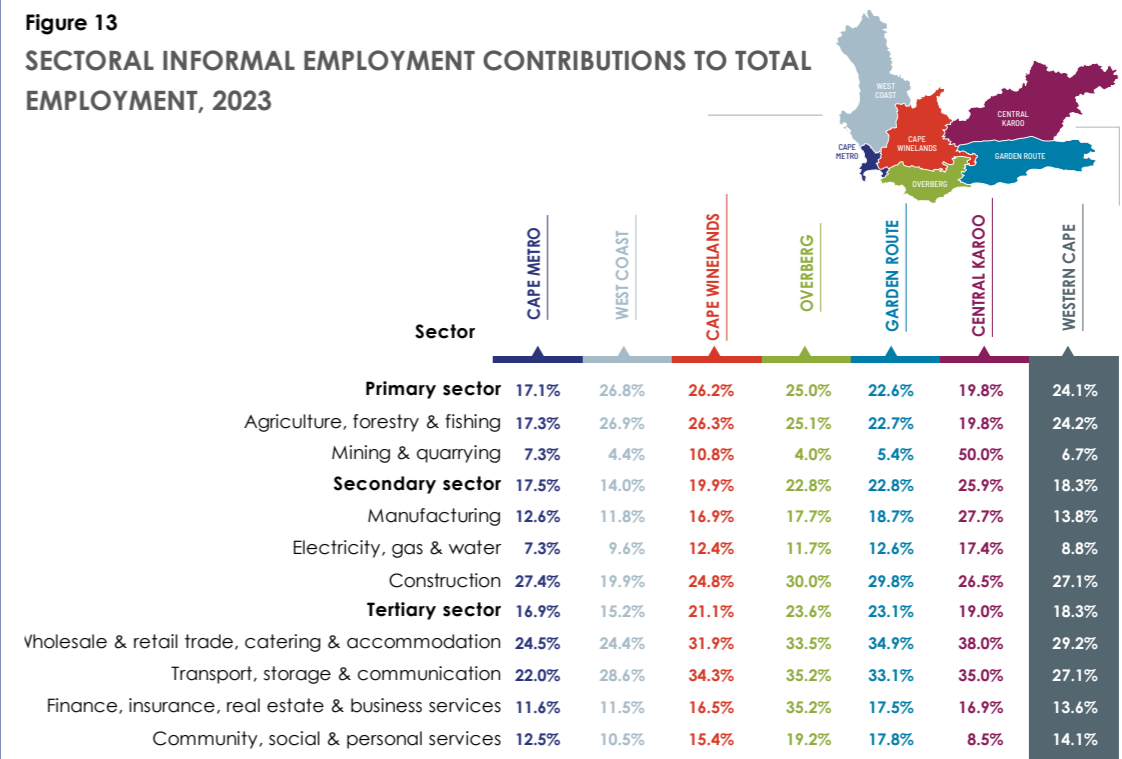
In the Western Cape, employment in the informal economy decreased from 21.9 per cent in 2019 to 15.5 per cent in 2021 due to the COVID-19 restrictions that disproportionately affected the informal economy. However, since 2021, there has been a positive rebound, with informal employment rising to 18.9 per cent in 2023. The rebound has been driven by the easing of movement restrictions that have led to the resumption of certain activities such as construction, which stimulates micro-informal economies around their building sites.

Informal employment is concentrated in some sectors relative to others. The wholesale and retail trade, catering and accommodation sector consists of the highest proportion of employees in the informal economy. The data shows that 27.7 per cent of individuals in the wholesale and retail trade, catering and accommodation sector are informally employed in the Province. This proportion is higher in CKD and GRD at 36.5 per cent and 33.2 per cent, respectively, because of the prevalence of low-income residents who depend on spazas for affordable products.

The construction sector also consists of high levels of informal employment, with 26.6 per cent of individuals in the construction sector informally employed in the Province, and this is higher than 29.3 per cent in OD and GRD. Mining and quarrying, while contributing 7.1 per cent to total informal employment in the Province, has a notably high level of informal workers in the Central Karoo, where 50 per cent of mining sector jobs are informal. Notably, employment in informal transport, storage and communication and agriculture sectors contribute substantially to the overall jobs total.

The rising level of informality presents an opportunity for the Province to devise policies and strategies that can assist in formalising businesses. This can contribute towards improved wages and working conditions, creating broader economic opportunities for residents.

Figure 13
SECTORAL INFORMAL EMPLOYMENT CONTRIBUTIONS TO TOTAL EMPLOYMENT, 2023



Source: Quantec, 2024

CONCLUDING REMARKS

The economic landscape of the Western Cape and SA is marked by a complex interplay of global and local factors. The post-pandemic era has brought heightened volatility, geopolitical tensions, high lending and inflation rates, and subdued economic activity. Despite these challenges, there are emerging signs warranting measured optimism, driven by easing global oil prices, improved trade outlooks, and economic stimuli from major economies like the US and China.

Under the GNU, SA has shown signs of a potential recovery. Key indicators such as the appreciation of the Rand from R18.96/\$ to R17.60/\$, a reduction in interest rates by the South African Reserve Bank (SARB), and a modest GDP growth of 0.4 per cent in 2024Q2 point to a cautiously optimistic outlook. However, significant risks remain, including an unemployment rate rising to 33.5 per cent in the second quarter of 2024, potential electricity cost hikes, and the looming threat of climate change.

In the Western Cape, the economy expanded by 0.7 per cent in 2023, with forecasts suggesting real economic growth of closer to 1 per cent by 2024. The Cape Metro contributes over 70 per cent to the provincial GDP, while other districts like the CWD and OD have shown significant growth, driven by tourism and agriculture. The CWD's contribution to GDP increased from 10.5 per cent in 2013 to 11.2 per cent in 2023. However, regions like the WCD face challenges such as inadequate infrastructure and extreme weather conditions, which hinder their economic performance.

Employment growth in the Western Cape generally outpaces GDP growth, with the agriculture and tourism sectors being major contributors. The informal sector, which historically accounted for one in every four jobs, has shown a strong recovery from the impacts of COVID-19, now accounting for one in every five or six jobs. This underscores the need for targeted interventions to promote sustainable job growth and enhance overall employment conditions.

The Western Cape G4J Strategy aims to increase the provincial economic growth rate and decouple it from the national trajectory. The strategy focuses on creating growth opportunities through investment, stimulating market growth, ensuring energy and water security, promoting technology and innovation, and improving accessibility to economic opportunities. The vision is for a provincial economy that achieves breakout economic growth, resulting in sufficient employment and business opportunities, and a sustainable, resilient, diverse, and thriving economy.

The Western Cape is strategically positioned to drive economic growth within SA. While the Cape Metro remains the primary economic driver, enhancing contributions from other districts is crucial for creating a more economically resilient province and ensuring an equitable distribution of the economic growth. Addressing challenges such as high unemployment, climate change, and infrastructure deficits will be essential for sustaining growth and ensuring long-term prosperity for all residents.

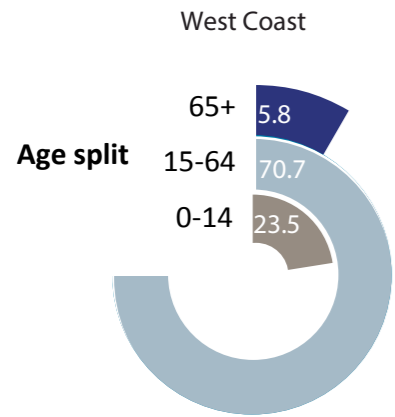


WEST COAST DISTRICT AT A GLANCE

SIZE
31 118KM² | **(24%)** of Western Cape

POPULATION
484 110 | **(6.7%)** of Western Cape

Male **50.1%** Female **49.9%**



Indigent households
24 888

Average median income
R6 730

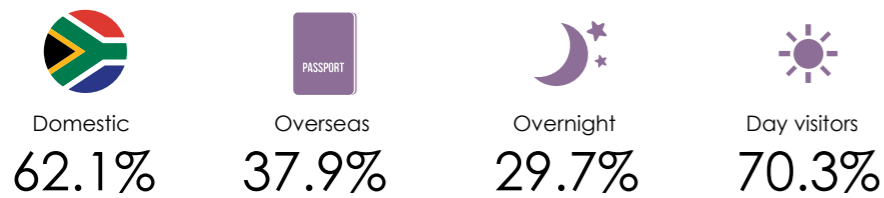
Seat **Worcester**



Access to services



Visitors



GDP (2021 - constant prices)
R29.5 Billion



Jobs employed
182 266

GDP per capita (2021 - constant prices)
R58 028

Estimated 2023 job gains
10 460

4.8%

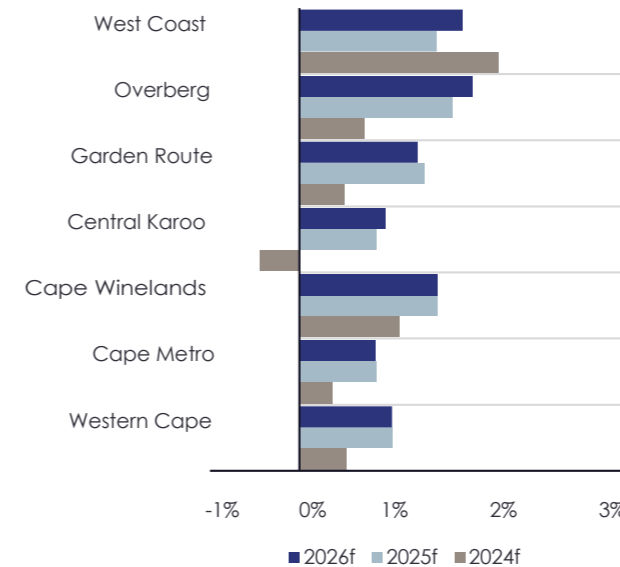
GDP contribution to Western Cape

Estimated 2023 unemployment rate
14.5%

7.1%

Contribution to Western Cape jobs employed

GDP Forecasts



International trade

Imports
R7.8 Billion
 Exports
R4.1 Billion

Top three exported products





Western Cape
Government
FOR YOU

SECTION B

Economic growth
& job creation

INTRODUCTION

The WCD boasts a unique combination of coastal beauty, outdoor adventures, and cultural diversity, making it a popular destination for tourists and outdoor enthusiasts. The most distinctive feature of the WCD is its rugged, windswept coastline, which is home to a diverse array of marine life. The area is also a haven for birdwatchers, as it serves as a critical migratory route for countless bird species. Tourism thrives here, and fishing remains a vital lifeline for many local communities.

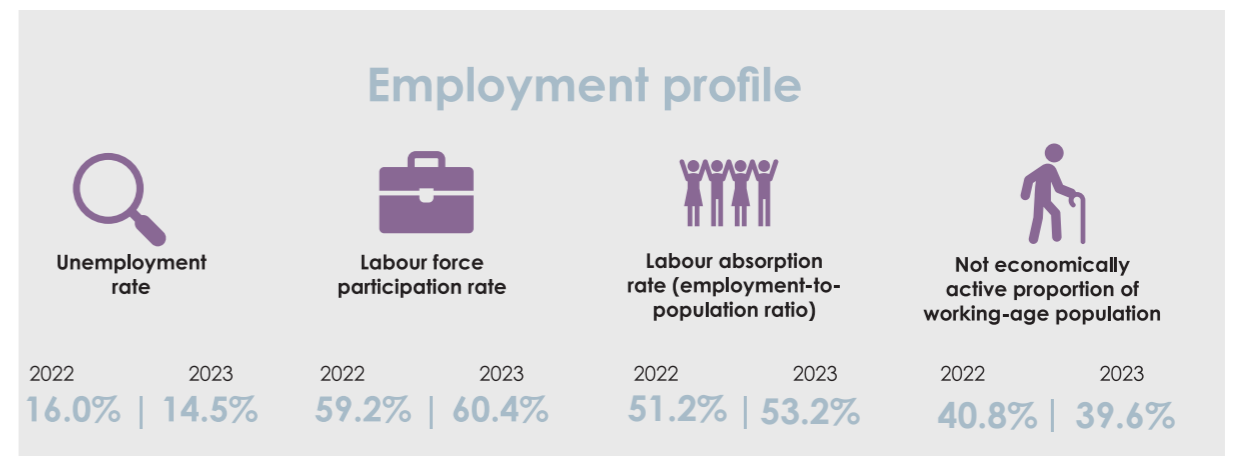
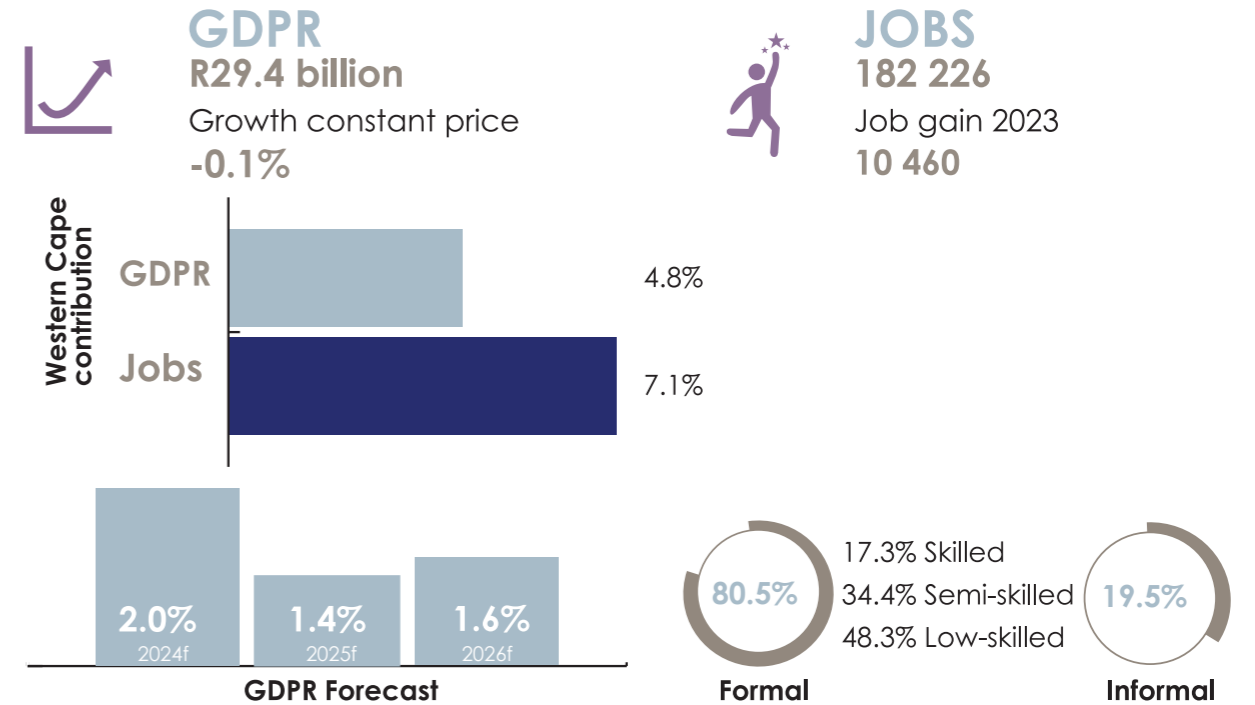
The Saldanha Bay municipal area, with its natural harbour, is crucial to South Africa's maritime industry. This area is renowned for its seafood, water-based activities such as sailing, and birdwatching at the Langebaan Lagoon. The Bergrivier municipal area, which includes charming seaside towns like Veldrif and Port Owen, offers opportunities for water sports and fishing. Additionally, the Matzikama municipal area has become a key exporter of abalone.

Further inland, the winding canals of Clanwilliam Dam support the fruit production activities of the Cederberg municipal area. These diverse economic activities are bolstered by several sectors, including international trade, tourism, and both private and public sector investments. These sectors serve as catalysts for new economic opportunities, job creation, and the overall wellbeing of local communities.

The economic prospects of the District are underpinned by the performance of these sectors, which collectively contribute to the region's growth and development. The interplay of natural beauty, economic activities, and strategic investments ensures a vibrant and sustainable future for the WCD.



District GDPR & employment performance



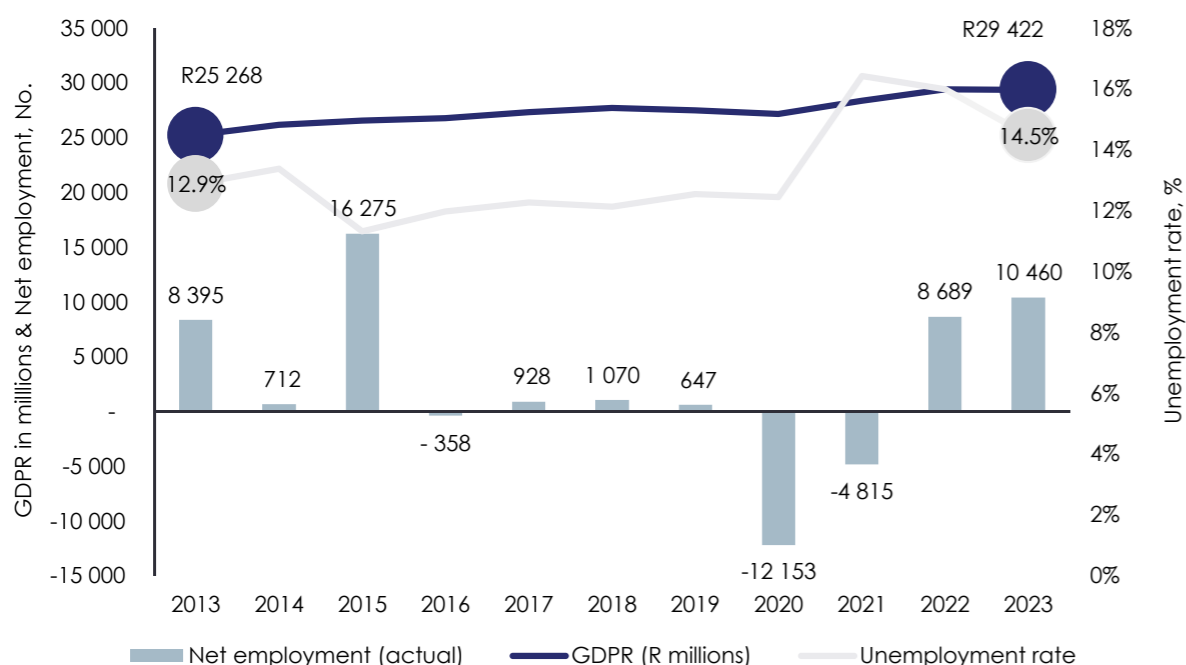
Top Five Jobs

		Top Jobs
	Growing of Grapes	8 036
	Growing of citrus fruits	7 803
	Mixed farming	7 346
	General public administration at Local Government level	4 475
	Marine fishing	4 021

REGIONAL ECONOMIC AND EMPLOYMENT PERFORMANCE

While South Africa's real GDP grew by 0.6 per cent year-on-year, the WCD's GDP decreased by 0.1 per cent from R29.5 billion in 2022 to R29.4 billion in 2023. Despite this decline, the district's economy remained resilient, driven by performances in key sectors such as transport, storage and communication, community services, wholesale and retail trade, and manufacturing. The District benefits from a diverse economy, which encompasses thriving ocean economy activity, burgeoning citrus, grape and wheat farming and cultivation, bolstered by robust agro-processing activities.

Figure 14
GDP¹³, EMPLOYMENT GROWTH AND UNEMPLOYMENT RATE, West Coast District, 2013 – 2023



Source: Quantec, 2024

Additionally, the WCD has recently seen an increase in migration from metropolitan areas, as the growing trend of remote work enables more households to relocate to the region.¹⁴ This “semigration” trend has led to a rise in demand for housing, local services, and infrastructure, further stimulating the District's economy.

Net employment is a vital metric for assessing the overall health and direction of the job market. It is calculated by taking the total number of job gains and subtracting the total number of job losses.

¹³ The previous report data was based on Gross Value Added (GVA) at current prices. However, two changes have been made. First, the data has been transformed to GDP through adding taxes and subtracting subsidies. Second, the real GDP has been included based on constant 2015 prices – in this way, the real changes in GDP are presented, and not those driven by CPI

¹⁴ Wesgro, 2024

The agriculture sector, particularly the fruit and wine industries, alongside manufacturing, were major contributors to job creation. In 2023, the District recorded a net increase of 10 460 formal and informal jobs, marking a continued recovery from the pandemic's negative impact on employment in 2020 and 2021.

The District's unemployment rate improved to 14.5 per cent in 2023, down from 16.0 per cent in 2022, signalling steady progress in reducing unemployment and fostering greater economic stability.

WEST COAST DISTRICT EMPLOYMENT PROFILE

The WCD demonstrated positive labour market trends between 2022 and 2023, surpassing the performance of the Western Cape in several key indicators. The District's participation rate improved slightly, rising from 59.2 per cent in 2022 to 60.4 per cent in 2023. This increase signals a modest but positive shift towards greater engagement in the labour market as the local economy continued to recover. In comparison, the Western Cape experienced a decline in its participation rate, from 61.9 per cent in 2022 to 61.2 per cent in 2023, signalling the increasing number of people discouraged from seeking working or a move by individuals back into furthering their education or retiring.

The employment-to-population ratio for the WCD also saw a notable improvement, rising from 51.2 per cent in 2022 to 53.2 per cent in 2023. This increase indicates that a greater proportion of the working-age population in the District are finding employment, reflecting the ongoing recovery and growth in job opportunities in the District. The Western Cape's employment-to-population ratio also improved, albeit at a slower pace, rising from 46.6 per cent in 2022 to 47.9 per cent in 2023, signalling a broader recovery in employment across the Province.

Table 1
EMPLOYMENT PROFILE, West Coast District, 2022 – 2023

	Western Cape		West Coast	
	2022	2023	2022	2023
Participation Rate ¹⁵	61.9%	61.2%	59.2%	60.4%
Employment-to-population Ratio ¹⁶	46.6%	47.9%	51.2%	53.2%
Not economically active prop to working age pop ¹⁷	38.1%	38.8%	41.9%	40.9%

Source: Quantec, 2024

Interestingly, the proportion of the working-age population that is not economically active in the WCD showed a decrease, falling from 41.9 per cent in 2022 to 40.9 per cent in 2023. This 1 percentage point decrease suggests a reduction in the number of people who are disengaged from the labour market, whether due to reasons like retirement or further education. In contrast, the Western Cape saw an increase in this proportion, rising from 38.1 per cent in 2022 to 38.8 per cent in 2023, indicating a higher share of the working-age population is not participating in the labour force across the Province.

¹⁵ The labour participation rate is calculated by dividing the number of people who are employed or actively seeking employment by the total working-age population.

¹⁶ While the unemployment level refers to the number of people that are actively seeking work, but are unable to find work, the employment-to-population specifically measures the proportion of the working age population that is employed.

¹⁷ Not economically active refers to persons aged 15 to 64 years who were neither employed nor unemployed in the reference week.

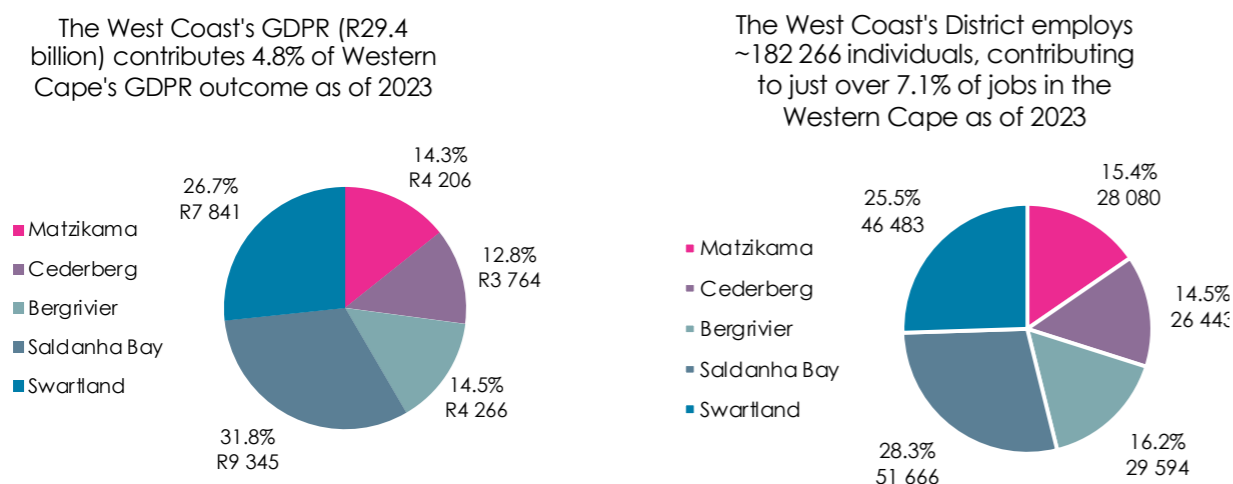
The economic performance of the WCD in 2023 was shaped by both positive developments and notable challenges. Significant infrastructure projects and business expansions provided a strong foundation for economic growth and job creation. Saldanha Bay, a key economic hub within the District, saw continued growth in its industrial and maritime sectors thanks to the existing government support through the Saldanha Bay IDZ.¹⁸ In addition, municipal areas like Swartland and Bergrivier benefited from improvements in transportation infrastructure, with road and bridge maintenance projects enhancing connectivity and supporting local businesses.

However, the District also faced significant challenges, particularly related to funding constraints, skill shortages, and climate-related disruptions. Severe weather events in 2023, including flooding and high winds, affected transportation routes and local infrastructure, causing delays in construction projects and agricultural production. These events disrupted supply chains and strained local resources, leading to short-term economic setbacks in some areas of the District.

In terms of economic contributions, Saldanha Bay was the largest contributor to the WCD's GDP and employment in 2023, accounting for 31.8 per cent of the district's total GDP and 28.3 per cent of total employment. The municipal area's economic strength is driven by the industrial, manufacturing, and maritime sectors, which continue to attract investment and create significant job opportunities. Swartland, with its agricultural and retail sectors, contributed 26.7 per cent to GDP and 25.5 per cent to employment, making it the second largest contributor to the District's economy.

Bergrivier also played a crucial role, contributing 14.5 per cent to GDP and 16.2 per cent to employment. This contribution is largely attributed to the municipal area's diversified economy, which includes agriculture, retail, and tourism. Similarly, Matzikama and Cederberg contributed 14.3 per cent and 12.8 per cent to GDP, respectively, with agriculture remaining a key driver of their economies. The employment contributions of these municipal areas were 15.4 per cent and 14.5 per cent, respectively, with agricultural and tourism sectors continuing to provide employment opportunities for local residents.

Figure 15
MUNICIPAL GDP¹⁹ (CONSTANT 2015 PRICES) AND EMPLOYMENT CONTRIBUTIONS, West Coast District, 2023



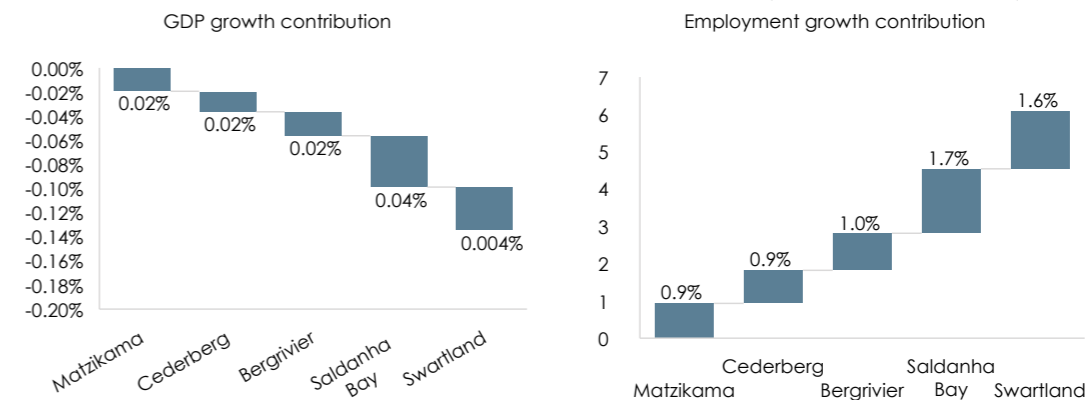
Source: Quantec, 2024

¹⁸ Saldanha Bay Municipality, 2024
¹⁹ See Note 1.

In 2023, the WCD's economy saw a 0.1 per cent contraction in GDP, with all municipalities recording negative contributions to GDP growth. Despite this, the District experienced strong employment growth of 1.1 per cent overall.

Saldanha Bay is the largest contributor to both GDP and employment declined by 0.04 percentage points. Swartland contributed 1.6 percentage points to employment growth, with its economy driven by agriculture and retail, despite a small negative GDP growth contribution of -0.04 percentage points. Bergrivier, Cederberg, and Matzikama, also experienced negative GDP growth contributions of -0.02 percentage points each. However, they all contributed positively to employment growth, with at least 0.08 percentage points each. These positive employment gains were largely driven by agriculture, particularly crop production and livestock farming, which remain key sectors in the district.

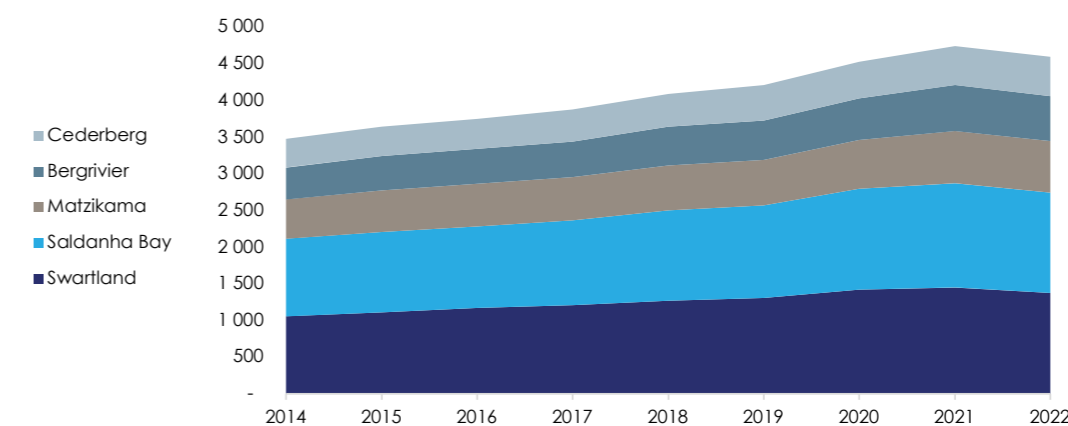
Figure 16
MUNICIPAL CONTRIBUTIONS TO GDP²⁰ AND EMPLOYMENT GROWTH, West Coast District, 2022 - 2023



Source: Quantec, 2024

The economic contributions of the five municipalities in the WCD to GDP and employment are influenced by private sector participation, as indicated by the 4 601 businesses within the District in 2022. Swartland and Saldanha Bay host 30.2 per cent and 29.4 per cent of all businesses in the District. Apart from these, the remaining municipalities host similar shares of businesses in excess of 10 per cent (with Matzikama at 15.2 per cent, Bergrivier at 11.7 per cent, and Cederberg at 13.4 per cent). Between 2014 and 2022, the net number of businesses increased by 1 119, with the majority concentrated in Swartland (322) and Saldanha Bay (311). The other municipalities also attracted similar numbers of businesses; Matzikama (164), Cederberg (144) and Bergrivier (178).

Figure 17
NUMBER OF BUSINESSES PER MUNICIPALITY, West Coast District, 2014 - 2023



²⁰ See Note 1

An analysis of the sectoral contributions to employment and GDP growth shows that the transport, storage, and communication sector was the best-performing sector in the WCD. For the year, the sector demonstrated robust performance with a growth rate of 5.6 per cent, marking it as one of the fastest-growing sectors in the District. Notably, the sector also achieved the highest employment growth, with an increase of 7.2 per cent, highlighting its significant role in job creation. Additionally, the transport sector contributed 7.5 per cent to the overall GDP. The sector was supported by improvements at the Saldanha Bay port and the industrial activity at the Saldanha Industrial Development Zone. These investments in infrastructure, including the expansion of transport networks, storage facilities, and communication systems, improved the efficiency and capacity of the sector.

Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

The finance, insurance, real estate, and business services sectors also made significant contributions to GDP and employment growth, at 2.9 per cent and 3.5 per cent, respectively. This sector's growth was driven by increased economic activities and a rising demand for financial products and services, generating a 3.5 per cent increase in employment, as financial institutions expanded their operations and required more skilled professionals to manage the growing volume of transactions and client services. The sector's significant contribution of 16.5 per cent to the overall GDP underscores its pivotal role in the regional economy. Factors such as technological advancements in fintech, supportive government policies, and a robust regulatory framework helped bolster the sector's performance.

Additionally, manufacturing contributed significantly to GDP and employment, despite muted sectoral growth. The sector grew by 0.2 per cent but this is coming off the back of load-shedding, reduced agricultural output and logistical delays. Stemming from years of agricultural developments, agro-processing activities (manufacturing) have grown in importance. Each municipal area has one or more specialisations based

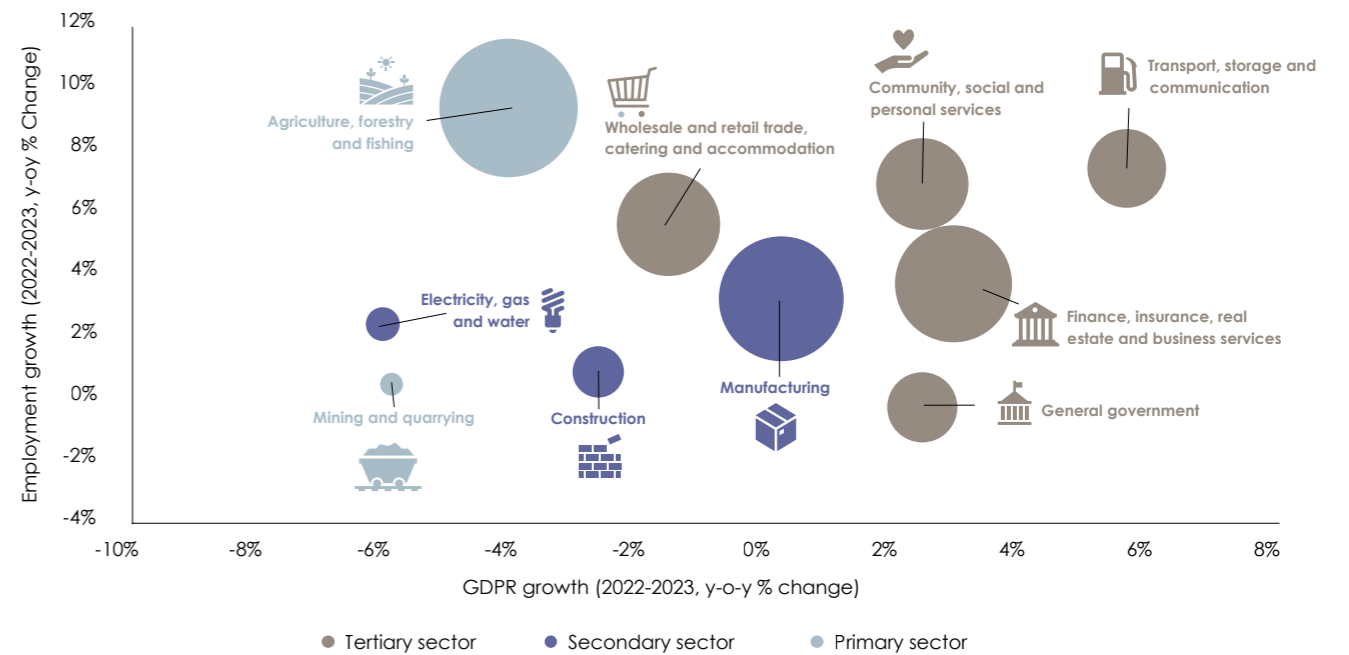
on the composition of local primary agriculture activities. Swartland focuses on meat and dairy products, Saldanha Bay and Bergrivier are leaders in fish processing, Cederberg specialises in rooibos tea production, and Matzikama is the heart of the Olifants River winemaking region.

The wholesale and retail, and agriculture sectors underperformed, and resultantly, weighed down growth prospects between 2022 and 2023 for the District. The wholesale and retail sector in the WCD contracted by 1.6 per cent but posted gains in employment. The sector contributed to 5.4 per cent towards job creation and 12.8 per cent to GDP. The decline in retail and wholesale trade is reflective of consumer's strained disposable incomes in the high-inflation and high-interest environment.

Additionally, the agriculture, forestry and fishing sector recorded a decline in GDP, despite creating the most jobs in the District. This sector encompasses the cultivation of citrus fruits (Cederberg) and grapes (Bergrivier), mixed farming activities (Swartland and Cederberg), and fishing operations (Saldanha Bay). In 2023, the agriculture sector's performance in the WCD was adversely affected by severe weather events, particularly storms and flooding. These natural disasters caused extensive damage to crops, livestock, and agricultural infrastructure, leading to decreased production, income losses, and disrupted transportation and market access. The financial burden of recovery efforts further strained the sector, highlighting the need for investment in resilient infrastructure and disaster management planning to mitigate future risks.²¹

21 Saldanha Bay Municipality, 2024

Figure 18
GDP²² AND EMPLOYMENT PERFORMANCE PER SECTOR, West Coast District, 2022-2023



Source: Quantec, 2024. Note: The bubble sizes are based on the sector

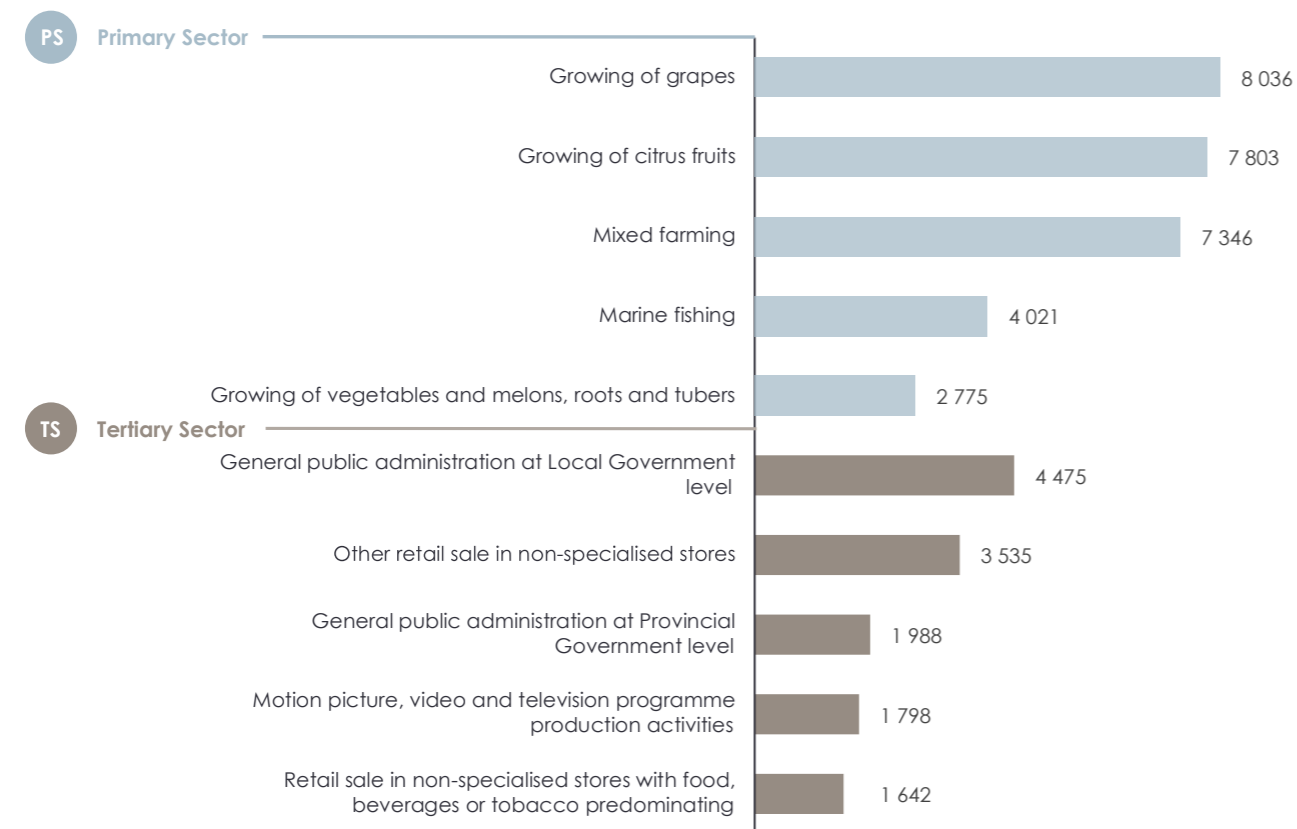
Notwithstanding low GDP contributions, the agriculture sector stands out as the top sector for Full-Time Equivalent (FTE) employment in the WCD, primarily due to its labour-intensive nature. This sector's ability to employ a large number of workers across various activities makes it a cornerstone of the local economy. From crop cultivation and livestock farming to agri-processing and distribution, agriculture provides a wide range of job opportunities for residents. Its extensive reach across different agricultural activities ensures that a significant portion of the population is engaged in employment, contributing to both economic stability and community well-being.

For WCD, fresh or dried citrus accounts for R2.9 billion of the District's total export value of R7.7 billion. The increase in jobs related to farming activities beyond citrus fruit indicates agricultural diversification. The growth of the agriculture sector holds substantial potential for job creation in WCD and for promoting local trade opportunities. It would also expand the agricultural value chain and boost local agri-processing.

Additionally, the public administration sub-sector features as the second largest employer in the tertiary activities for WCD, accounting for over 4 475 jobs at the local and 1 988 jobs at the provincial government level. Government positions offer a wide range of employment opportunities across various sectors, including education, healthcare, public safety, and administration. This diversity helps to ensure that a broad spectrum of skills and qualifications can be utilised, reducing unemployment rates and fostering a more inclusive job market.

21 See Note 1

Figure 19
TOP 10 SECTORS BY NUMBER OF FTE, West Coast District, 2023



Source: Nell, A & Visagie, J. *Spatial Tax Panel 2014 – 2024 (dataset)*. Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

While agriculture is a significant employer, the tertiary sector recorded significant net job creation. More than 1 799 jobs were created in the tertiary sector, supported by video production activities (509 jobs), retail sales (415 jobs) and business and personal services (875). This surpasses the agriculture sector's 682 job gains: the agriculture sector saw significant jobs increases but also recorded notable job losses. The largest gain was seen in the growing of vegetables (550) and the growing of tree and bush fruit (132). In contrast, there were 2 764 jobs lost in agriculture. The majority of these losses were in cultivation of grapes (1 457), citrus fruits (645), mixed farming (204) and plant propagation (153). The dynamics of the agricultural labour market makes it able to balance gains with losses during warm El Nino years.

Table 2
TOP 10 SECTORS BY NUMBER OF FTE JOB GAINS AND LOSSES, West Coast District, 2023

	Job	West Coast	Sector
Largest job gains	Growing of vegetables and melons, roots and tubers	550	Primary
	Motion picture, video and television programme production activities	509	Tertiary
	Other business support service activities not elsewhere classified	416	Tertiary
	Other retail sale in non-specialised stores	268	Tertiary
	General cleaning of buildings	162	Tertiary
	Other restaurant and mobile food service activities	149	Tertiary
	Other personal service activities not elsewhere classified	148	Tertiary
	Retail sale of clothing, footwear and leather articles in specialised stores	147	Tertiary
	Growing of other tree and bush fruits and nuts	132	Primary
	Manufacture of cement, lime and plaster	121	Secondary
Largest job losses	Growing of grapes	-1 457	Primary
	Social work activities without accommodation for the elderly and disabled	-852	Tertiary
	Growing of citrus fruits	-645	Primary
	Wholesale of construction materials, hardware, plumbing and heating equipment and supplies	-331	Tertiary
	Support activities for crop production	-305	Primary
	Construction of roads and railways	-255	Secondary
	Mixed farming	-204	Primary
	Technical and vocational secondary education	-194	Tertiary
	Plant propagation	-153	Primary
	Other processing and preserving of meat	-127	Secondary

Source: Nell, A & Visagie, J. *Spatial Tax Panel 2014 – 2023 (dataset)*. Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

The economic outlook for the WCD shows that several sectors are expected to experience growth equal to or exceeding 1.5 per cent over the next three years. The agriculture, forestry and fishing sector is likely to see an increase due to the predicted cooler and wetter conditions of La Nina in 2025, which could be favourable for farming. The finance, insurance, real estate and business services sector is expected to continue its trend of surpassing the national average growth rate, given its essential role in supporting other industries. Additionally, given the potential easing of lending conditions and improved consumer prospects, community, social and personal service growth is anticipatedly robust in the ensuing years.

Table 3
GDPR² FORECAST, West Coast District, 2012 – 2026f

	Average (2012-2019)	Average (2022-2023)	2024, f	2025, f	2026, f	Average (2024-2026)
Agriculture, forestry and fishing	2.1%	0.3%	4.9%	2.6%	2.5%	3.3%
Mining and quarrying	1.1%	-12.9%	-2.4%	-11.1%	-8.5%	-7.4%
Manufacturing	2.0%	1.1%	1.2%	1.4%	1.4%	1.3%
Electricity, gas and water	-3.1%	-4.9%	-7.5%	-1.9%	-3.2%	-4.2%
Construction	0.8%	-3.8%	-2.4%	-2.8%	0.2%	-1.7%
Wholesale and retail trade, catering and accommodation	1.8%	1.2%	0.5%	0.4%	0.4%	0.4%
Transport, storage and communication	0.0%	13.2%	0.0%	-0.5%	0.6%	0.1%
Finance, insurance, real estate and business services	2.9%	3.2%	3.0%	2.7%	2.7%	2.8%
General government	2.4%	1.6%	0.8%	1.5%	1.3%	1.2%
Community, social and personal services	2.7%	2.3%	2.3%	1.9%	1.9%	2.0%
Total	1.8%	1.8%	2.0%	1.4%	1.6%	1.7%

Source: Quantec, 2024



Comparative advantage

The sectoral comparative advantages of the WCD can be leveraged to promote local economic growth and job creation. When a sector has a comparative advantage in a region relative to the rest of the country, businesses can capitalise on its local strengths in efficiency and production. The sector is typically able to meet local needs while also serving a larger market outside the region.

A location quotient greater than one indicates that the sector in question has a comparative advantage in the region relative to its competitiveness nationally. A location quotient of less than one suggests that the sector's position in the region is weaker than its position nationally. A location quotient of one indicates that the sector has the same advantage regionally as it does nationally.

Location quotient	Interpretation
Less than 1	The region has a lower concentration of the industry or occupation than the larger area. This may indicate a high import propensity, and opportunity for growth.
Equal to 1	The region and the larger area have the same proportion of the industry or occupation. This indicates that the region is economically diverse.
Greater than 1	The region has a higher concentration of the industry or occupation than the larger area. This suggests specialisation in that sector. Therefore, the sector is serving needs beyond the border, exporting goods and services in this sector.

Looking at the local quotients for the WCD in 2023, the importance of agriculture, forestry and fisheries is evident. This sector has enough capacity and capabilities to service the regional economy while exporting to other parts of the country and abroad. The same can be said for the manufacturing sector and the mining and quarrying sector (although in the latter case, the sector's economic contribution is minor, and as a result, export performance will be modest).

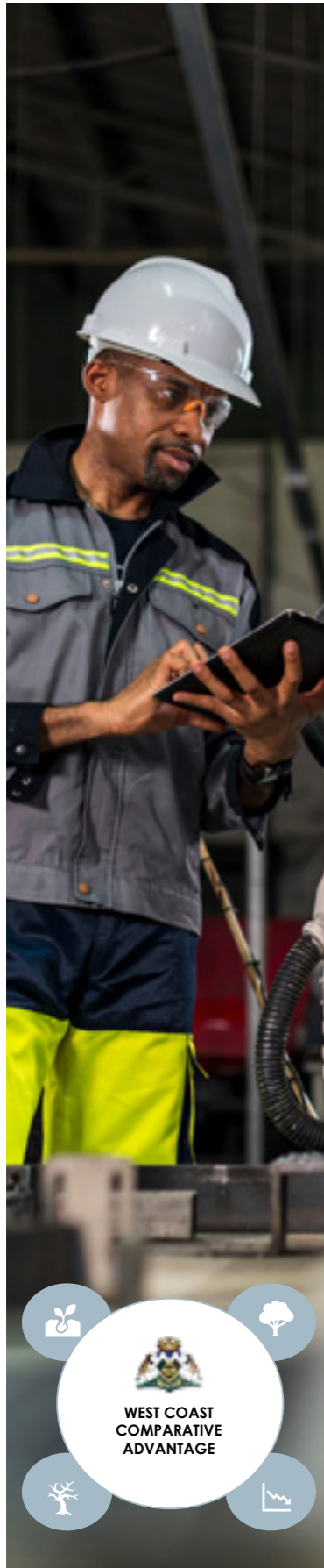
Table 4
LOCATION QUOTIENT IN TERMS GVA, West Coast District, 2023

	Location quotient relative to Province	Gross value added at basic prices
Agriculture, forestry and fishing	5.43	1.6%
Mining and quarrying	4.05	0.0%
Manufacturing	1.32	1.2%
Electricity, gas and water	0.70	0.1%
Construction	0.86	0.2%
Wholesale and retail trade, catering and accommodation	0.95	0.9%
Transport, storage and communication	0.68	0.5%
Finance, insurance, real estate and business services	0.49	1.1%
General government	1.01	0.4%
Community, social and personal services	0.87	0.7%

Source: Quantec, 2024

Combining this evidence on location quotients with stages of industry growth, there are a few key areas that could flourish with targeted interventions.

- Primary sector
- Secondary sector
- Tertiary Sector



Emerging sectors

Low and medium comparative advantage, but growing

-  Wholesale and retail trade
-  General Government
-  Finance, insurance, real estate and business services
-  Community, social and personal services

Mature sectors

High comparative advantage and growing

-  Manufacturing


Troubled sectors

Low and medium comparative advantage, but declining

-  Mining and quarrying
-  Electricity, gas and water
-  Transport, storage and communication
-  Construction

Mature and declining

High comparative advantage, but declining

-  Agriculture, forestry and fishing

Emerging sectors have a location quotient of less than one, but the location quotient is increasing over time. While the comparative advantage of such sectors is low, targeted interventions can be used to help them improve their comparative advantage

Mature sectors have a location quotient of more than 1. The quotient is increasing over time, indicating that the local comparative advantage of these sectors is growing relative to the advantage they have elsewhere in the country. Such sectors should be the focus of development initiatives.

Troubled sectors have a location quotient of less than one that is diminishing over time. There is little possibility that these sectors will enable large-scale economic growth and job creation.

Mature sectors that are losing ground have a location quotient of more than one; however, their comparative advantage is diminishing. These sectors are at risk and therefore need special investigation and intervention to help them retain their comparative advantage

The manufacturing sector in the WCD boasts a high comparative advantage and maturity, driven by strategic factors. Its proximity to major ports and transportation networks ensures efficient logistics and market access. A skilled workforce, supported by local training institutions and industry partnerships, provides a steady supply of qualified labour. Established manufacturing hubs and industrial parks offer robust infrastructure for diverse activities, from food processing to metal fabrication. Government support, including incentives and policies, contributes towards industrial growth and innovation. Overall, the strategic location, skilled workforce, robust infrastructure, government support, and technological innovation cement the manufacturing sector's high comparative advantage and maturity in the WCD.

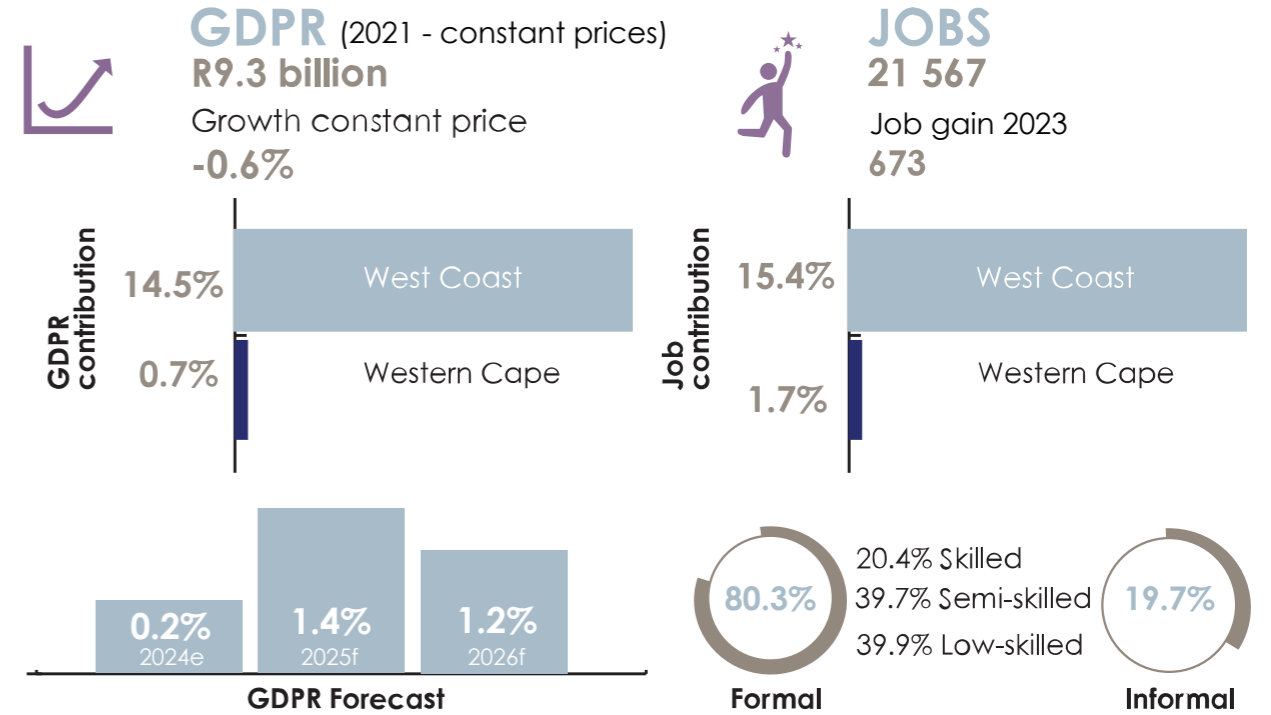
In the WCD, emerging sectors such as wholesale and retail trade, general government, finance, insurance, real estate and business services, and community, social, and personal services exhibit low to medium comparative advantages. The wholesale and retail trade sector benefits from the region's strategic location and improving infrastructure, which facilitates the distribution of goods and services. However, the sector faces competition from more established urban centres.

The general government sector is supported by ongoing public investments and initiatives aimed at regional development, yet it is constrained by limited local resources and administrative capacity. The finance, insurance, real estate, and business services sector is gradually expanding due to increasing economic activities and a growing demand for professional services, but it still lags major financial hubs in terms of scale and sophistication.

Community, social, and personal services are essential for the well-being of the local population, with gradual improvements in healthcare, education, and social services. However, these services often face challenges related to funding, infrastructure, and skilled personnel. Overall, while these sectors are emerging and show potential for growth, they currently possess low to medium comparative advantages due to various structural and competitive limitations.

Crucially, the agriculture, forestry, and fishing sectors, despite having historically high comparative advantages, are experiencing a mature yet declining phase. Agriculture has long been the backbone of WCD, benefiting from favourable climatic conditions, rich natural resources, and a specialised workforce. However, challenges related to fishing quotas, climate change and environmental degradation are increasingly impacting crop yields and making traditional practices less sustainable. Therefore, despite the high comparative advantage, the sector is experiencing challenges that are difficult, but necessary, to navigate in order to revitalise and sustain its long-term viability.

Municipal GDPR & employment performance



2.051KM² |
 6.4% of the
 West Coast

Vredenburg

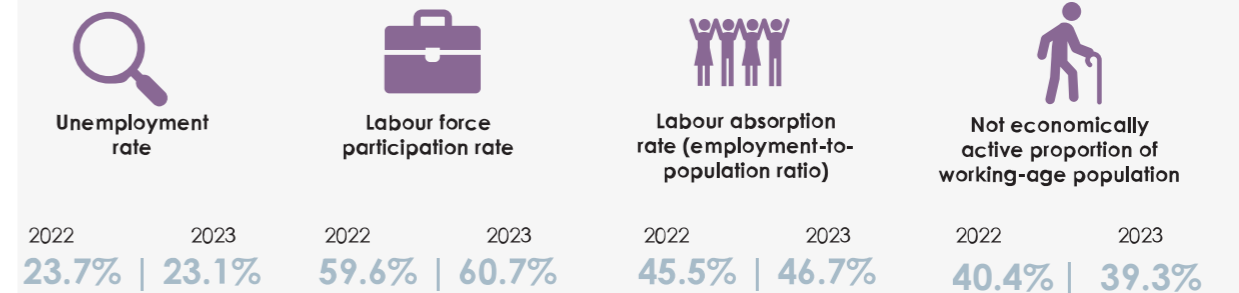
SALDANHA BAY

MUNICIPAL GDPR AND EMPLOYMENT PERFORMANCE

The Saldanha Bay municipal area is home to a vibrant and diverse economy, anchored by its most prominent feature: the vast natural harbour that surrounds the town of Saldanha Bay. As the largest and deepest natural port in southern Africa, the Port of Saldanha plays a crucial role in the region's maritime activities. The harbour is partially protected by an artificial breakwater, offering a safe haven for vessels and creating a unique environment that attracts maritime enthusiasts, fishermen, and birdwatchers.

Saldanha Bay, the largest town in the area, is a key industrial and logistical hub, with a thriving harbour, steel mill, and IDZ contributing significantly to its economy. It is also a gateway to the region's natural wonders. Nearby Langebaan, known for its stunning lagoon and crystal-clear waters, is a popular destination for windsurfing and kitesurfing. The West Coast National Park, with its unique fynbos and diverse birdlife, draws nature lovers and tourists alike. Other notable towns in the area include Vredenburg, the commercial centre offering modern amenities and shopping, and Paternoster, a picturesque fishing village famed for its seafood and whitewashed cottages. Inland, Hopefield supports the agricultural sector, serving as a hub for grain, dairy, meat, and honey production, while Langebaanweg hosts a South African Air Force base.

Employment profile



Top Five Jobs

	Marine fishing	3 650
	General public administration at Provincial Government level	1 265
	Fresh water fishing	982
	Other personal service activities	800
	General public administration at Provincial Government level	608

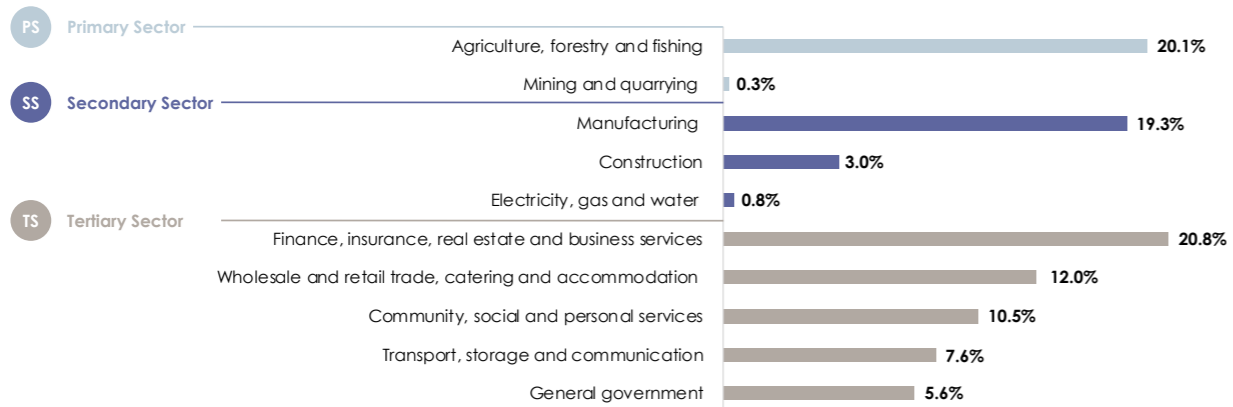
Saldanha Bay has the largest economy in the WCD, contributing 31.8 per cent to the total GDP, amounting to R9.3 billion in 2023. The municipal area also accounts for 28.3 per cent of total employment in the District, with 51 666 jobs. A significant portion of the workforce holds semi-skilled positions (34.4 per cent), while 39.9 per cent are classified as skilled.

Saldanha Bay's economy is highly diversified, with its agriculture, manufacturing and finance sectors contributing the lion's share of employment (over 60 per cent in total employment occurs in these three sectors). Maritime activities, including the Port of Saldanha and related industries, are the largest source of formal employment, further strengthening the area's economic foundation.

The manufacturing sector, particularly fish farming and processing, is another significant contributor, accounting for 19.3 per cent of the GDP. The municipal area is home to several fishing companies and fish processors, including the Oceana Group, Pioneer Fishing, West Point Processors, Umoya Fish Processors, BP Marine Fish Products, Gannet Sea Products, Hannasbaai Fishing Company, West Coast Abalone, Paternoster Fishery, and Visko Seeprodukte. The municipal area is susceptible to strict regulations such as changes in the total allowable catch values for species such as West Coast rock lobster and small pelagic fish, which are used for canning, fishmeal, and oil production.

The finance, insurance, real estate, and business services contributing 20.8 per cent to GDP. The finance sector, primarily based in Vredenburg, plays a critical role in the local economy, supporting businesses and services across the region.²² Wholesale and retail trade, catering, and accommodation, along with transport, storage, and communication, also play vital roles. Construction and electricity, gas and water, add to the region's economic dynamism.

Figure 20
GDPR SECTORAL CONTRIBUTIONS IN CONSTANT 2015 PRICES, Saldanha Bay, 2023



Source: Quantec, 2024

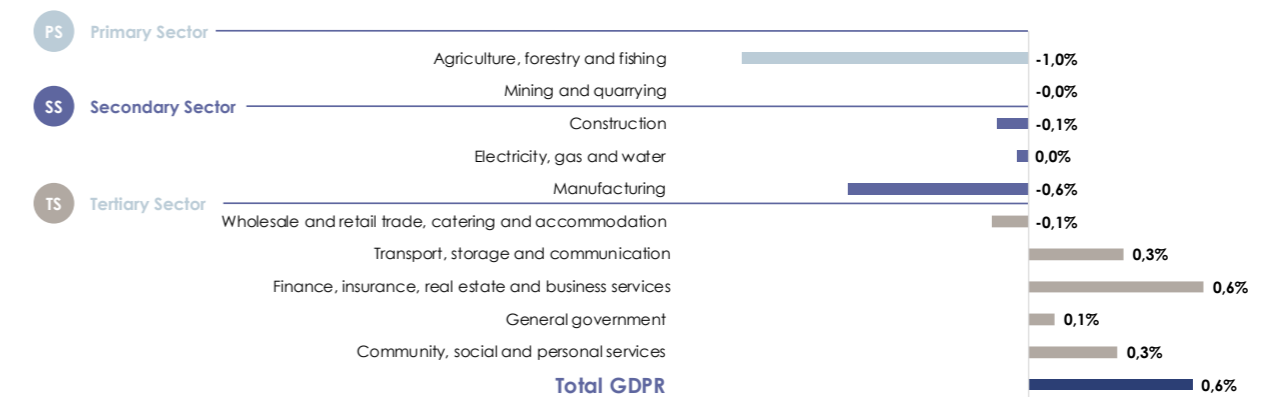
This diverse sector mix in Saldanha Bay yielded a modest decline in GDP growth of -0.6 per cent in 2023. While the overall economic growth showed a contraction, some sectors displayed relatively more resilience. The manufacturing sector, the best-performing from a growth perspective between 2022 and 2023, contributed 1.1 percentage points to GDP growth, with more modest positive contributions attributable to the transport, finance and community services sectors.

Most prominently, the agriculture and wholesale sectors contributed the most to a decline in the GDP growth rate, with the agriculture sector in particular showing for a 1.3 percentage point contribution to the net decline in the Saldanha Bay GDP. This decline reflects the ongoing risks associated with environmental factors, such as climate change, which continue to affect local farming and fishing industries.

21 Saldanha Bay Municipality, 2024

The mixed performance of these sectors highlights the need for Saldanha Bay to diversify its economic base further, focusing on resilience-building strategies that can help mitigate the negative impact of external shocks. By strengthening key sectors such as manufacturing and agriculture, and addressing infrastructure challenges, Saldanha Bay can build a more balanced and sustainable economic future.

Figure 21
SECTORAL CONTRIBUTIONS TO GDPR GROWTH, Saldanha Bay, 2023



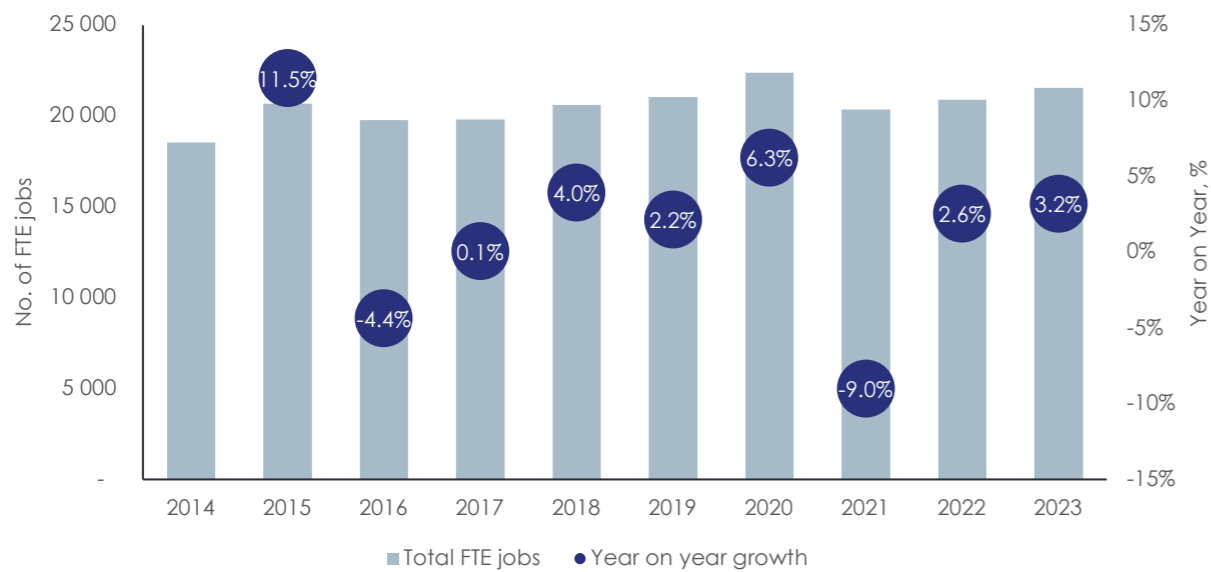
Source: Quantec, 2024

The analysis of Full-Time Equivalent (FTE) job growth in the municipal area reveals notable trends over the past decade. From 2014 to 2023, the total number of FTE jobs increased steadily, reaching 21 567 in 2023.²² This marks a 3.2 per cent year-on-year growth, reflecting a positive trend in the local labour market. The most significant growth occurred in 2021 and 2022, after a temporary decline in 2020 (-9.0 per cent), largely attributed to the impacts of the COVID-19 pandemic. Despite the challenges in 2020, the job market showed resilience in subsequent years, with the total number of FTE jobs surpassing pre-pandemic levels.

The overall growth trajectory, although positive, has been uneven, with fluctuations observed in certain years. For instance, the region saw a significant increase of 6.3 per cent in 2019, followed by a slight dip of 9 per cent in 2020, and a modest growth of 2.6 per cent in 2022. The rise in 2023 marks a return to growth after a slower pace in 2022, suggesting a recovery of momentum and a potentially stronger labour market moving forward.

22 The number of FTE jobs is derived from the SARS tax spatial data panel (2024), and differs from Quarterly Labour Force data by excluding informal employment or workers who are not liable for tax payments. This holds across all subsequent analysis

Figure 22
FULL-TIME EQUIVALENT JOBS AND GROWTH, Saldanha Bay, 2014 - 2023²³



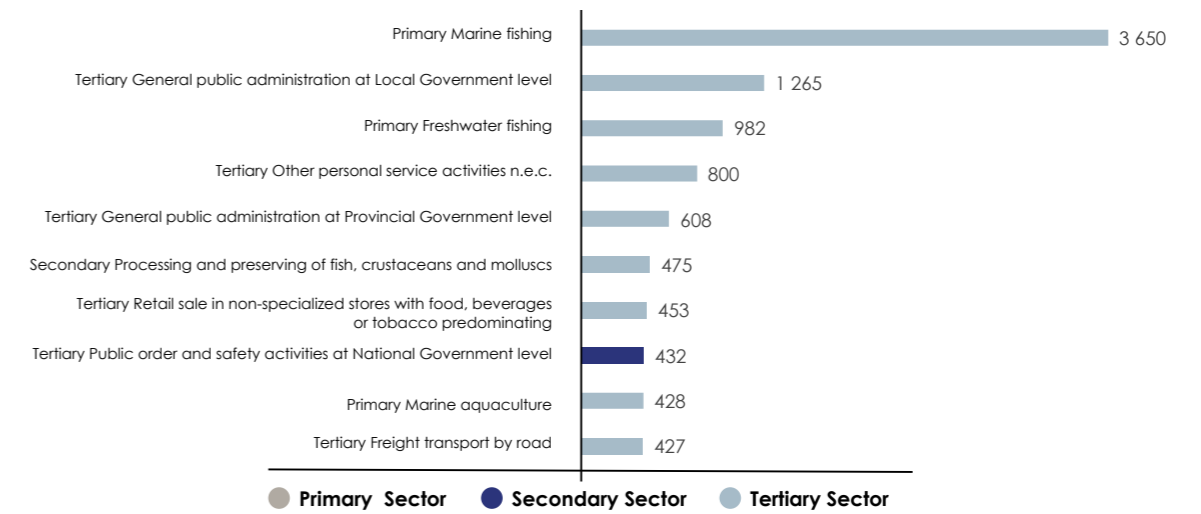
Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

Saldanha Bay's employment landscape is dominated by the marine fishing industry, with 3 650 jobs in 2023. This is followed by freshwater fishing (982 jobs) and marine aquaculture (428 jobs), which are also significant contributors to the primary sector. In addition, processing and preserving of fish, crustaceans, and molluscs (475 jobs) contributes to the secondary sector. Several businesses in the fish farming and processing industries are lead employers, and these include Oceana Group, Pioneer Fishing, West Point Processors, Umoya Fish Processors, BP Marine Fish Products, Gannet Sea Products, Hannasbaai Fishing Company, West Coast Abalone, Paternoster Fishery, and Visko Seeprodukte.

Public administration plays a crucial role in the region's employment structure. Vredenburg serves as the administrative hub of the municipal area, making local, provincial and national government a significant source of formal employment at 2 305 jobs in total. The town is home to the Saldanha Bay Municipality, along with regional offices for Home Affairs and the Department of Employment and Labour.

Other key employment sources in the tertiary sector include other personal service activities (800 jobs), retail sale in non-specialised stores (453 jobs) and freight transport by road (427 jobs) also playing essential roles in the region's economic activity. Additionally, Vredenburg Hospital, the local prison, and the South African Air Force base in Langebaanweg also contribute to employment in this sector, underscoring Vredenburg's critical role as a government and service centre in the region.

Figure 23
TOP 10 OCCUPATIONS BY NUMBER OF FTE JOBS, Saldanha Bay, 2023



Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024











Between 2022 and 2023, the municipal area experienced a net employment gain of 672 jobs, with a total of 1 660 jobs created and 978 jobs lost. This analysis underscores the importance of understanding sector-specific trends to foster balanced economic growth and address the vulnerabilities affecting job stability in the region.

The tertiary sector experienced notable job gains, particularly in general cleaning of buildings, which added 162 jobs, followed by other personal service activities (120 jobs), and other transportation support activities (80 jobs). Additionally, other restaurant and mobile food service activities contributed 73 new jobs, reflecting strong demand in food services and related industries. The primary and secondary sectors also saw gains, with shipbuilding and floating structure construction adding 68 jobs, indicating growth in the maritime and construction industries.

However, some sectors faced significant job losses. The local government public administration sector saw a reduction of 145 jobs, while freshwater fishing and the growing of cereals, leguminous crops, and oilseeds experienced losses of 70 and 66 jobs, respectively. Other tertiary sectors, such as financial services and technical education, also saw job reductions, reflecting the broader economic challenges facing the region.

²³ The reporting of the data has changed; town-level data is no longer available. The new method will report FTE figures at the municipal level

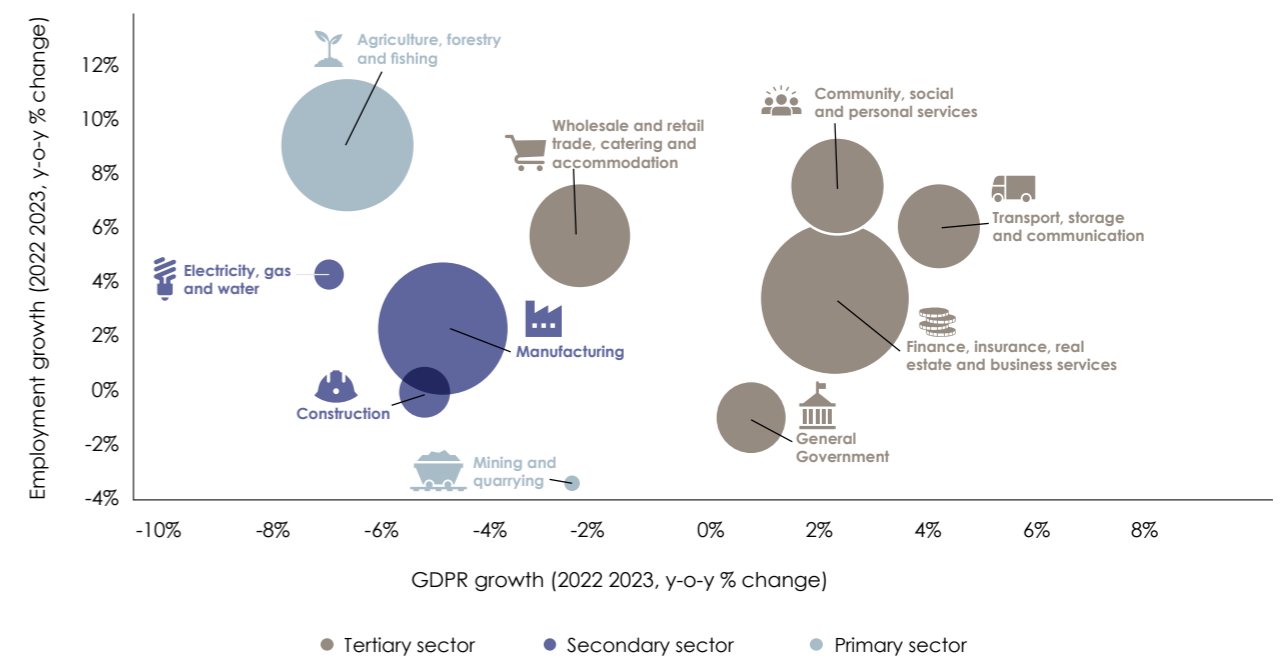
Table 24
TOP FIVE SECTORS FOR JOB CREATION AND JOB LOSSES, Saldanha Bay, 2022-2023

Total job Gains (503)		Total job Losses (-404)	
 General cleaning of buildings	162	 General public administration at Local Government level	-145
 Other personal service activities n.e.c	120	 Freshwater fishing	-70
 Other transportation support activities	80	 Growing of cereals (except rice) ,leguminous crops and oil seeds	-66
 Other restaurant and mobile food service activities	73	 Other financial service activities, except insurance and pension funding activities	-66
 Building of ships and floating structures	68	 Technical and vocational secondary education	-57

Source: Nell, A & Visagie, J. *Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024*

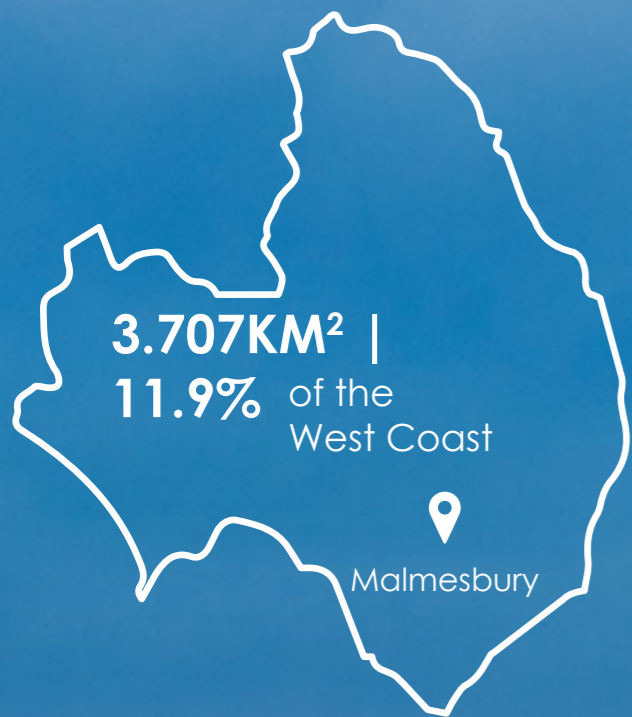
In 2023, Saldanha Bay's tertiary sector showed resilience, with significant employment growth in wholesale and retail trade, catering, and accommodation and community, social, and personal services, despite some GDP declines. The finance, insurance, real estate, and business services sector stood out, contributing the most to GDP (20.8 per cent) with steady growth. Conversely, the secondary sector faced notable challenges, particularly in manufacturing and construction, which experienced GDP declines but managed modest employment gains. The primary sector struggled, especially in agriculture, forestry, and fishing, which saw a substantial GDP decline but achieved the highest employment growth. Overall, the data underscores disparities between GDP and employment trends, highlighting the need for targeted economic strategies to address these sector-specific challenges and opportunities.

Figure 25
GDP PERFORMANCE PER SECTOR, Saldanha Bay, 2022-2023



Source: Quantec, 2024





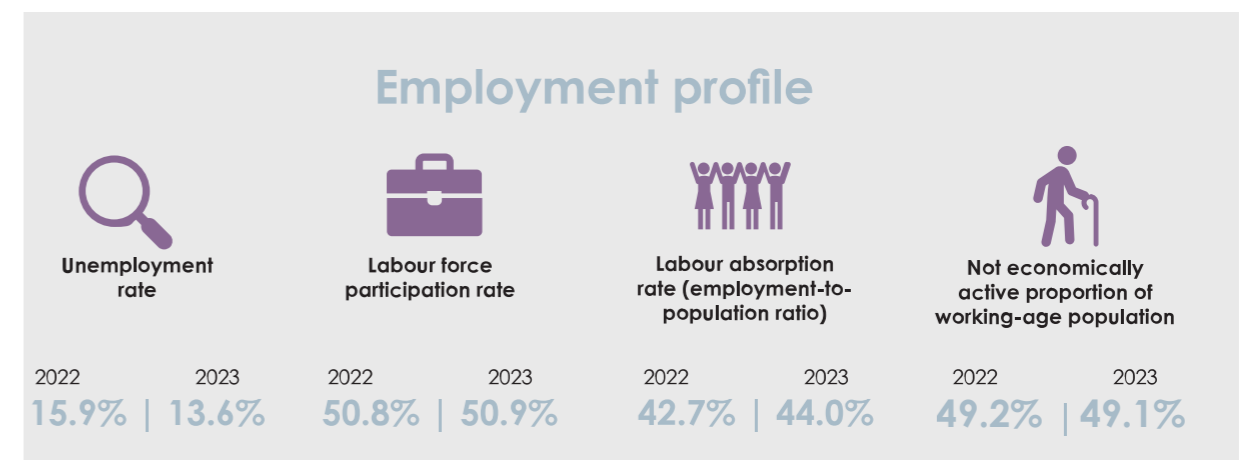
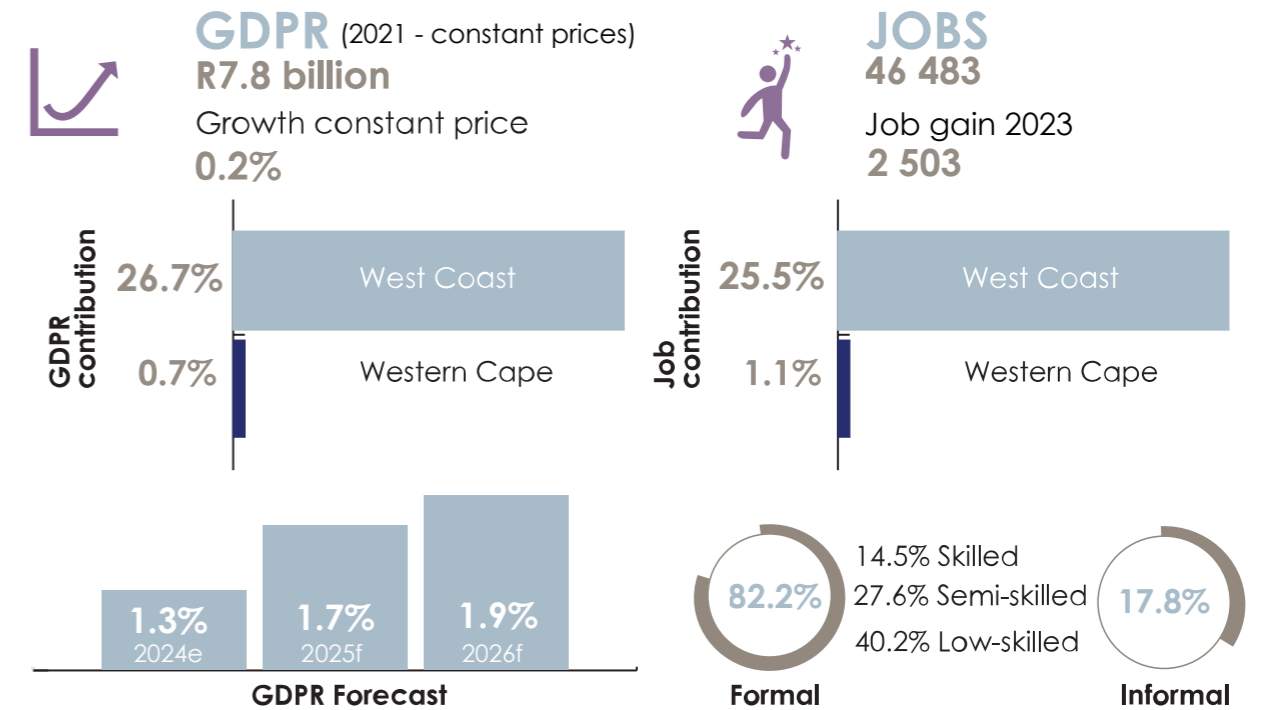
SWARTLAND

MUNICIPAL GDPR AND EMPLOYMENT PERFORMANCE

The Swartland municipal area is a captivating blend of rural charm and agricultural heritage. Known for its expansive golden wheatfields that stretch as far as the eye can see, the region is a true testament to South Africa's farming legacy. Malmesbury, the largest town and administrative hub, is famous for its historic architecture and lively community atmosphere. Just a short drive away, the picturesque twin towns of Riebeek-Kasteel and Riebeek West, nestled in the fertile Riebeek Valley, are celebrated for their Mediterranean-like charm, with vineyards, olive groves, and a rich cultural scene. Darling, an artistic enclave, is renowned for its wildflower displays, thriving wine estates, and the iconic Evita se Perron theatre, which brings a touch of theatrical magic to the area.

Moorreesburg, an agricultural centre, serves as a hub for the region's grain production, showcasing the heart of Swartland's farming lifestyle. Smaller settlements like Koringberg and Kalbaskraal, located to the north and south, are deeply connected to wheat and sheep farming. The Swartland's unique blend of agrarian landscapes, cultural richness, and artistic flair makes it a vibrant and distinctive region within the West Coast, drawing visitors for both its natural beauty and its lively cultural offerings.

Municipal GDPR & employment performance



Top Five Jobs

	Other retail sale in non-specialised stores	3 275
	Mixed farming	2 469
	General public administration at National Government level	2 235
	General public administration at Local Government level	1 634
	Growing of grapes	1 520

The Swartland municipal economy is the second largest in the WCD, contributing 26.7 per cent to the total GDP in 2023, amounting to R7.8 billion. The region also accounted for 25.5 per cent of employment in the District, providing 46 483 jobs. The economy is diverse, with a thriving retail sector in Malmesbury, which serves as the commercial hub of the region, alongside a strong public sector presence.²⁴ The manufacturing, agriculture, and wholesale and retail sectors make up the bulk of the Swartland economy (60 per cent), indicating economic diversification across primary, secondary and tertiary service sectors.

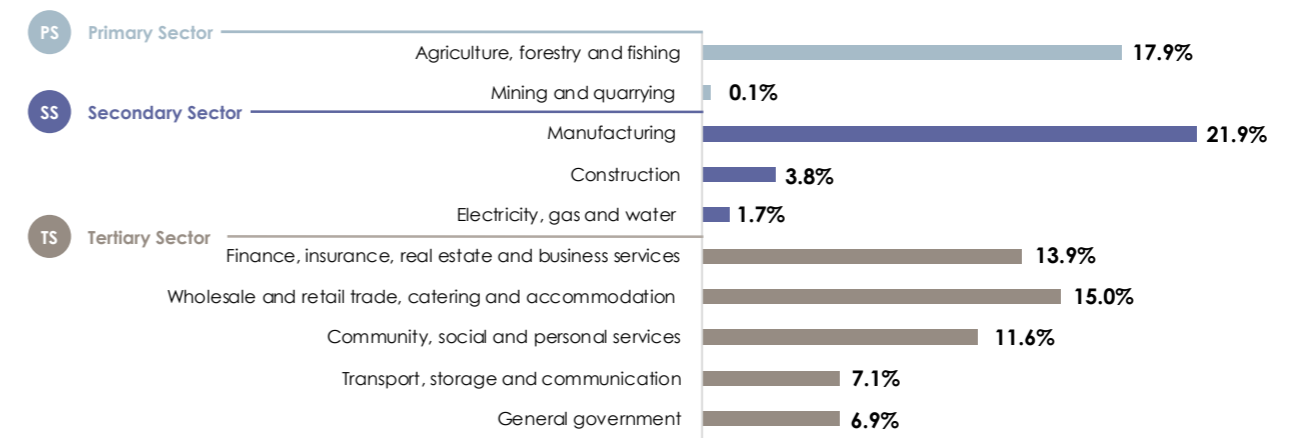
As the economy becomes more diversified, the Swartland workforce reflects this shift, with 17.6 per cent of the population employed in skilled occupations, 33.5 per cent in semi-skilled roles, and 48.9 per cent in low-skilled positions. This balanced labour force, alongside the steady growth in key sectors, underscores Swartland's evolving economic structure.

Swartland's tertiary sector is particularly robust, with wholesale and retail trade, catering, and accommodation leading at 15 per cent, thanks to a thriving retail sector concentrated in Malmesbury. Community, social, and personal services contribute 11.6 per cent, reflecting continued demand for services from the elderly and people living with disabilities. The finance, insurance, real estate, and business services sector, while slightly lower than in some other municipal areas, still makes a substantial contribution at 13.9 per cent, underscoring a solid financial and business services foundation.

Manufacturing is a key driver, contributing the highest at 21.9 per cent, highlighting Swartland's strong industrial base. The sector primarily consists of agri-processing activities, including meat processing and wine production in Riebeeck-Kasteel, dairy production in Darling, and wheat milling and animal feed production in Malmesbury and Moorreesburg. Notable local producers include Darling Romery, Roelcor Malmesbury, Pioneer Foods, Sasko, Wesfed Feeds, Nova Feeds, and Group 35 Milling. The wineries along the Darling Wine Route and the farms along the Swartland Wine & Olive Route significantly contribute to tourism in the area. Additionally, the municipal area hosts Swartland, a local wood processor based in Moorreesburg with a nationwide presence, renowned for its wooden and aluminum windows and doors. Dynamic Bags in Moorreesburg is a leader in manufacturing heavy-duty bulk bags used for transporting agricultural and other bulk products and is a trusted supplier of various textiles for commercial purposes.

The construction sector adds 3.8 percent, reflecting continued investment and expansion to meet the growing demand for goods and services. The electricity, gas, and water sector, though smaller at 1.7 percent, remains vital in supporting overall economic activities. The primary sector, particularly agriculture, forestry, and fishing, is significant, contributing 17.9 percent to the GDP, underscoring the importance of agricultural activities. Mining and quarrying contribute minimally at 0.1 percent, reflecting a lesser focus on extractive industries.

Figure 26
GDPR SECTORAL CONTRIBUTIONS IN CONSTANT 2015 PRICES, Swartland, 2023

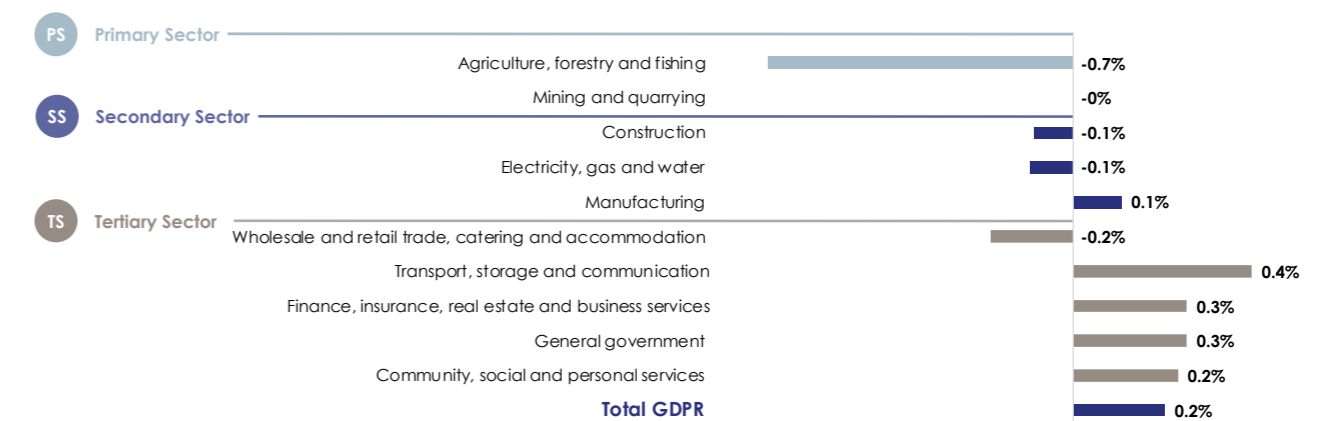


Source: Quantec, 2024

The importance of economic diversity in Swartland is clearly illustrated when examining the sectoral contributions to its total GDP growth of 0.2 per cent in 2023. The most significant contributors to economic growth included the transportation, finance, general government, and community service sectors which contributed between 0.2 and 0.4 percentage points to GDP growth for the year.

On the other hand, the agriculture and wholesale sectors saw the largest negative contributions to GDP growth (0.7 and 0.2 percentage points respectively). This negative contribution was underpinned by challenges associated with the growing season in the wake of adverse weather phenomena, and general budgetary pressure on consumers given the high interest- and inflation environment which ran its course throughout 2023.

Figure 27
SECTORAL CONTRIBUTIONS TO GDPR GROWTH, Swartland, 2023



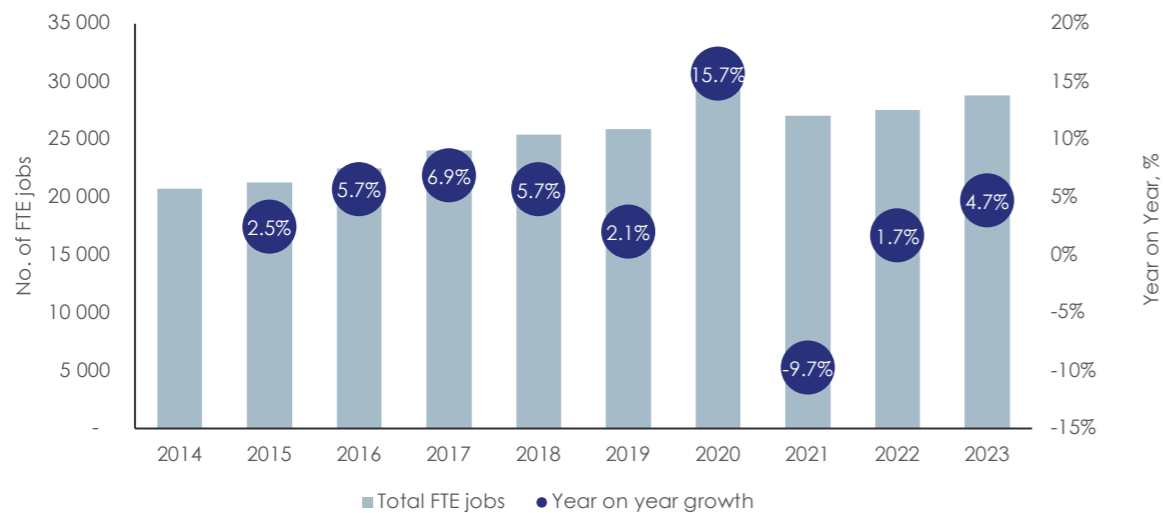
Source: Quantec, 2024

²⁴ Cape Chamber of Commerce, 2023

Swartland's total number of jobs has increased steadily, reaching 28 824 FTE jobs in 2023. This marks a year-on-year growth of 4.7 per cent, continuing the positive trend of job creation observed since 2021 following the covid-related decline. Prior to this, the region saw consistent growth from 2014 to 2019, with notable increases each year. The sharpest increases were recorded between 2016 and 2017, with a 6.9 per cent year-on-year growth, and between 2017 and 2018, with a 5.7 per cent growth. Even after the pandemic-induced downturn, Swartland's job market demonstrated resilience, returning to positive growth in 2021 with 1.7 per cent growth and a stronger recovery in 2022 (4.7 per cent).

The overall growth in FTE jobs indicates a positive trajectory for Swartland's labour market, which reflects the ongoing development of both primary and tertiary sectors in the area. Despite occasional slowdowns, Swartland continues to experience steady job creation. However, challenges such as skill mismatches, infrastructure gaps, and economic volatility may still pose risks to maintaining sustainable growth.

Figure 28
FULL-TIME EQUIVALENT JOBS AND GROWTH, Swartland, 2014 - 2023²⁵

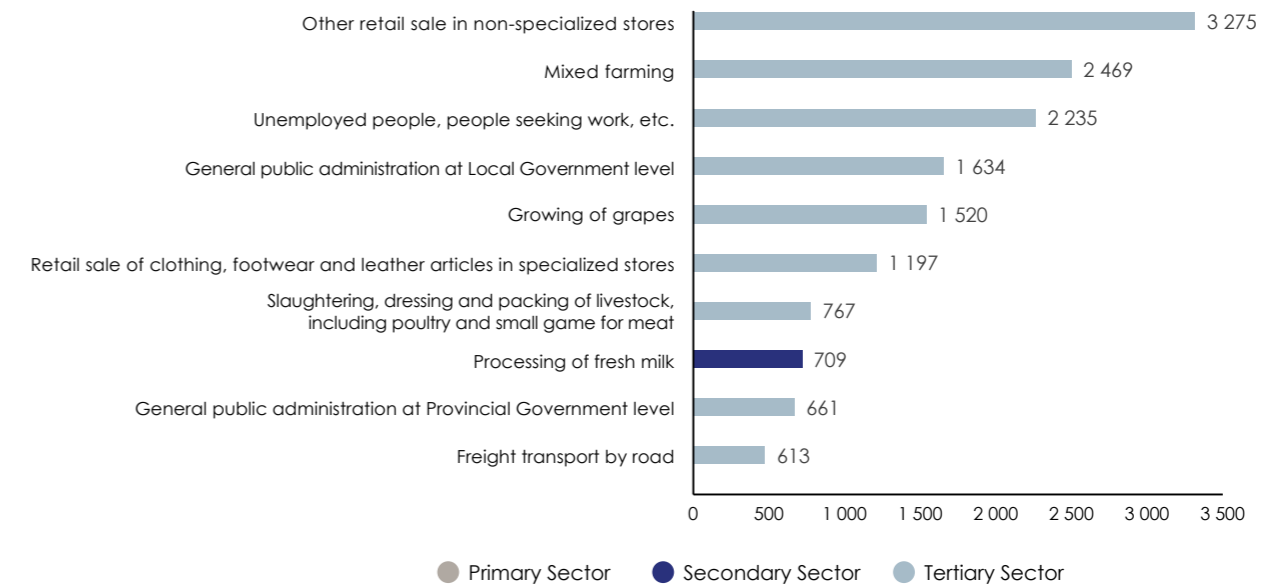


Source: Nell, A & Visagie, J. *Spatial Tax Panel 2014 – 2023 (dataset)*. Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

Swartland's labour market is anchored by agriculture, retail, manufacturing, and public administration sectors. The retail sector, particularly non-specialised stores in Malmesbury, is the largest source of formal employment, providing 3 275 full-time equivalent (FTE) jobs. Agriculture also plays a central role, with mixed farming and grape cultivation employing 2 469 and 1 520 people, respectively. Public administration adds another substantial contribution, with 1 634 jobs in local government, as well as positions in provincial and national government sectors. Manufacturing industries, including livestock slaughtering and fresh milk processing, further contribute to the local economy, creating 767 and 709 jobs, respectively. These sectors combined form the backbone of Swartland's economy, offering a broad base of employment opportunities.

Despite the economic diversity, the workforce in Swartland is predominantly semi-skilled and low-skilled, with 33.5 per cent classified as semi-skilled and 48.9 per cent as low-skilled. This skill distribution highlights the need for continued investments in education and skills development to support workforce mobility and productivity. The area's economic structure, with its strong emphasis on agriculture, retail, and public services, has resulted in a large cohort of low-skilled and semi-skilled workers. Addressing the skills gaps in the region is crucial for sustaining growth and improving the employability of residents, ensuring that Swartland can leverage its diverse economic activities for broader, inclusive development.

Figure 29
TOP 10 SECTORS BY NUMBER OF FTE JOBS, Swartland, 2023













Source: Nell, A & Visagie, J. *Spatial Tax Panel 2014 – 2023 (dataset)*. Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

Between 2022 and 2023, the region saw a total of 4 420 new jobs created against 3 121 job losses, resulting in a net employment gain of 1 299 jobs. The tertiary sector, particularly in retail (including non-specialised stores and clothing retail) and public administration, saw notable job gains. Other key contributors to job growth were the manufacture of cement, lime, and plaster, along with the processing of preserved meat products. These sectors benefited from ongoing consumer demand and investments in construction materials.

However, the primary and secondary sectors faced substantial job losses, with mixed farming suffering the most significant decline, losing 418 jobs. The social work sector also experienced severe setbacks, with a loss of 846 jobs, followed by the wholesale of construction materials and the construction of roads and railways, which together saw a combined loss of over 500 jobs. These challenges, including structural shifts in agriculture, high operating costs, and difficulties in recruitment and retention of skilled workers, have dampened the region's employment prospects. Addressing these issues will require strategic investments in infrastructure, skills development, and policies to reduce barriers for small businesses and boost growth in key industries.

²⁵ The reporting of the data has changed; town-level data is no longer available. The new method will report FTE figures at the municipal level

Figure 30
TOP FIVE SECTORS FOR JOB CREATION AND JOB LOSSES, Swartland, 2022-2023

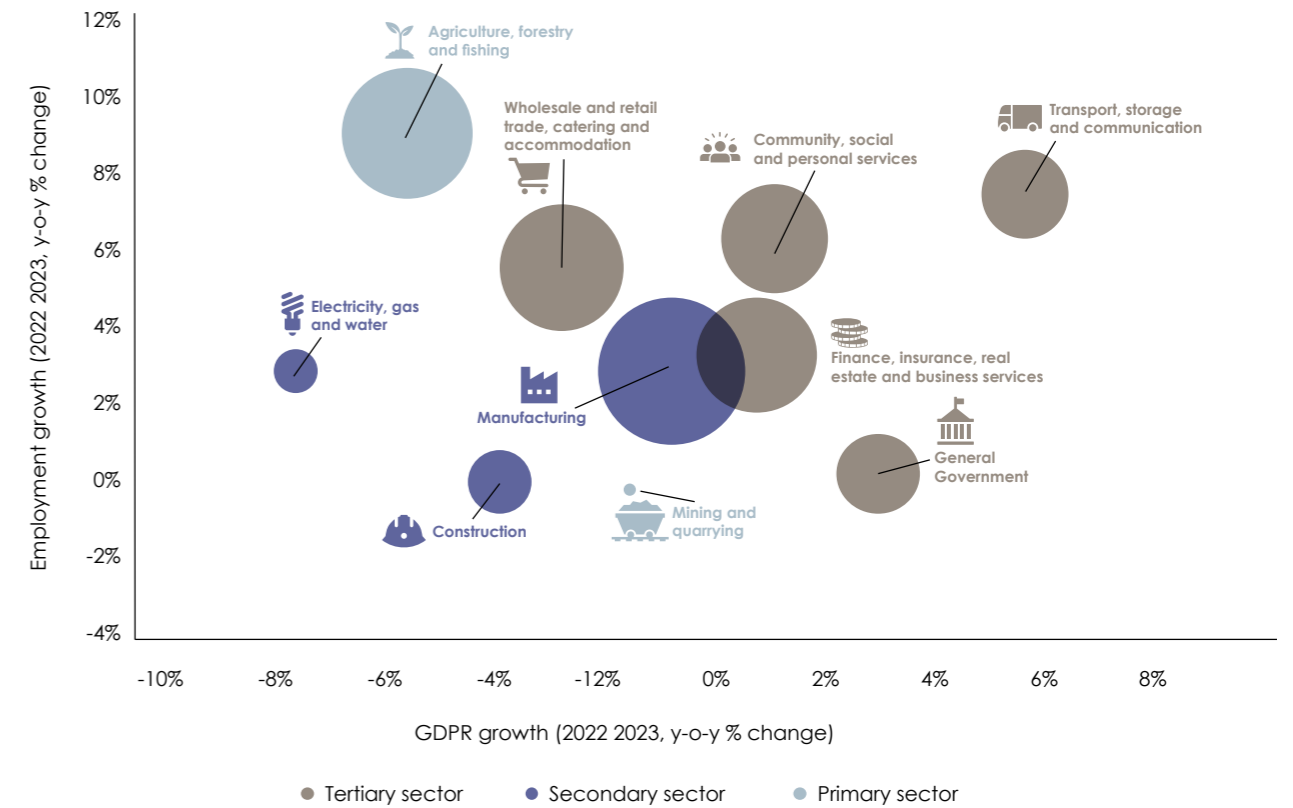
Total job Gains (4 420)		Total job Losses (-3 121)	
 Other retail sale in non-specialised stores	275	 Social work activities without accommodation for the elderly and disabled	-846
 Retail sale of clothing, footwear and leather articles in specialized stores	151	 Mixed farming	-418
 General public administration at Local Government level	140	 Wholesale of construction materials, hardware, plumbing and heating equipment and supplies	-355
 Manufacture of cement, lime and plaster	119	 Construction of roads and railways	-200
 Manufacture of prepared and preserved meat, including sausage; by-products (hides, bones, etc.)	110	 Other processing and preserving of meat	-127

Source: Nell, A & Visagie, J. *Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024*

Economic and job growth in Swartland has been anchored around the services industry, particularly the transport, storage, and communication sector. This sector continues to form the backbone of Swartland's economy, providing vital infrastructure and connectivity that support agriculture, retail, and other industries in the region. The finance, insurance, real estate, and business services sector, while contributing 13.9 per cent to GDP, saw moderate growth in employment and GDP, showing that this high-value sector remains a key driver of Swartland's economic development. The wholesale and retail trade, catering, and accommodation sector, a major employer, experienced a slight decline in GDP, despite a notable increase in employment.

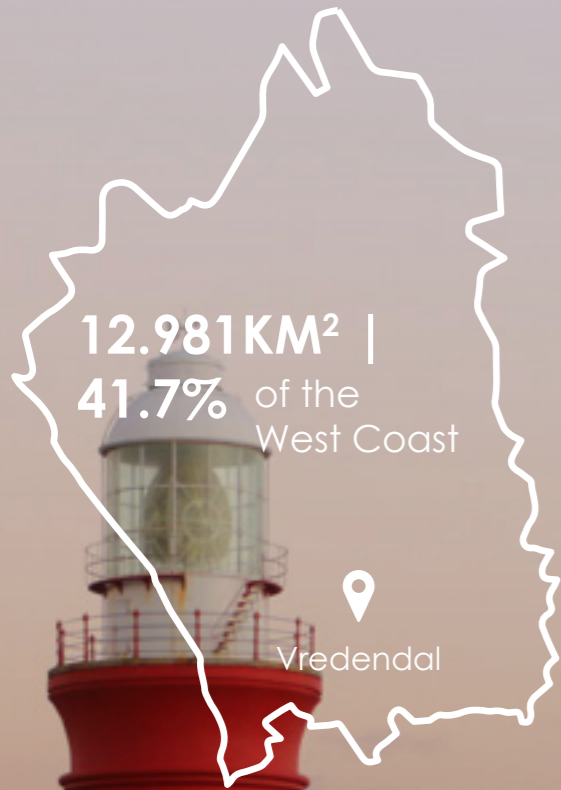
Manufacturing demonstrated resilience due to ongoing industrial activity and local production, especially in cement and processed foods. On the other hand, the construction sector faced a slowdown. In the primary sector, agriculture, forestry, and fishing remain vital to the region's employment, with a significant 9.1 per cent rise in employment, although the sector saw a decline in GDP contribution (-3.7 per cent). Despite facing challenges such as climate change, rising input costs, and fluctuating market prices, agriculture continues to be a central pillar of Swartland's local economy. Conversely, mining and quarrying remained a minor sector, contributing minimally to both GDP and employment, with virtually no change in its performance.

Figure 31
GDP PERFORMANCE PER SECTOR, Swartland, 2022-2023



Source: Quantec, 2024





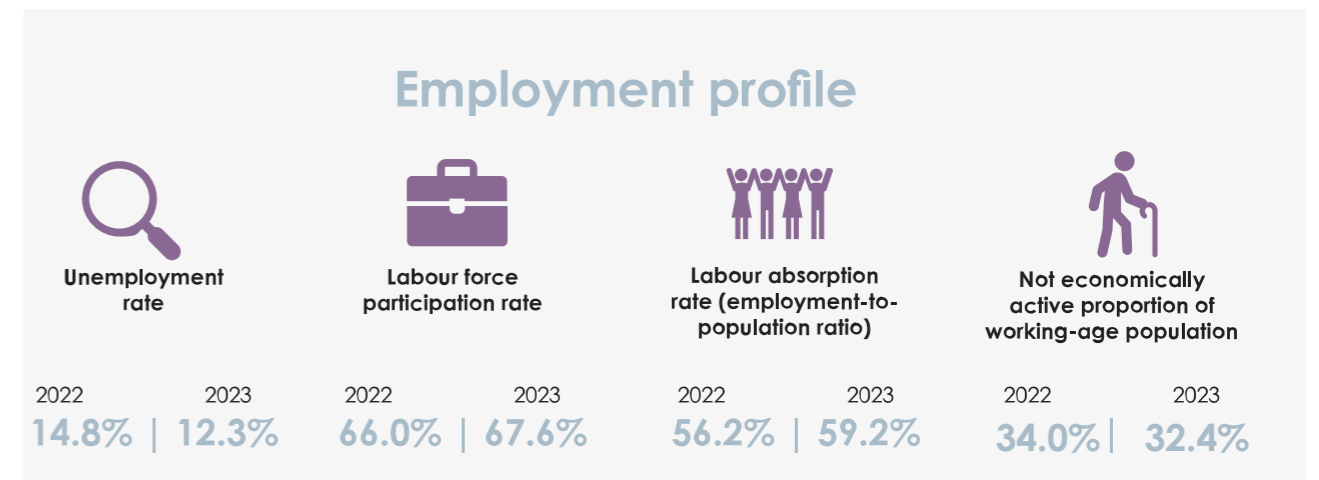
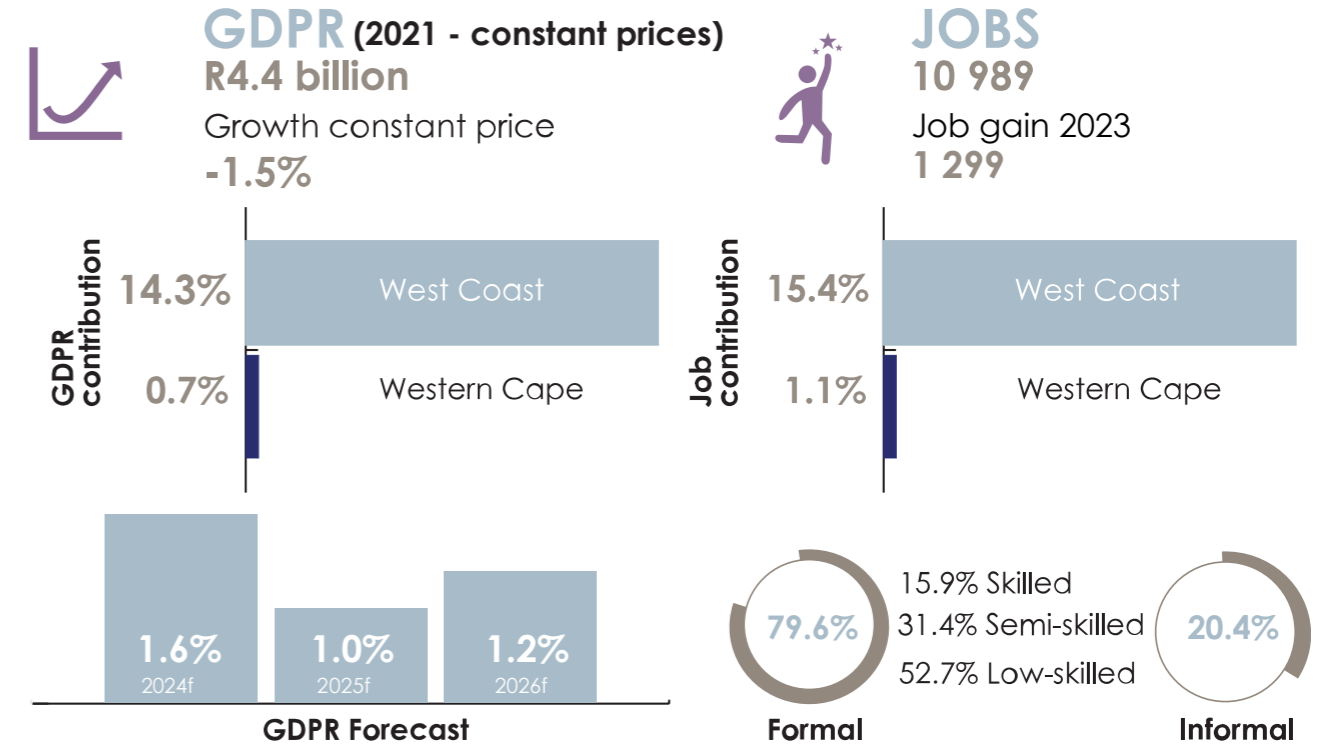
MATZIKAMA

MUNICIPAL GDPR AND EMPLOYMENT PERFORMANCE

Matzikama Municipality, located in the stunning Namaqualand region, is renowned for its stark desert landscapes, which come alive every spring with vibrant wildflower displays, drawing visitors from across the globe. This area, with its unique natural beauty, is also a thriving agricultural hub, thanks to a sophisticated system of canals linked to the Olifants River. The municipality's agriculture is diverse, producing a range of crops including vegetables, raisins, wine, table grapes, and processed fruits. The local farming sector is a key contributor to the region's economy, supported by both irrigation farming and the burgeoning aquaculture industry, with abalone farming along the Matzikama coast at Doringbaai gaining prominence.

In addition to agriculture, agri-tourism is becoming an increasingly important sector in Matzikama, driven by growing interest in the local wine culture and the annual wildflower season. Vredendal, the largest town and commercial centre of the municipality, serves as a key stop for tourists exploring the Namaqualand flower routes, making it a vital economic node. Lutzville, situated between the Olifants River and the Atlantic Ocean, is known for its vineyards, producing high-quality table grapes and wine. Klaver is celebrated for its community spirit and its award-winning wines from the Klaver Wine Cellars, attracting both locals and tourists. Finally, Vanrhynsdorp, set against the backdrop of the Gifberg mountains, is famous for its diverse succulent gardens and serves as the gateway to the northern reaches of Namaqualand, further supporting the region's growing tourism sector.

Municipal GDPR & employment performance



Top Five Jobs

	Growing of grapes	1 955
	Mixed farming	886
	General public administration at Local Government levels	580
	Manufacture of wines	493
	Growing of vegetables and melons, roots and tubers	446

Matzikama continues to leverage its natural resources, with agriculture standing out as the most significant economic sector. The municipal area's economy is heavily driven by perennial crop production, particularly grape farming, which remains the leading formal employer in the area, although raisin and wine production make up further significant shares of economic activity.²⁶ Additionally, abalone farming in coastal areas such as Doringbaai is expanding, adding a new dimension to the primary sector's growth. The growth of the tertiary sector is driven by agri-tourism, as Matzikama attracts tourists for its wine culture and seasonal wildflower displays.

Employment in Matzikama comprises predominantly of low-skilled and semi-skilled jobs, reflecting the labour-intensive nature of the agriculture sector. Low-skilled workers make up 52.7 per cent of the workforce, employed mostly in farming activities. Semi-skilled workers represent 31.4 per cent of the workforce, with jobs in trade, manufacturing, and transport. Over the past decade, there has been a noticeable shift towards more semi-skilled jobs, particularly in response to the urbanisation of the region and the diversification of its economy. Skilled workers, comprising 15.9 per cent of the workforce, are concentrated in management, technical, and service-oriented roles in sectors like finance, business services, and tourism.

Matzikama's economy has a notable agriculture, forestry, and fishing sector, contributing 28.1 per cent towards economic activity. The agricultural sector is closely linked to the manufacturing sector, which is a key driver at 13.2 per cent. Winemaking is the principal manufacturing activity in the Matzikama municipal area. Furthermore, the processing of locally mined mineral sands and structural metal products by companies such as D & E Group and Transcape Steels makes notable contributions.

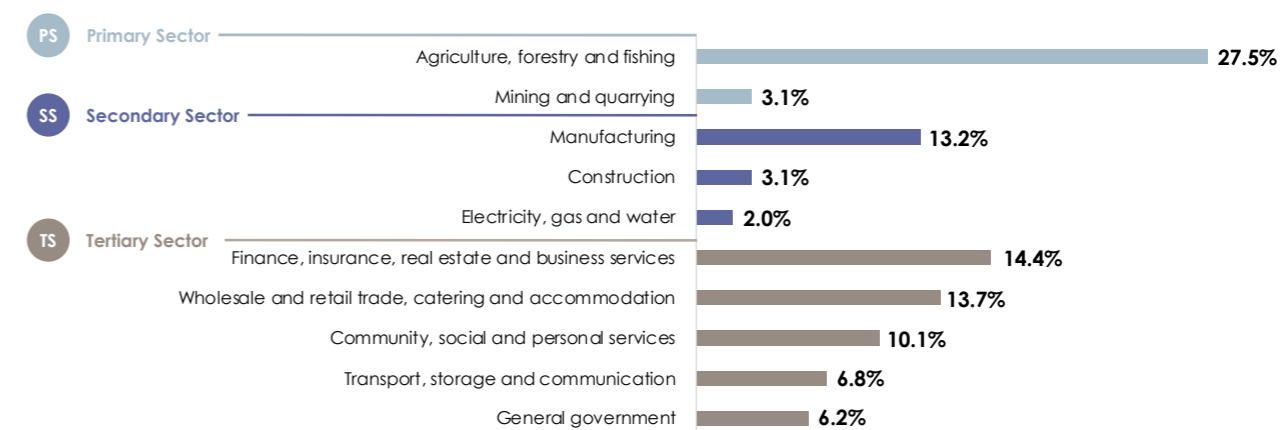
The mining and quarrying contribute 3.3 per cent. Local operators Tronox and Mineral Sands Resources extract minerals such as zircon, ilmenite, rutile, magnetite, and garnet from coastal dunes. These commodities are used to produce titanium dioxide pigment, which has various end uses, including the production of coatings and plastics. It is becoming increasingly more important for the mining companies in the municipal area to investment in sustainable extractive processes to safeguard the ecosystem and biodiversity of the WCD.

The finance, insurance, real estate, and business services sector contributes 14.4 per cent, while the wholesale and retail trade, catering, and accommodation contributing 13.8 per cent, and community, social, and personal services adding 9.8 per cent. These sectors are primed to support the demand that is stimulated through the primary and secondary industries in the area. Furthermore, urbanisation, particularly in towns like Vredendal, is boosting consumer spending, benefiting the retail sector and increasing the demand for business services such as insurance providers.

Construction at 3.2 per cent due to ongoing industrial and development activities. The electricity, gas, and water sector, though smaller at 2.2 per cent, remains vital for supporting economic activities. The general government sector contributes 6.5 per cent, reflecting the role of public administration, while transport, storage, and communication adds 6.8 per cent in service of the manufacturing and mining activities. Overall, Matzikama's economic makeup is characterized by a strong agricultural base, significant trade and services, and notable industrial activities, making it a well-rounded and multifaceted economy.

26 Western Cape Government, 2024

Figure 32
GDPR SECTORAL CONTRIBUTIONS IN CONSTANT 2015 PRICES, Matzikama, 2023



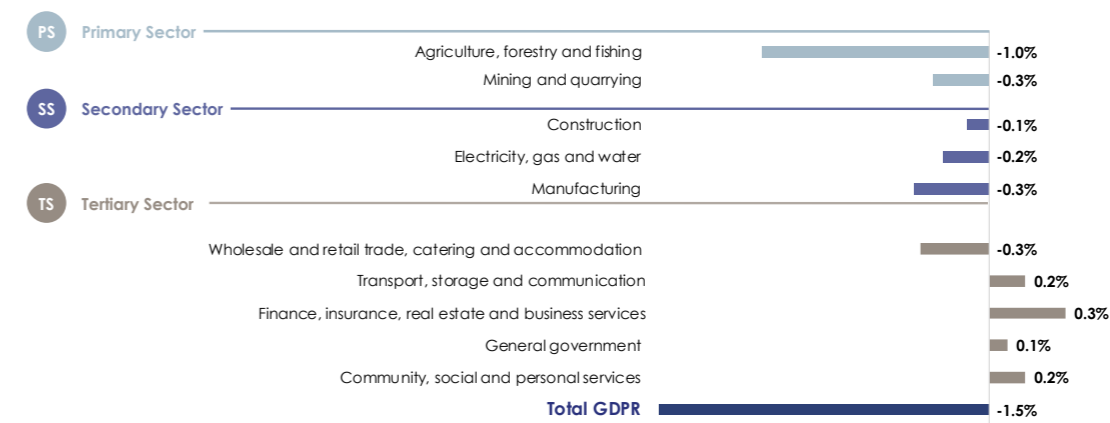
Source: Quantec, 2024

Matzikama experienced a contraction in economic activity between 2022 and 2023, with total GDP declining by 1.5 per cent. The agriculture, forestry, and fishing sector recorded a notable negative growth contribution of 1 per cent, reflecting continued vulnerabilities linked to climate-related risks that have affected agricultural output. Similarly, wholesale and retail trade, catering and accommodation, and manufacturing all saw modest declines in GDP growth, with contributions to reductions in GDP of 0.3 percentage points each.

The transport, storage and communication and finance, insurance, real estate and business services sectors, contrastingly, contributed positively to economic performance, accruing 0.2 and 0.3 percentage points, respectively, to GDP. Coupled with positive outcomes in the general government and community services sectors, the overall negative growth rate experienced by the municipality area fared better than otherwise would have been expected given such a difficult agricultural year for producers, and fiscal year for consumers.

Overall, though, an aggregate suite of sectoral declines emphasises the need for strategic interventions to stabilise and diversify the municipality's local economy.

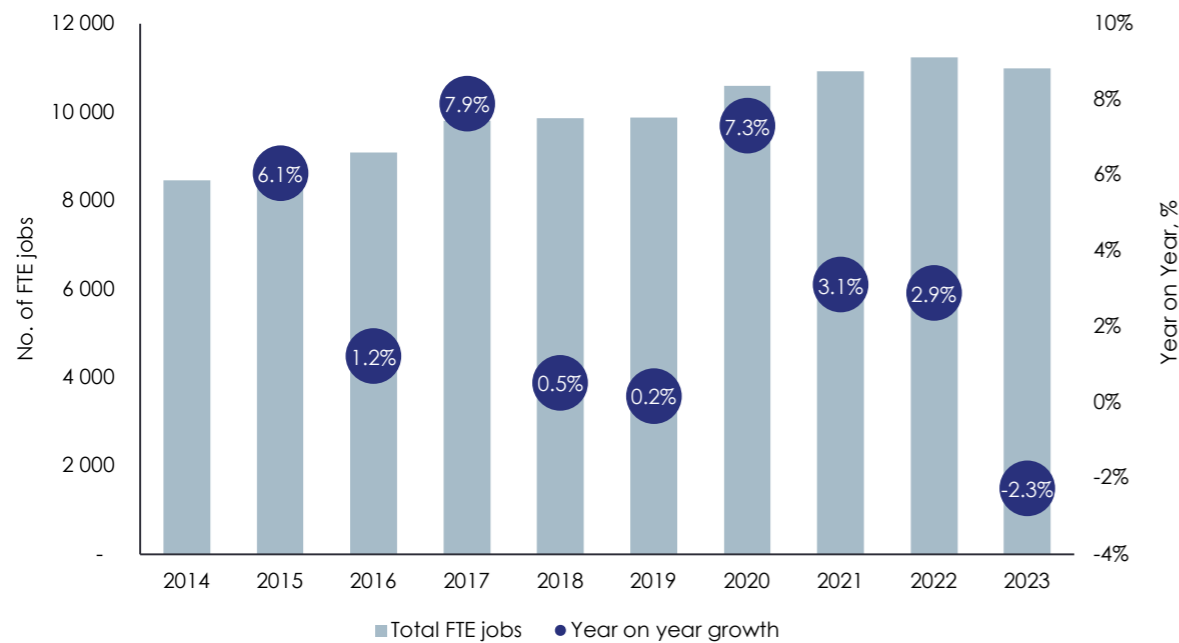
Figure 33
SECTORAL CONTRIBUTIONS TO GDP GROWTH, Matzikama, 2023



Source: Quantec, 2024

The economic performance of the Matzikama municipal area in 2023 reflects both resilience and challenges across key sectors. A contraction in GDP by 1.5 per cent led to a decrease in aggregate employment by 2.3 per cent in 2023, marking a reduction to just under 11 000 FTE jobs, down from the peak of 11 244 in 2022. Despite this decline, the municipality's employment levels remain higher than those in 2020, showing recovery from the economic disruptions caused by the COVID-19 pandemic. Agriculture remains the largest sector by employment, particularly grape farming and abalone farming in towns like Doringbaai, which continues to be vital for the local economy.

Figure 34
FULL-TIME EQUIVALENT JOBS AND GROWTH, Matzikama, 2014 - 2023²⁷



Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

²⁷ The reporting of the data has changed; town-level data is no longer available. The new method will report FTE figures at the municipal level

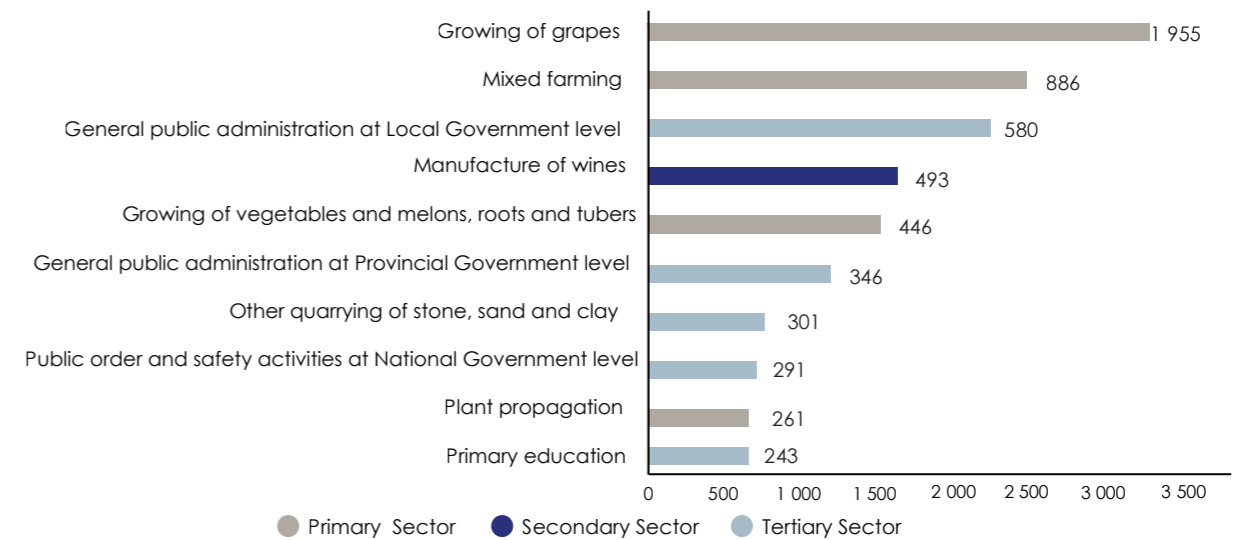


The agricultural sector's role in Matzikama's economy is significant, with perennial crop production, particularly grape farming, being the top formal employer. Although agriculture faces ongoing challenges, it continues to be a pillar of employment in the region, contributing to the diverse economic structure of the municipality municipal area. The year-on-year growth in agricultural employment is not as strong as in previous years, but it still represents a steady source of income and livelihood for many in Matzikama. This is further supported by the presence of Doring Bay Abalone, a major local employer that is community-owned and central to the town's economy. Despite challenges such as droughts, fluctuating global market demands, and the ongoing need for improved infrastructure, agriculture and related industries in Matzikama remain essential to the region's economic framework and employment structure.²⁸

The sector's prominence is further underscored by its role as the largest formal employer in the region, particularly in perennial crop production, with grape farming being the main activity. In total, agriculture provided 2 373 jobs in the region, reflecting its central role in sustaining local livelihoods. In addition to agriculture, the trade and manufacturing sectors also play key roles in the local economy. The region also benefits from the processing of locally mined mineral sands and the production of structural metal products, driven by companies like D & E Group and Transcape Steels, which provide significant employment. Public administration continues to be an important employer in Matzikama, with 1 087 formal jobs in local government.

These sectors, alongside agriculture, form the backbone of Matzikama's economy, ensuring a diversified economic structure that supports both urban and rural communities.

Figure 35
TOP 10 SECTORS BY NUMBER OF FTE JOBS, Matzikama, 2023



Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

The jobs analysis reveals that while certain sectors are expanding and creating employment opportunities, others are facing difficulties that result in job losses. Between 2022 and 2023, a total of 725 jobs were gained, while 979 jobs were lost, resulting in a net employment loss of 254 jobs.











²⁸ Western Cape Government, 2024; Wegro, 2024

The primary sector, particularly in mixed farming and the growing of vegetables, experienced notable job gains. These sectors saw increases of 103 jobs in mixed farming and 84 jobs in vegetable, melon, and tuber production. The secondary sector also showed positive trends, with job gains in the processing and preserving of fruit and vegetables (33 jobs) and the manufacture of wines (33 jobs). Additionally, the tertiary sector contributed to job growth, with wholesale trade in foodstuffs gaining 29 jobs, reflecting positive developments in local commerce.

Conversely, the primary sector, especially in the growing of grapes and citrus fruits, faced significant job losses, notwithstanding its importance to the local labour market. The growing of grapes saw a relatively large decline of 306 jobs, while citrus fruit farming shed 42 jobs. The tertiary sector also experienced reductions, particularly in freight transport by road (83 jobs lost), technical and vocational secondary education (56 jobs lost), and the renting of office machinery and equipment (39 jobs lost). These reductions highlight some of the challenges facing the area's service-oriented industries and educational sectors.

Challenges such as limited land availability, insufficient opportunities for small, micro, and medium-sized enterprises (SMMEs), bureaucratic red tape, the high cost of doing business, and a mismatch between the skills available in the workforce and the skills required by employers dampen the opportunities for new businesses to invest and create jobs.²⁹

Figure 36
TOP FIVE SECTORS FOR JOB CREATION AND JOB LOSSES, Matzikama, 2022-2023

Total job Gains (725)		Total job Losses (-979)	
 Mixed farming	103	 Growing of grapes	-306
 Growing of pome fruits and stone fruits	84	 Freight transport by road	-83
 Processing and preserving of fruit and vegetables	33	 Technical and vocational secondary education	-56
 Manufacture of wines	33	 Growing of citrus fruits	-42
 Wholesale trade in foodstuffs	29	 Renting of office machinery and equipment	-39

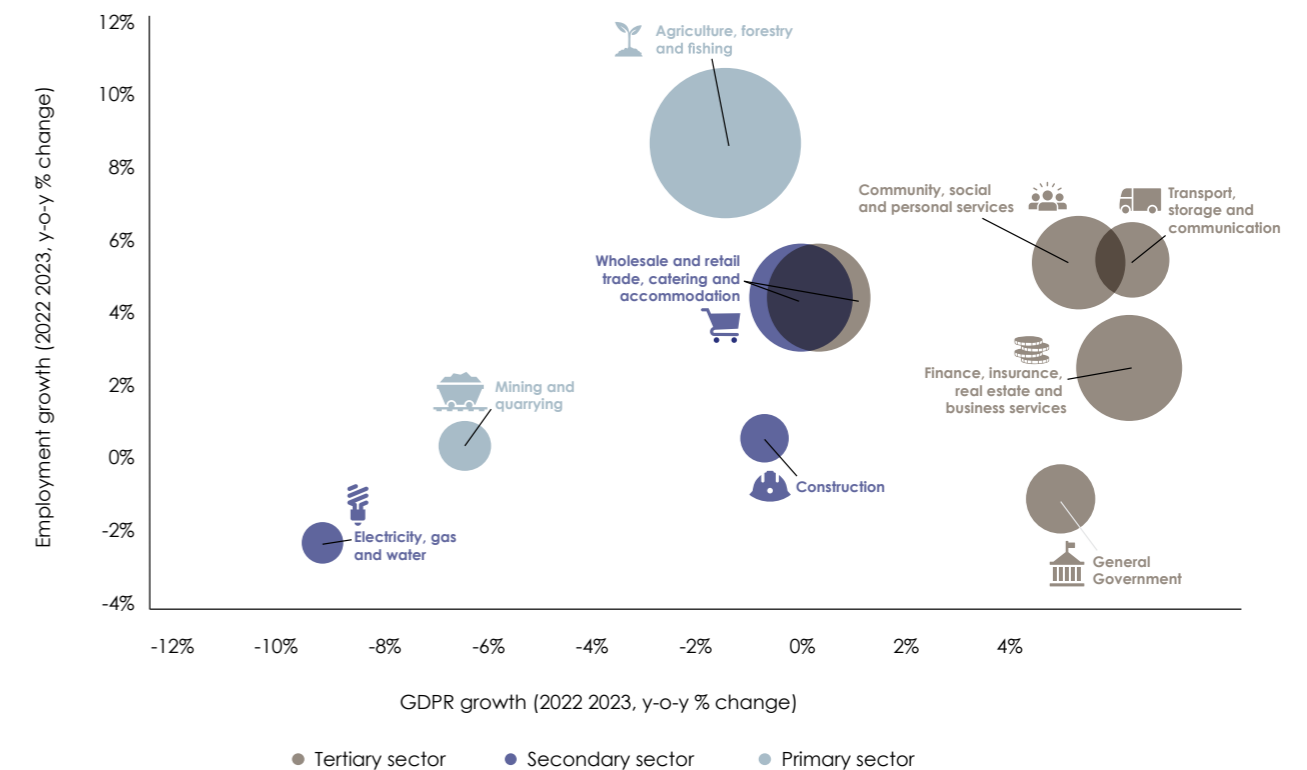
Source: Nell, A & Visagie, J. *Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024*

The analysis of GDP and employment performance together in Matzikama for 2023 reveals a muted economic picture. While high-value sectors such as finance, insurance, real estate, and business services saw positive GDP growth, they did not generate significant employment, with only a modest increase in jobs. Similarly, the transport, storage, and communication sector contributed to GDP growth and saw a rise in employment, underscoring its vital support role for agriculture and manufacturing.

29 (Wegro, 2024)

Agriculture, the backbone of Matzikama's economy, experienced a decline in GDP but contributed to an employment in agriculture, particularly in grape farming and abalone production, rose by 9.2 per cent, highlighting its resilience as a major source of jobs. Overall, Matzikama's economy is marked by a reliance on both high-value and labour-intensive sectors. While the tertiary sector contributes to GDP growth, it lags in job creation. The primary sector, particularly agriculture, remains crucial for employment but faces headwinds adversely affecting its growth prospects.

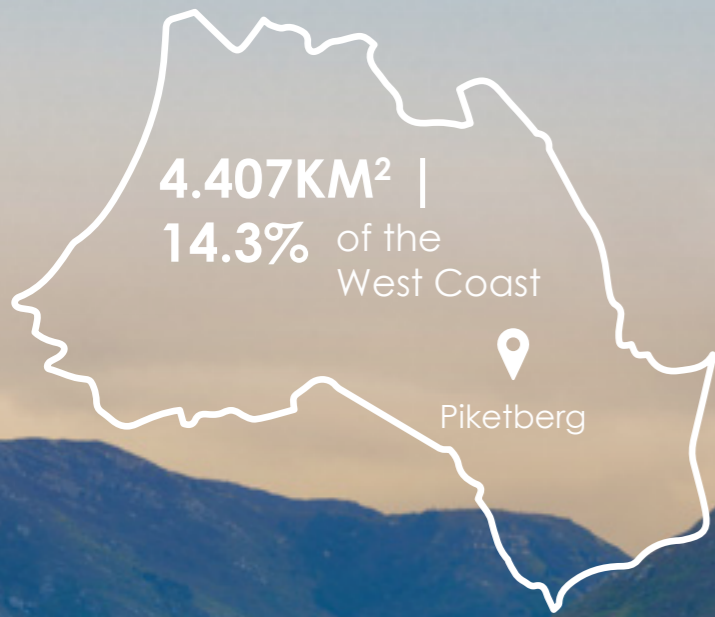
Figure 37
GDP³⁰ PERFORMANCE PER SECTOR, Matzikama, 2022-2023



Source: Quantec, 2024

30 See Note 1.

Municipal GDPR & employment performance

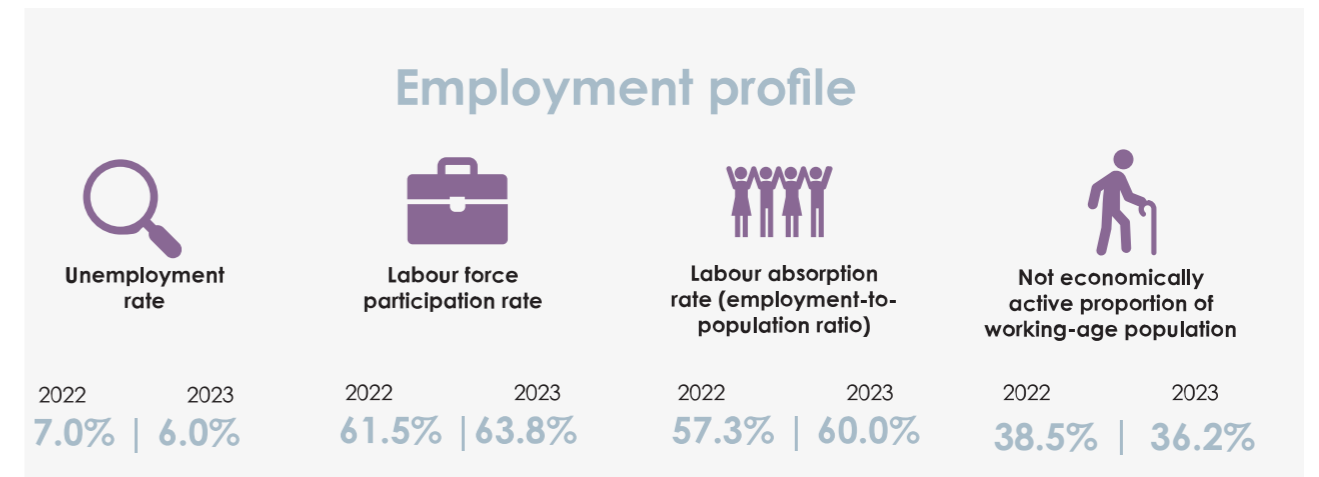
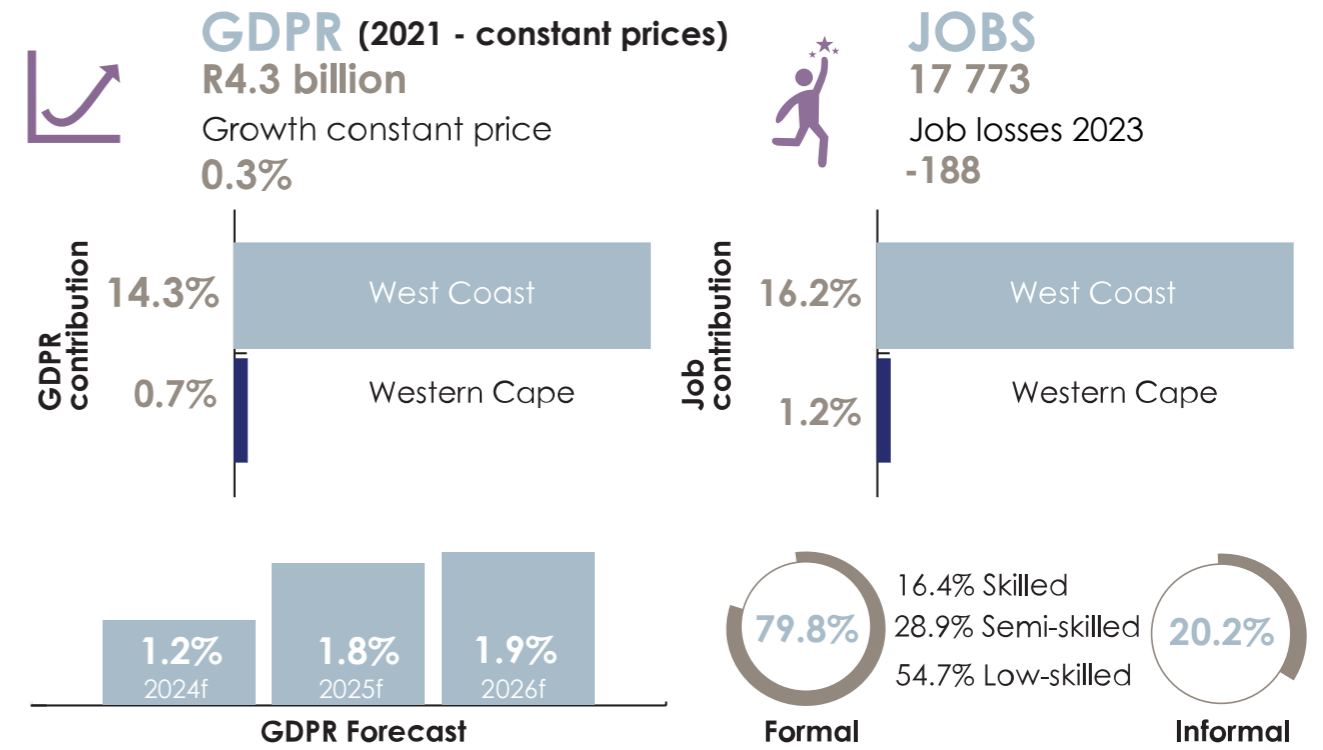


BERGRIVIER

MUNICIPAL GDPR AND EMPLOYMENT PERFORMANCE

The Bergrivier Municipal Area is defined by the scenic confluence of the Berg River and the Atlantic Ocean, creating a stunning estuarine ecosystem rich in biodiversity. This area, known for its abundant birdlife, has become a haven for nature lovers and birdwatchers alike. The municipal area is home to several charming towns, each offering a unique appeal. Velddrif, a quaint fishing village, is famous for its calm waterways, where boat trips along the estuary allow visitors to experience the region's tranquil beauty.

Port Owen, a picturesque marina town, attracts yachting and water sports enthusiasts with its serene waterfront lifestyle. Inland, Piketberg and Porterville are nestled among expansive wheatfields, vineyards, and orchards, serving as agricultural hubs with a rich cultural history. These towns provide significant employment opportunities in farming, particularly in fruit cultivation and wine production. The surrounding smaller communities, such as Aurora, Eendekuil, Goedverwacht, and Redelinghuys—locally known as the potato capital of the Sandveld—also contribute to the agricultural strength of the area, supporting both farming and services for the broader region.



Top Five Jobs

	Growing of grapes	4 380
	Motion picture, video and television programme production activities	1 793
	Mixed farming	1 233
	Growing of citrus fruits	1 193
	Growing of vegetables and melons, roots and tubers	971

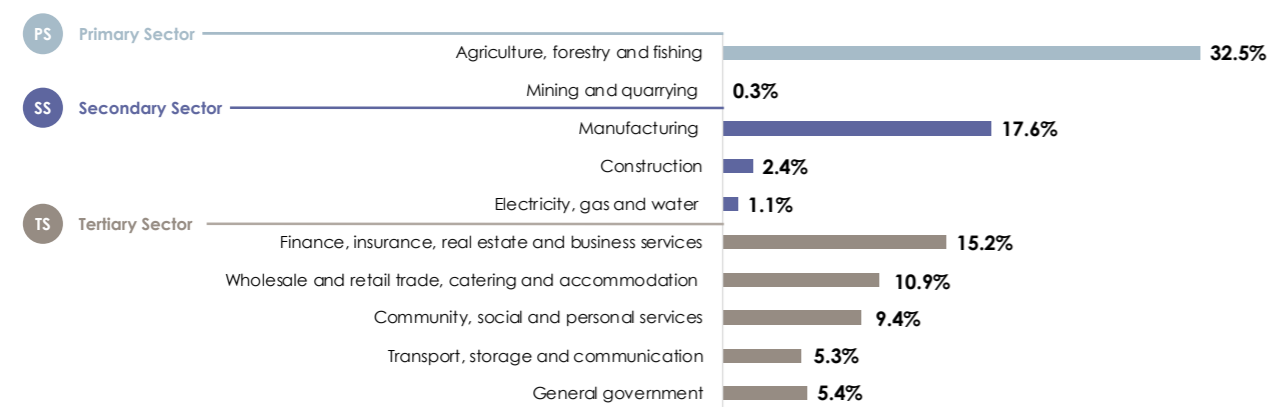
The Bergrivier economy is a significant contributor to the economic output of the WCD, contributing 14.5 per cent to the District's GDP in 2023, which amounts to R4.3 billion. The municipal area also accounted for 16.2 per cent of total employment, accounting for 29 594 jobs. Agriculture - particularly fruit farming, livestock rearing and aquaculture, and processing related to canning fish and fish-meal - remain key sectors, employing many low-skilled workers, while semi-skilled workers are more prevalent in services such as finance, retail, and transport.

A notable portion of the workforce in Bergrivier is employed as low-skilled (54.7 per cent) and semi-skilled (28.9 per cent) labour, reflecting the region's strong reliance on agricultural and aquacultural production and processing, as well as services. The growth of semi-skilled jobs in recent years mirrors a broader trend of industrial diversification in response to rising demand for services and infrastructure. Skilled workers account for 16.4 per cent of the workforce, with a growing presence in sectors such as finance, manufacturing, and government services, reflecting an increasing need for more qualified professionals as the local economy expands and diversifies.

In Bergrivier, the agriculture, forestry, and fishing sector is the largest contributor to GDP, making up 33.9 per cent of the local economy, while the manufacturing sector contributes 16.5 per cent. The agriculture and processing value chain, which includes fishing, aquaculture, and associated processing activities, are the main economic activities in Velddrif. Most other towns, particularly Piketberg and Porterville, are sustained by farming activities

The manufacturing sector, contributing 16.5 per cent, and the construction sector, at 2.4 per cent, play vital roles in supporting the region's infrastructure and industrial growth. The tertiary sector, led by finance, insurance, real estate, and business services, contributes 14.8 per cent, while wholesale and retail trade contribute 11.2 per cent, both pivotal in supporting local economic activity. Despite slight negative growth contributions from agriculture and mining, Bergrivier's economy remains diverse, with sectors like manufacturing and services driving ongoing economic development and employment growth

Figure 38
GDP SECTORAL CONTRIBUTIONS IN CONSTANT 2015 PRICES, Bergrivier, 2023

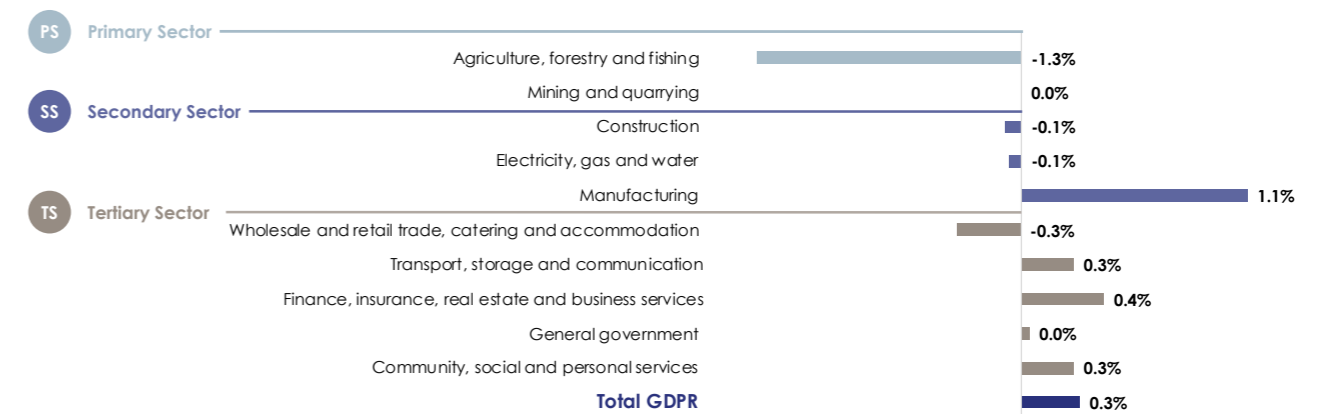


Source: Quantec, 2024

The economic diversity of the Bergrivier municipal area is evident when examining the contributions of different sectors to its total GDP growth of 0.3 per cent in 2023. In particular, the resilience of Bergrivier's manufacturing sector stood out as the sector contributed positively to growth by 1.1 percentage points. Coupled with positive contributions from the transport, finance, and community services sectors, the degree of sectoral diversification was sufficient in the municipal area to stave off an economic decline in aggregate GDP.

However, some sectors adversely contributed to municipal economic growth. Agriculture, forestry, and fishing made the most significant negative contribution (erasing 1.3 percentage points of GDP growth), with the wholesale sector also contributing negatively to growth by only a fraction of the effect. These negative contributions came about as a result of challenges associated with climate resilience within the municipal area, along with the macroeconomic constraints placed on consumers throughout 2023.

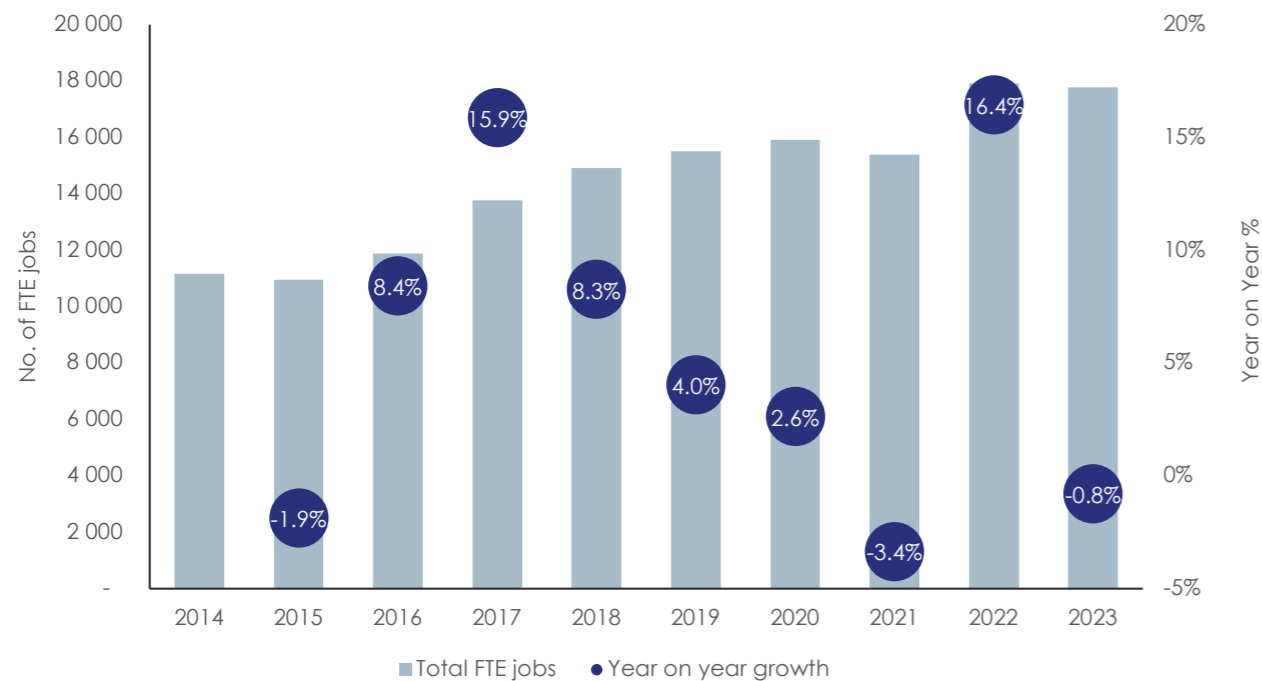
Figure 39
SECTORAL CONTRIBUTIONS TO GDP GROWTH, Bergrivier, 2023



Source: Quantec, 2024

Bergrivier's employment landscape for 2023 reflects a modest decline in total jobs, with the region recording a 0.8 per cent year-on-year decrease. The total number of jobs stood at 17 773 in 2023, slightly down from 17 918 in 2022. However, despite the slight contraction, the municipality's employment levels have shown overall resilience, particularly when compared to the pandemic-driven downturn in 2020, when jobs fell to 15 922. This demonstrates recovery in the region's labour market, with the job count having increased by 16.4 per cent in 2021 as the economy rebounded.

Figure 40
FULL-TIME EQUIVALENT JOBS AND GROWTH, Bergrivier , 2023³¹



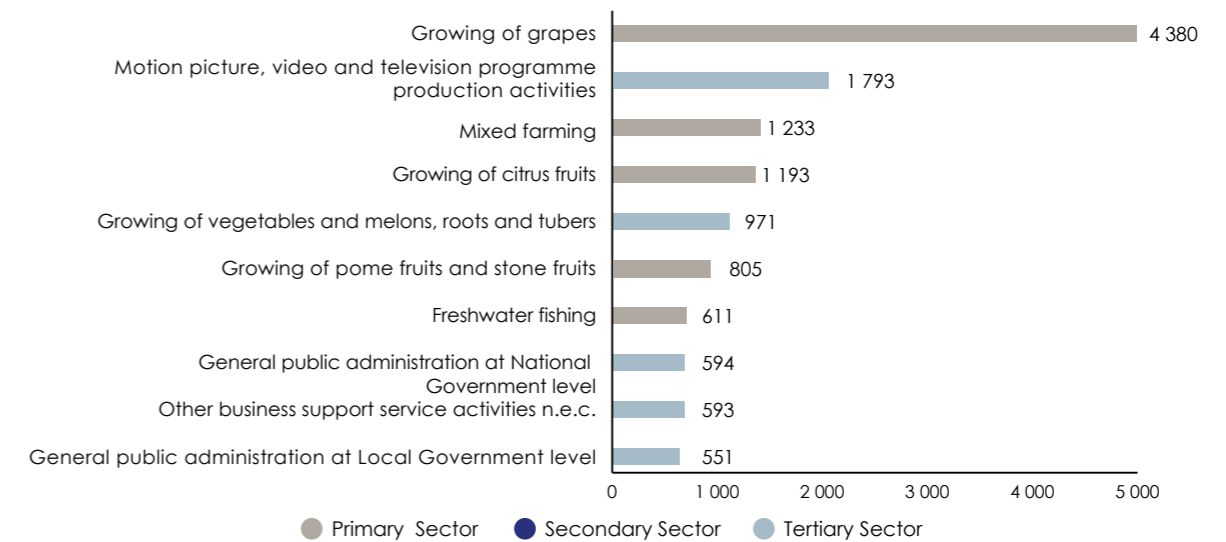
Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

In terms of sectoral contributions, the most notable employment gains in recent years were seen in the tertiary sector, while agriculture and manufacturing sectors faced more volatility, with fluctuating GDP growth not always aligned with job creation.

In particular, the agriculture sector remained an important source of new work opportunities in 2023. Jobs were created through activities such as perennial and non-perennial crop production, as well as in agricultural support and post-harvest activities.³² These areas of agricultural growth helped mitigate the overall job losses across other sectors. Formal job losses were recorded across various sectors, particularly within services, reflecting ongoing challenges in industries like wholesale and retail trade, catering, and accommodation. These losses, however, were partly offset by the job creation in agriculture.

The employment landscape in Bergrivier highlights the importance of agriculture and public services in supporting the local economy. The District's reliance on agriculture for job creation, particularly in crops like grapes, citrus fruits, and vegetables, is clear, even as high-value sectors like finance and business services drive GDP growth. To ensure sustainable economic development, strategic investments in both agricultural productivity and the growth of high-value sectors are essential. Such efforts will foster a more diversified economy that not only drives growth but also creates meaningful employment opportunities for the local population.

Figure 41
TOP 10 SECTORS BY NUMBER OF FTE JOBS, Bergrivier, 2023



Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

The jobs analysis for Bergrivier between 2022 and 2023 indicates that 1 456 jobs were created, while 1 644 jobs were lost, resulting in a net employment loss of 188 jobs. Despite this, the tertiary sector played a vital role in job creation, with motion picture, video, and television programme production leading the charge, contributing 509 jobs. Other business support services (395 jobs) and retail activities (43 jobs) also showed positive growth, reflecting expansion in the services and retail industries. These sectors, driven by the growing demand for media and support services, along with retail sales, demonstrated resilience amid broader economic challenges.











On the other hand, the primary sector bore the brunt of job losses, particularly in agriculture. The growing of grapes and citrus fruits saw the largest reductions, with 934 and 559 jobs lost, respectively. Additionally, mixed farming (28 jobs) and freshwater fishing (53 jobs) also recorded job losses, reflecting the ongoing challenges facing agriculture in the region. These declines emphasise the vulnerabilities of the agricultural sector, which remains highly susceptible to factors such as climate variability, market fluctuations, and access to resources.

The secondary sector, particularly in construction, also experienced a modest decline in job numbers, with 70 jobs lost in road and railway construction. Despite these setbacks, the overall growth in the tertiary sector partly offset the losses in primary and secondary industries. However, challenges such as land availability, limited opportunities for small, micro, and medium-sized enterprises (SMMEs), bureaucratic red tape, the high cost of doing business, and a mismatch between available skills and employer needs continue to hinder broader job creation and investment opportunities. Addressing these issues is crucial for fostering a more balanced and sustainable employment environment in Bergrivier.

³¹ The reporting of the data has changed; town-level data is no longer available. The new method will report FTE figures at the municipal level

³² Western Cape Government

Figure 42
TOP FIVE SECTORS FOR JOB CREATION AND JOB LOSSES, Bergrivier, 2022-2023

Total job Gains (1 456)		Total job Losses (-1 644)	
 Motion picture, video and television programme production activities	509	 Growing of grapes	-934
 Growing of vegetables and melons, roots and tubers	419	 Growing of citrus fruits	-559
 Other business support service activities n.e.c.	395	 Construction of roads and railways	-70
 Growing of other tree and bush fruits and nuts	89	 Freshwater fishing	-53
 Retail sale in non-specialized stores with food, beverages or tobacco predominating	43	 Mixed farming	-28

Source: Nell, A & Visagie, J. *Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024*

The analysis of GDP and employment performance in Bergrivier for 2023 presents a dynamic and complex picture of the region's economic landscape.

High-value sectors, such as finance, insurance, real estate, and business services, continue to drive GDP growth, contributing 15.2 per cent to the local economy with a 2.7 per cent increase in GDP.

However, despite their robust economic output, these sectors did not significantly contribute to job creation, with employment growth in this sector recorded at just 3.4 per cent. In contrast, sectors like transport, storage, and communication, which grew by 5.2 per cent in GDP and 6.4 per cent in employment, played an essential role in supporting other industries, particularly agriculture and retail, underscoring the interconnected nature of Bergrivier's economy.

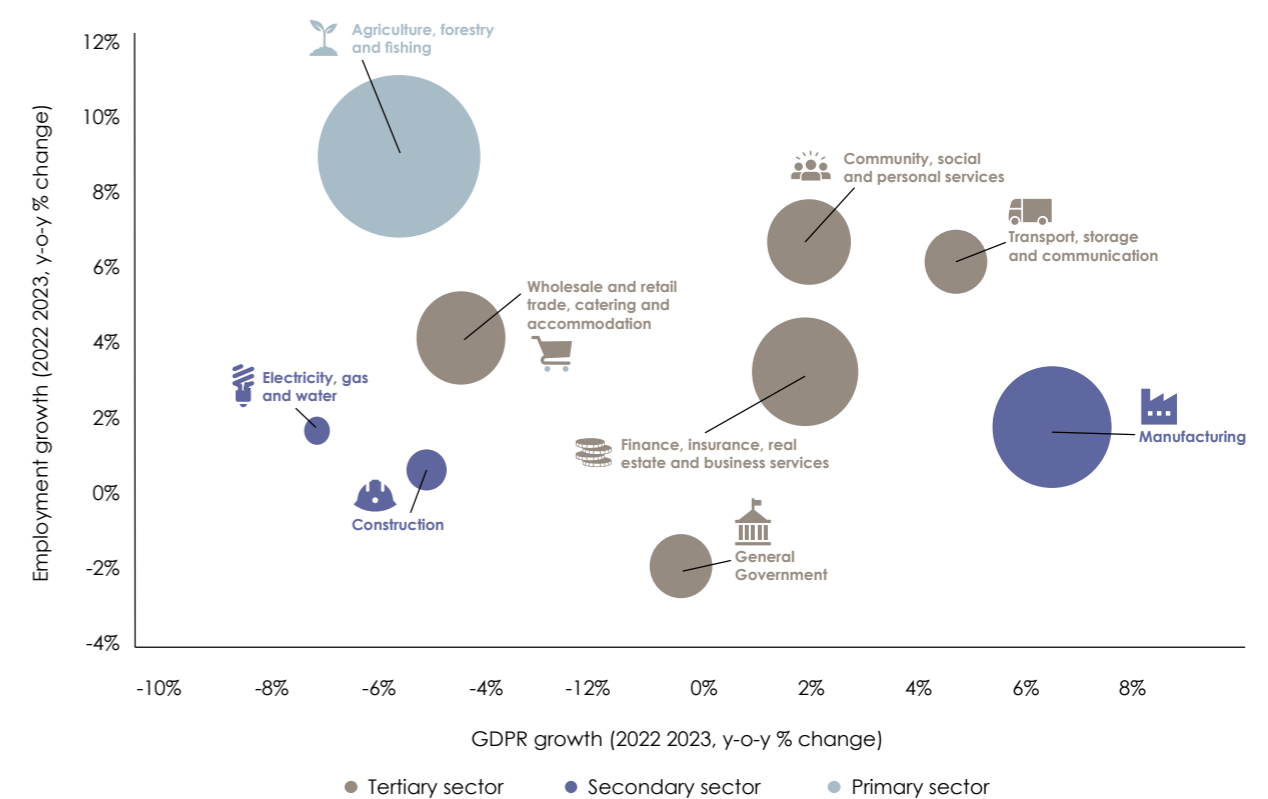
The primary sector, led by agriculture, remains the largest employer in Bergrivier, despite experiencing a 3.9 per cent contraction in GDP growth between 2022 and 2023. Agricultural activities, including fruit farming and mixed farming, accounted for a significant portion of employment, with 4 380 jobs in grape production, 1 193 jobs in citrus farming, and 1 233 jobs in mixed farming.

Despite the challenges faced by the agricultural sector, such as climate-related risks and market fluctuations, it continues to be a key source of employment, contributing 32.5 per cent to the local GDP. The region's reliance on agriculture highlights the need for investment in productivity and resilience in this sector to ensure sustainable job creation and long-term economic stability.

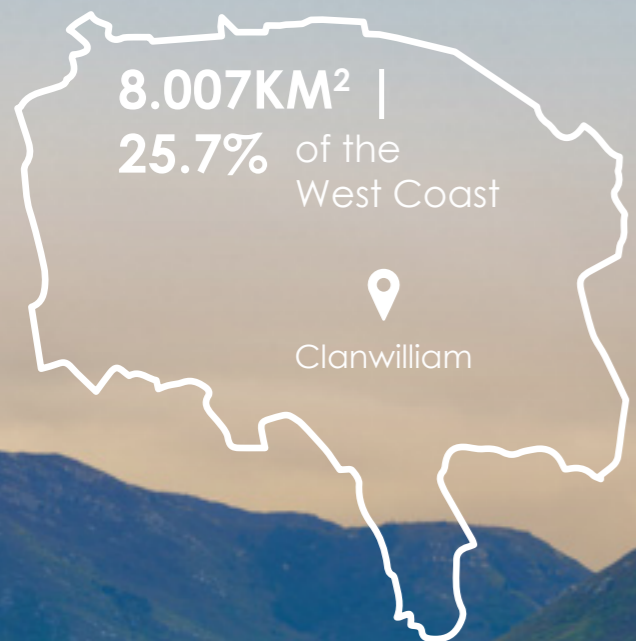
However, the Bergrivier economy also faces disparities between sectors that drive GDP growth and those that create jobs. While high-value sectors like finance and business services contributed significantly to GDP growth, these sectors absorb relatively few labour market participants, with limited growth in the number of jobs created. Conversely, the labour-intensive agriculture sector, although vital for employment, showed a decline in economic output, which underscores the challenges faced by the sector.

A holistic approach that fosters growth across both high-value and labour-intensive sectors, through strategic investments in infrastructure, skills development, and resilience, is essential for achieving balanced and sustainable economic development. By leveraging the strengths of both the primary and tertiary sectors, Bergrivier can ensure continued growth and job creation that benefits its entire population.

Figure 43
GDP PERFORMANCE PER SECTOR, Bergrivier, 2022-2023



Source: Quantec, 2024



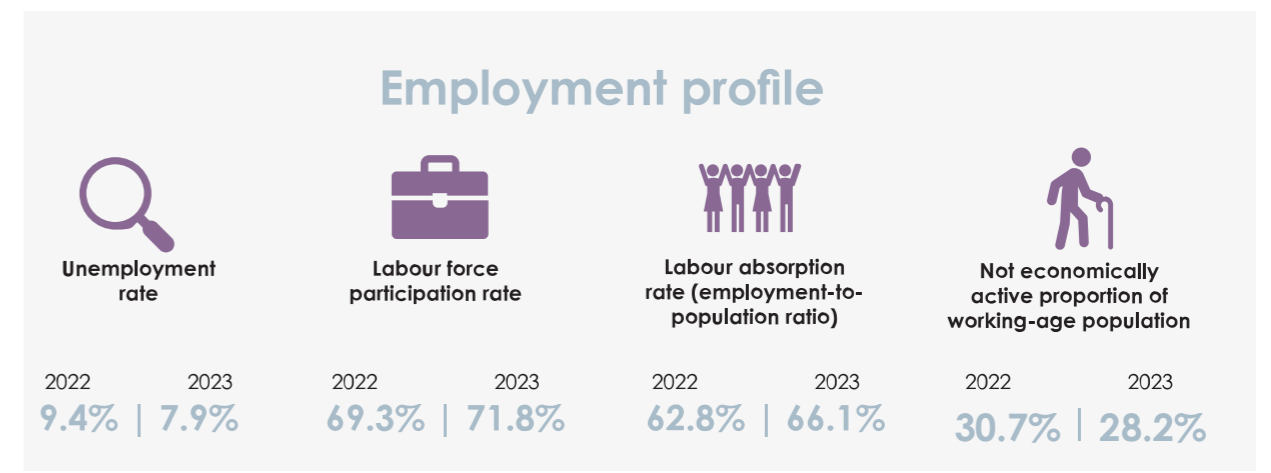
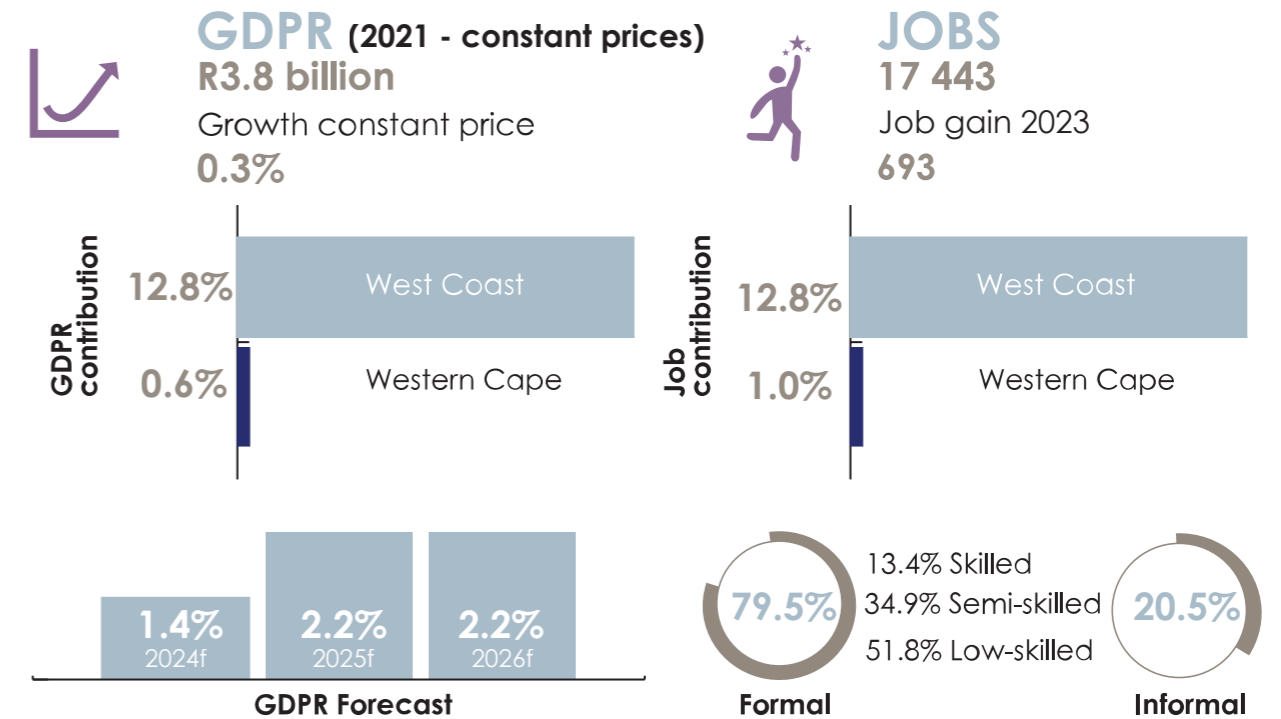
CEDERBERG

MUNICIPAL GDPR AND EMPLOYMENT PERFORMANCE

The Cederberg Municipality is renowned for its breathtaking landscapes, most notably the iconic Cederberg Wilderness Area, which is famous for its dramatic rock formations like the Wolfberg Arch and the Maltese Cross. These rugged terrains, often described as some of the most spectacular in South Africa, attract a wide range of outdoor enthusiasts, from hikers and rock climbers to nature lovers. The area's pristine beauty makes it a sought-after destination for eco-tourism and adventure tourism.

Clanwilliam, the largest town in the municipality, is a key gateway to the Cederberg mountains and is renowned for its stunning wildflower displays. The town is also home to the rare Clanwilliam cedar tree, which grows exclusively in the region, making it a significant ecological landmark. Clanwilliam Dam, an essential resource for local agriculture, provides water for surrounding farms, helping sustain the area's farming community. The nearby town of Citrusdal, surrounded by sprawling citrus orchards, is famous for producing high-quality citrus fruits, while Graafwater is home to the historic Heerenlogement cave, a resting place for travellers dating back to 1661. Additionally, Wupperthal, a picturesque village nestled in the mountains, is celebrated for its traditional thatched-roof houses, the production of rooibos tea, and its fine leather products, offering a unique blend of history and culture to visitors.

Municipal GDPR & employment performance



Top Five Jobs

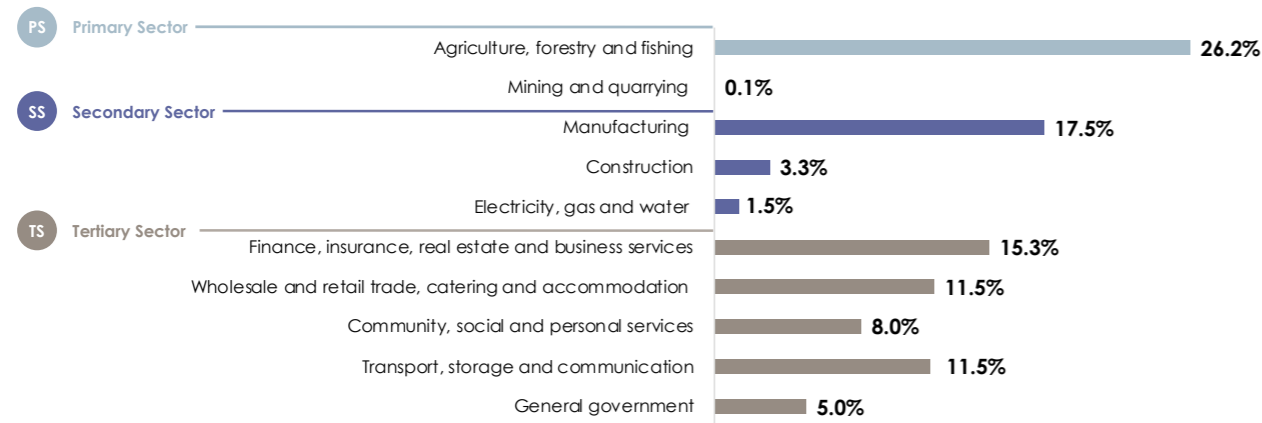
	Growing of citrus fruits	6 504
	Mixed farming	2 633
	Growing of vegetables and melons, roots and tubers	1 060
	Packaging activities	524
	Post-harvest crop activities	509

Cederberg has the smallest economy within the WCD, contributing 12.8 per cent to the GDP, totalling R3.8 billion in 2023. Despite being smaller in scale, the municipal area plays a critical role in the regional economy, particularly through agrarian and maritime activities. The economy benefits significantly from citrus production, with major local producers such as Goede Hoop Citrus, Mouton Citrus, and ALG Estates, and is among the most prolific growers of rooibos in the country. These activities drive the agriculture sector, making it a cornerstone of the local economy.

The municipal area is also integral to the region's export activities, with wholesalers and exporters like Everseason and Summer Citrus playing an essential role in the value chain. These exporters help facilitate the flow of citrus products to international markets, boosting the region's trade performance. In terms of employment, Cederberg accounts for 14.5 per cent of the District's workforce, providing 26 443 jobs. The local labour market is largely composed of low-skilled (51.8 per cent) and semi-skilled (34.9 per cent) workers. The share of skilled workers (13.4 per cent) is also significant, reflecting the increasing demand for expertise in agri-business, manufacturing, and the growing tourism sector.

The tertiary sector cumulatively accounts for 45.3 per cent of the municipality's GDP, with finance, insurance, real estate, and business services being the largest contributor, followed by wholesale and retail trade and transport. These service-based industries, along with the strong agricultural base, are increasingly important as the region diversifies its economic activities. The steady rise in the share of semi-skilled and skilled workers also signals a shift towards more value-adding, higher-skill sectors within the local economy.

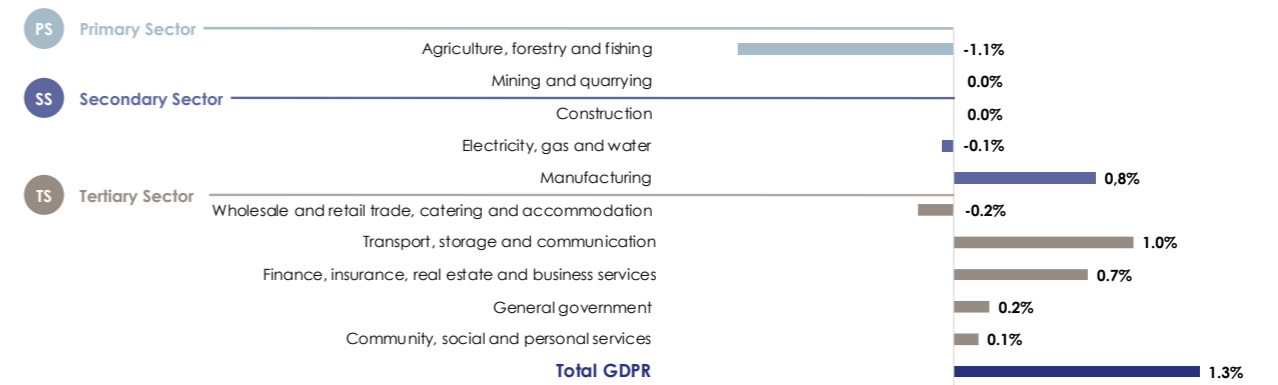
Figure 44
GDPR SECTORAL CONTRIBUTIONS IN CONSTANT 2015 PRICES, Cederberg, 2023



Source: Quantec, 2024

Cederberg experienced robust GDP growth of 1.3 per cent, driven by a mix of sectors. The largest contributors to this growth were the transport, finance, and manufacturing sectors of the Cederberg economy, contributing 1, and 0.8 percentage points to GDP growth respectively. However, along with the overarching trends across the WCD, agriculture and wholesale and retail trade sectors tended to fare the worst in 2023, contributing negatively to the GDP growth of Cederberg by 1.1 and 0.2 percentage points respectively. As before, this growth contribution is testament to the weather phenomena in 2023 decreasing yields, and the general constraint on consumers

Figure 45
SECTORAL CONTRIBUTIONS TO GDPR GROWTH, Cederberg, 2022-2023

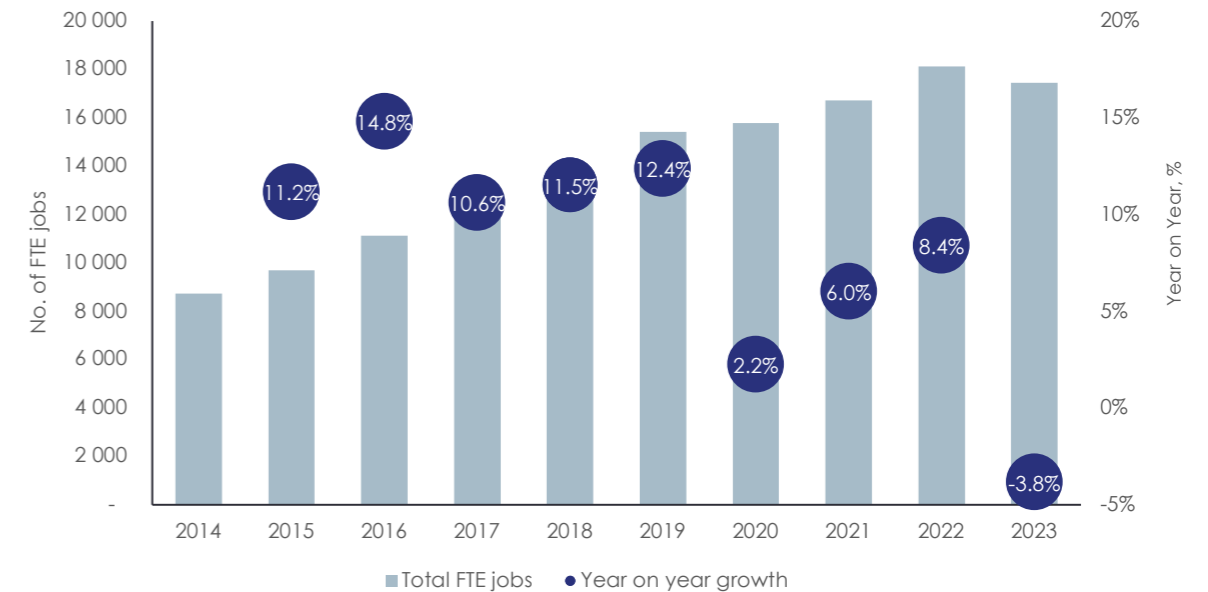


Source: Quantec, 2024

The GDP growth in Cederberg saw 1 633 jobs created across the labour market in 2023 alone. Of this, there were 889 jobs formal jobs and 780 jobs in the informal sector. This growth marks continued recovery post COVID-19. Furthermore, the positive trends in labour force participation (up by 2.5 percentage points) and labour absorption (3.3 percentage points) point to a decrease in both the economically inactive population and the number of unemployed (decreasing by 1.4 percentage points in 2023).

An analysis of the spatial tax data assesses the jobs growth based on the number of establishments in a region. Results from the data analysis shows that Cederberg, after being on an upward trajectory, lost 3.8 per cent of jobs.³³ As a result, Cederberg has just under 17 450 jobs. Notably, though, the municipal area now has more jobs than the pre-COVID period. The recent job losses seem to be the culmination of erratic climate conditions, dilapidated infrastructure (that results in lack of new investment), financial constraints and lack to access to the right skills in the area.

Figure 46
FULL-TIME EQUIVALENT JOBS AND GROWTH, Cederberg, 2023³⁴



Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

³³ The discrepancy in FTE job numbers might be explained by the head office effect.

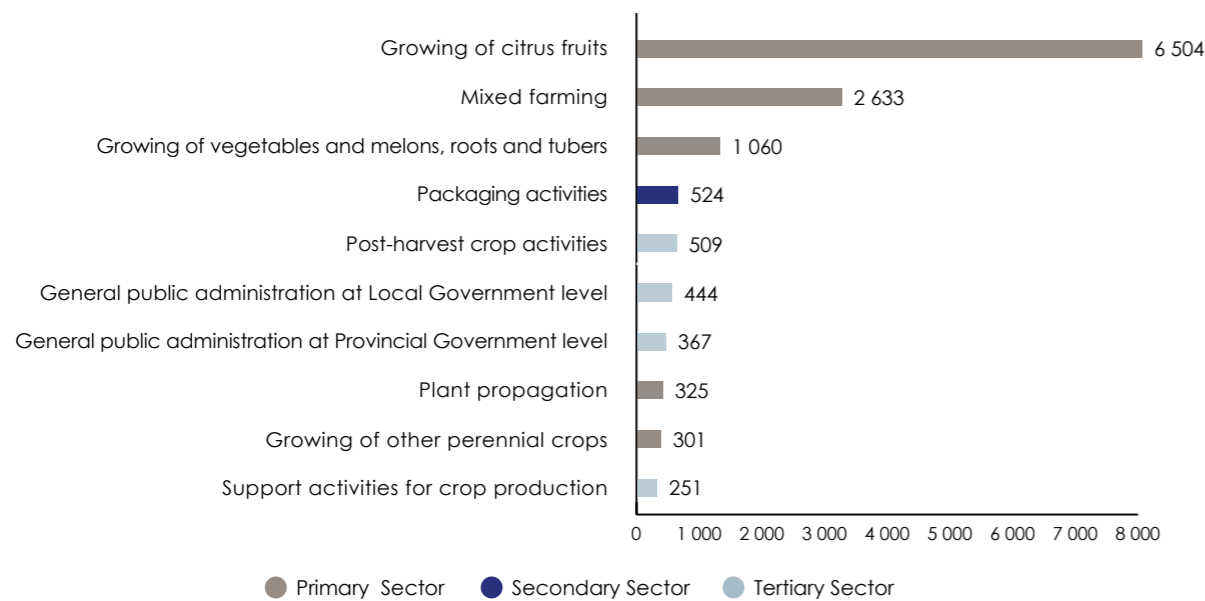
³⁴ The reporting of the data has changed; town-level data is no longer available. The new method will report FTE figures at the municipal level

Comparing the concentration of employment in Cederberg against the economic contributions, agriculture is labour-intensive in nature. It contributes 26.2 per cent to GDP but accounts for 42.6 per cent of employment. Conversely, the finance, insurance, real estate, and business services sector contributes a substantial 15.3 per cent to GDP but accounts for only a fraction of jobs (8.3 per cent of employment). Similarly, manufacturing activity holds 17.5 per cent of GDP with 8.8 per cent of employment.

This disparity indicates that while agriculture is essential for employment, sectors like finance and business services drive economic growth. Therefore, strategic investments in enhancing agricultural productivity and resilience, alongside fostering growth in high-value sectors, are crucial for balanced economic development and job creation.

Cederberg's jobs are mainly located within, or adjacent to the agriculture, forestry and fishing sector. Jobs are concentrated in agriculture, with cultivation of citrus employing 6 504 workers, followed by mixed farming with 2 633. General public administration at a local government level had a total 444 jobs. The reliance on agriculture highlights the region's economic strengths and the importance of both natural resource management in supporting the community.

Figure 47
TOP 10 OCCUPATIONS BY NUMBER OF FTE JOBS, Cederberg, 2023













Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

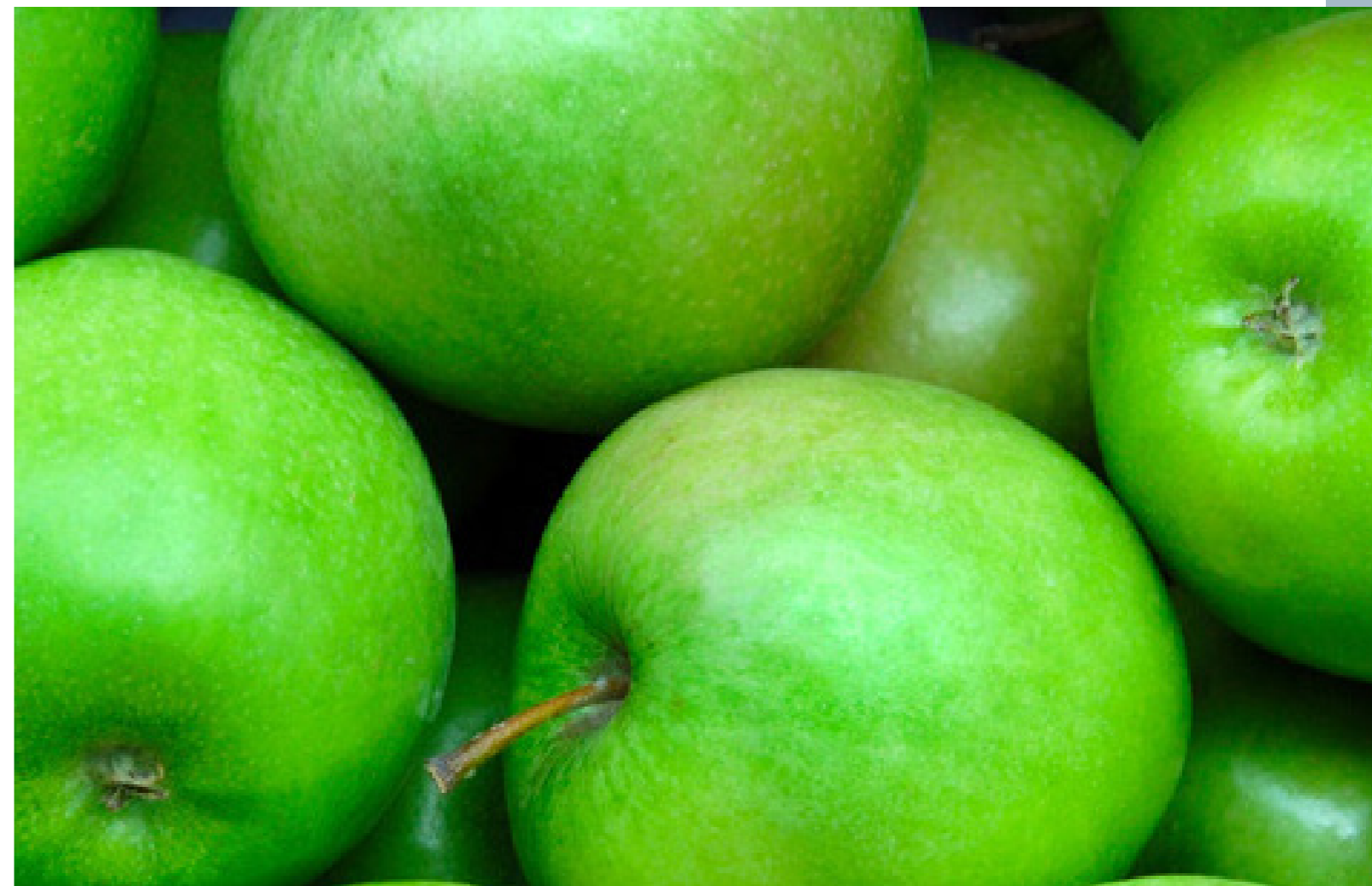
The jobs analysis reveals that while certain sectors are expanding and creating employment opportunities, others are facing difficulties that result in job losses. There was a total of 364 jobs gained, while 758 were lost, resulting in a net employment loss of 394 jobs when contrasting the top five sectors for job losses and job gains. The agriculture and ancillary activities dominated job gains of more than 280 jobs created out of a total 364. The tertiary sector, particularly in service care delivery, experienced notable job gains of 32.

Conversely, again, the agriculture sector faced significant job losses, highlighting the variation and specificities required for agricultural production. The tertiary sector also saw reductions in retail sale services as economic conditions weigh down on consumer spend. Challenges such as land availability, limited opportunities for SMMEs, red tape, the high cost of doing business, and a lack of suitably skilled workers dampen the opportunities for new businesses to invest and hire new staff.

Figure 48
TOP FIVE SECTORS FOR JOB CREATION AND JOB LOSSES, Cederberg, 2022-2023

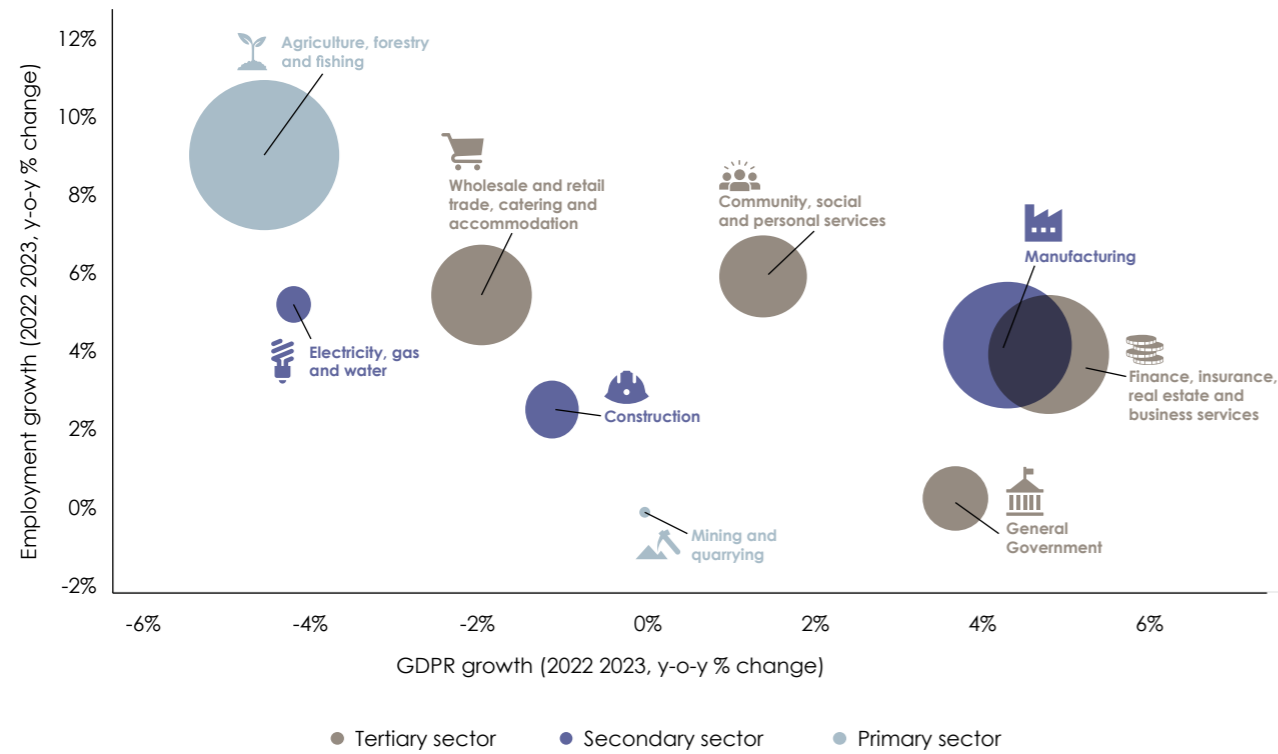
Total job Gains (364)		Total job Losses (-758)		
	Mixed farming	143	 Support activities for crop production	-318
	Growing of vegetables and melons, roots and tubers	106	 Retail sale in non-specialised stores with food, beverages or tobacco predominating	-177
	Post-harvest crop activities	52	 Plant propagation	-109
	Residential nursing care facilities	32	 Growing of grapes	-90
	Growing of other tree and bush fruits and nuts	31	 Residential care activities for the elderly and disabled	-64

Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024



The analysis of GDP and employment performance reveals a nuanced picture. While high-value sectors such as finance and business services are the primary drivers of GDP growth, they did not generate significant employment in 2023. At the same time, the transport, storage and communication sector provided critical ancillary services to the agriculture, manufacturing and retail sectors along with retail supporting activities at the Port of Cape Town. Conversely, labour-intensive sectors like agriculture provide substantial employment but face challenges that hinder their economic contribution. Addressing these disparities through investments in productivity, resilience, and diversification is essential for achieving balanced and sustainable economic growth. By fostering an environment that supports both high-value and labour-intensive sectors, Cederberg can ensure robust economic development that benefits all residents.

Figure 49
GDP³⁶ PERFORMANCE PER SECTOR, Cederberg, 2022-2023



Source: Quantec, 2024



35 See Note 1.

MUNICIPAL ECONOMIC OUTLOOK

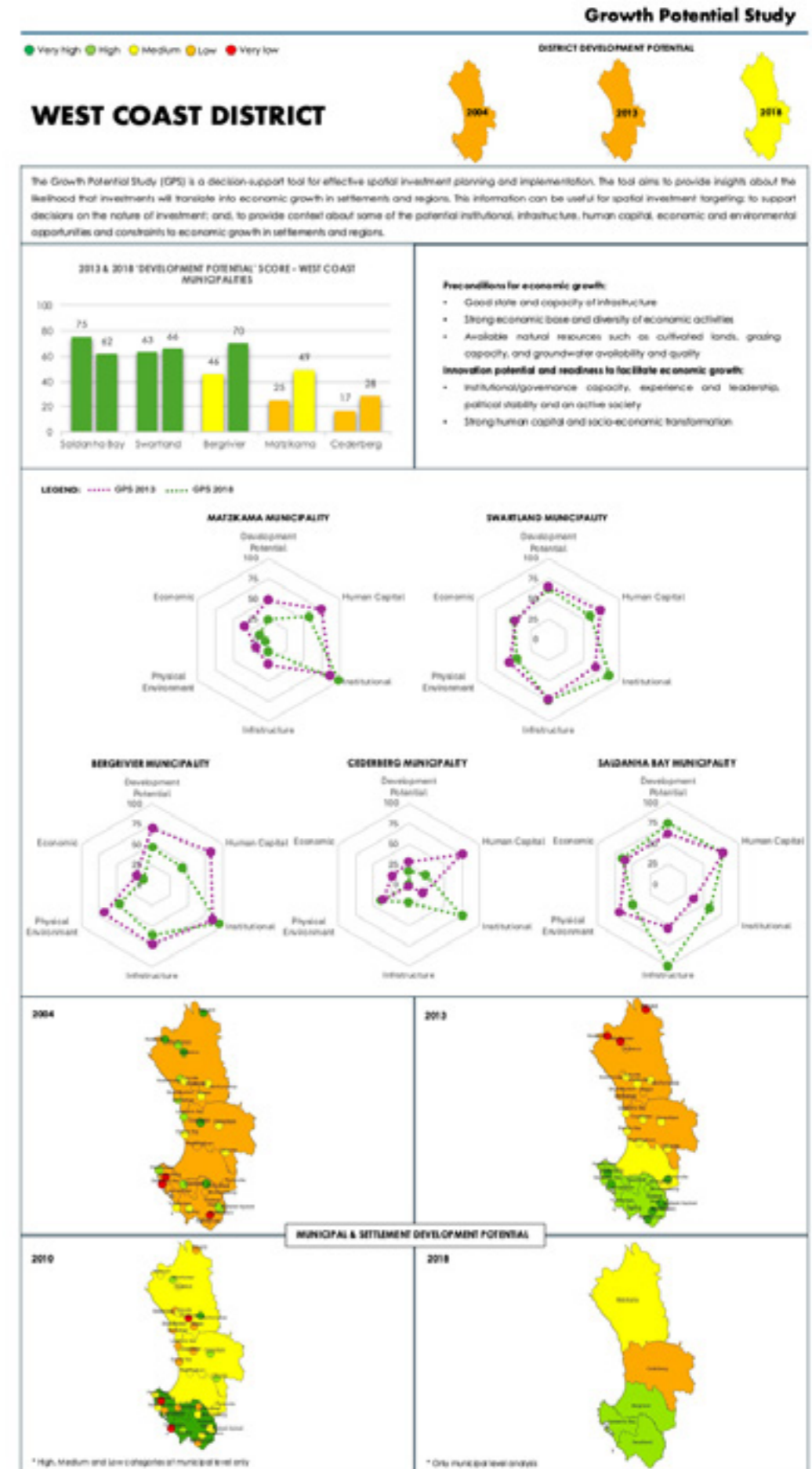
Saldanha Bay's economy is projected to grow by 0.2 per cent in 2024, with finance growing by 3.2 per cent and general government by 1.3 per cent. However, the mining and quarrying sector is projected to decline by 8.4 per cent, and the transport, storage, and communication sector is expected to decrease by 14.6 per cent, which could impact overall economic stability. The construction sector is also expected to decline by 3.3 per cent. In 2025, the overall economic growth is expected to remain stable at 1.4 per cent, with finance growing by 2.9 per cent and mining declining by 8.2 per cent.

In 2024, Matzikama's economic growth is projected at 1.6 per cent. The agriculture, forestry, and fishing sector is expected to see a significant rebound with a growth rate of 6.7 per cent, recovering from a decline in 2023. However, the mining and quarrying sector is anticipated to decline by 2 per cent, and the electricity, gas, and water sector is projected to face a significant decline of 9.5 per cent. The transport, storage, and communication sector is expected to decrease by 12.9 per cent, as growth projections normalise. The finance, insurance, real estate, and business services sector is anticipated to grow by 2.8 per cent, contributing positively to the overall economic outlook. In 2025, the overall economic growth is expected to remain stable at 1 per cent, with agriculture growing by 4.4 per cent and mining declining by 12.4 per cent.

Cederberg's economy is projected to grow by 1.4 per cent in 2024, with strong performances in agriculture (5.1 per cent) and utilities (2.8 per cent). However, the mining and quarrying sector is projected to decline by 7.9 per cent, and the transport, storage, and communication sector is expected to decrease by 8.5 per cent, which could impact overall economic stability. The finance, insurance, real estate, and business services sector is anticipated to grow by 3.9 per cent, contributing positively to the overall economic outlook. In 2025, the overall economic growth is expected to moderate to 2.2 per cent, with agriculture growing by 2.6 per cent and mining declining by 6.2 per cent.

Bergvriervier's economic growth is projected at 1.2 per cent in 2024, with agriculture growing by 5.8 per cent and finance by 3 per cent, indicating strong performance. However, the mining and quarrying sector is projected to decline by 9.6 per cent, and the transport, storage, and communication sector is expected to decrease by 9.6 per cent, which could impact overall economic stability. The construction sector is also expected to decline by 3 per cent. In 2025, the overall economic growth is expected to moderate to 1.8 per cent, with agriculture growing by 3.2 per cent and mining declining by 9.4 per cent.

Swartland's economic growth is projected at 1.3 per cent in 2024, with agriculture growing by 5.8 per cent and finance by 2.5 per cent, indicating strong performance. However, the mining and quarrying sector is projected to decline by 8.5 per cent, and the transport, storage, and communication sector is expected to decrease by 10.7 per cent, which could impact overall economic stability. The construction sector is also expected to decline by 2.1 per cent. In 2025, the overall economic growth is expected to moderate to 1.7 per cent, with agriculture growing by 4.2 per cent and mining growing by 5.1 per cent.



INTERNATIONAL TRADE: WEST COAST TRADE 2023



Exports

R7.8 Billion



Imports

R4.1 Billion



West Coast international trade at a glance		
	Export	Import
Saldanha Bay	R1.8 billion	R1.3 billion
Swartland	R1.2 billion	R2.4 billion
Matzikama	R323.2 million	R57.7 million
Bergrivier	R761.3 million	R307.8 million
Cederberg	R3.6 billion	R81.7 million



Top 3 exported products

Citrus fruit | Flat-rolled products of iron | Flours, meals and pellets

Top 3 imported products

Flat-rolled products of iron | Refrigerators, freezers and other equipment | Unwrought zinc

Top 3 export partners

United States | Netherlands | United Kingdom

Top 3 import partners

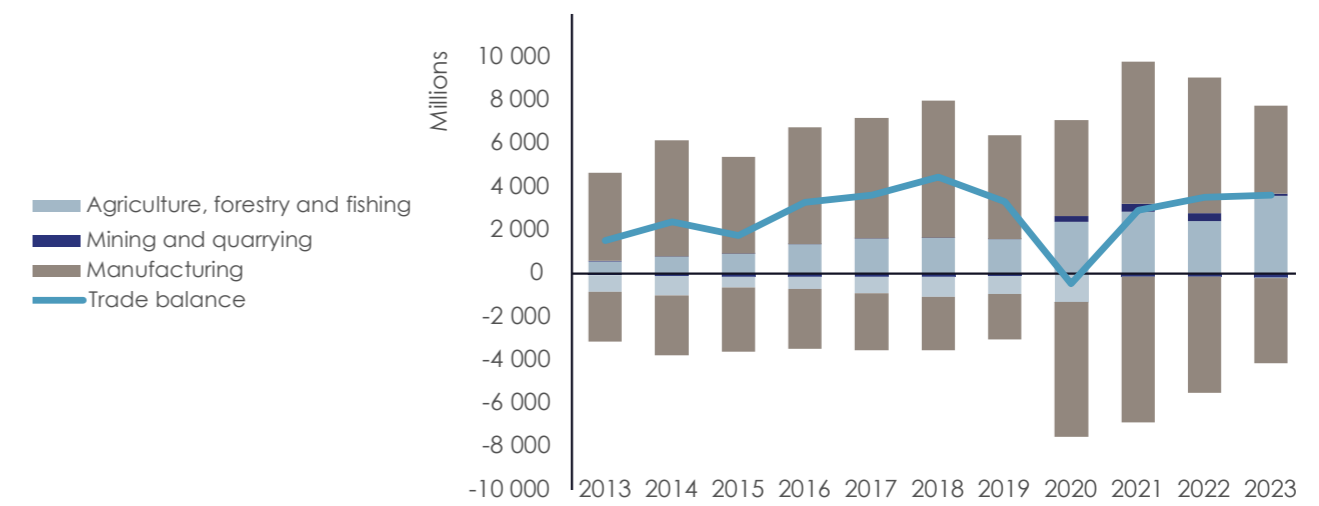
China | Taiwan | Brazil

WEST COAST DISTRICT

The WCD is strategically located along the western coastline of the Western Cape Province and is characterised by its unique blend of natural resources and specialised industries. This region boasts a rich maritime heritage, with its bustling ports serving as vital gateways for international trade. The WCD is particularly distinguished by its thriving fishing industry, which supplies a significant portion of the country's seafood exports. The District's agricultural land also contributes to its economic diversity, producing high-quality crops and wines that are in demand globally. The District is a key steel producer, importing and exporting various steel-related products. The resumption of economic activity in many markets has bolstered construction, creating an increase in demand for steel.

In 2023, WCD exported products valued at R7.7 billion and imports valued at R 4.1 billion, which resulted in a trade surplus of R3.6 billion. Total exports were recorded at R7.8 billion in 2023, which is lower than 2022 values of R9.1 billion, a drop of 14 per cent. The agriculture and manufacturing sectors contributed the most to the WCD's exports, at R4 billion and R3.6 billion, respectively. On the other hand, import values were driven by manufacturing (R3.9 billion); agriculture (R179.7 million) and to a lesser extent mining (R14.8 million).

Figure 50
TRADE BALANCE, West Coast District, 2013 – 2023

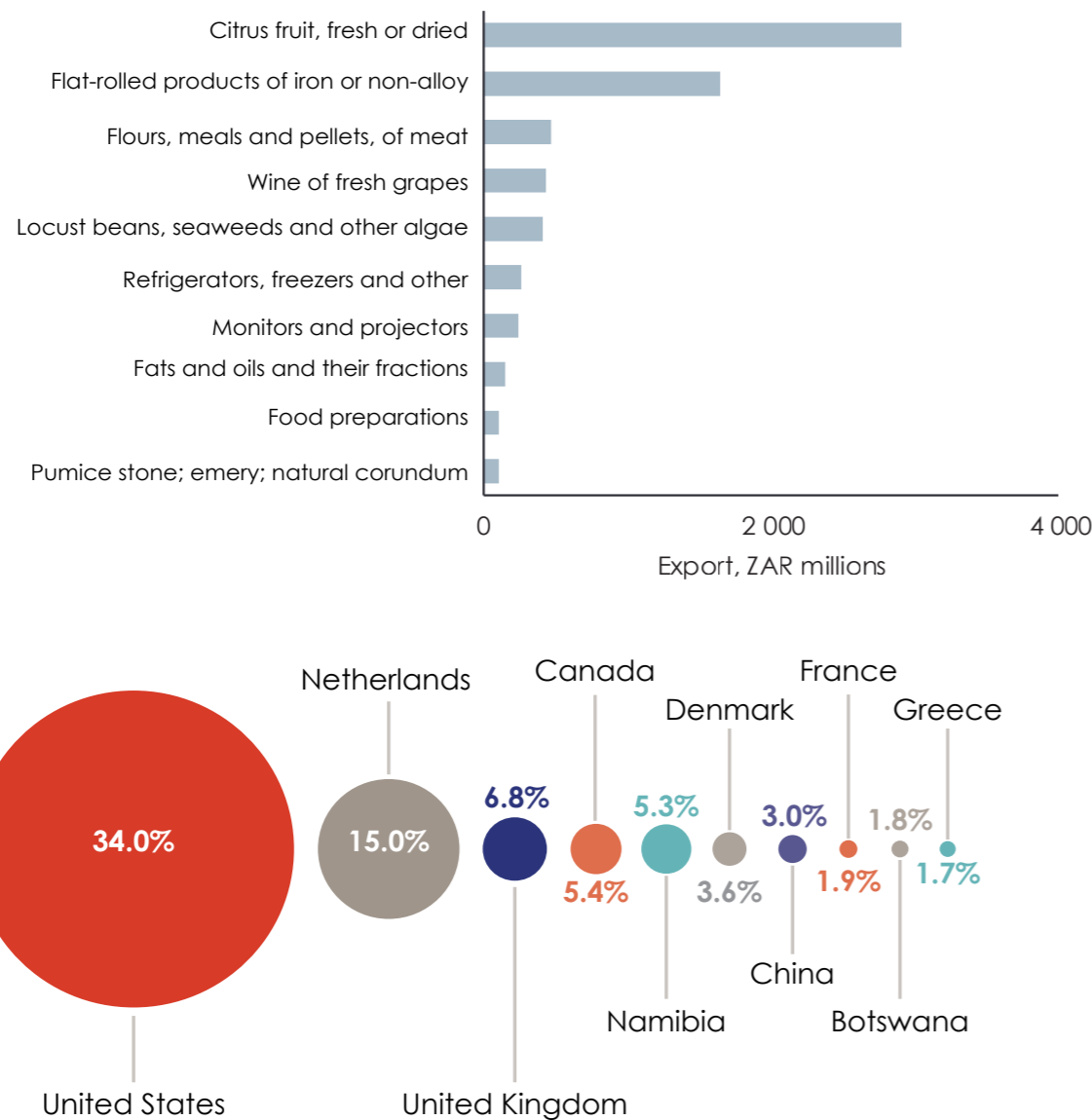


Source: Quantec, 2024

WCD's export basket is dominated by manufactured and agro-processed products. The top three products that were exported included citrus fruit, fresh or dried (R2.9 billion) and flat-rolled products of iron (R1.6 billion), as well as flours, meal and pellets (R467 million). The combination of ideal growing conditions and advanced farming practices with far reaching transportation networks makes the District a leading exporter of high-quality citrus fruits. The WCD is a centre for steel production, contributing substantially to export revenues. With iron ore deposits in close range, there is a steady and cost-effective supply of raw materials needed for steel manufacturing.

The top export partners of the WCD include the US (R2.6 billion), the Netherlands (R1.2 billion) and United Kingdom (R530.1 million). The District has established strong relationships particularly in Europe and the United States with favourable trade agreements such as the AGOA and EPA. Most of the products exported to these key partners include agriculture and steel products.

Figure 51
TOP EXPORT PRODUCTS AND PARTNERS, West Coast District, 2023



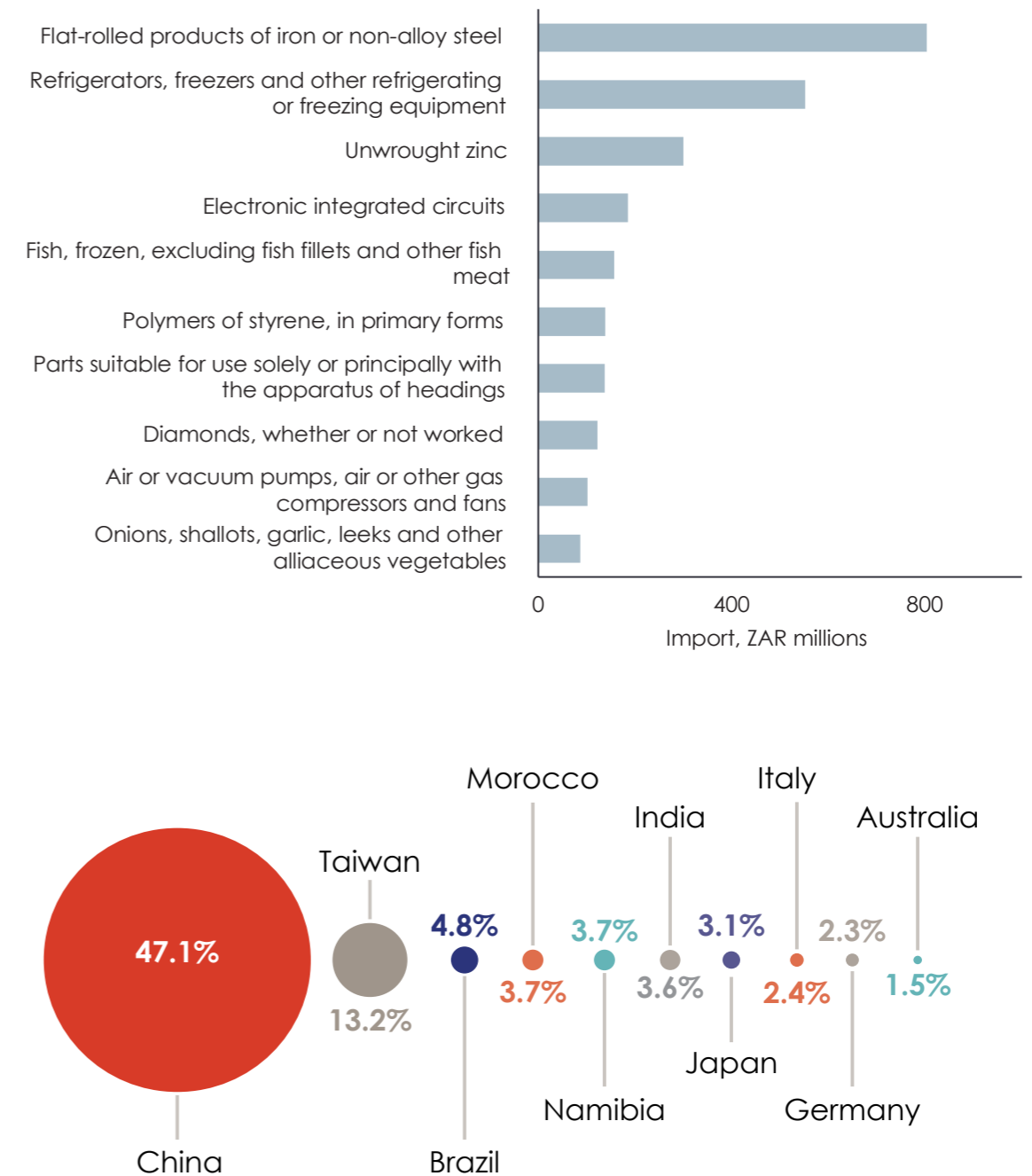
Source: Quantec, 2024

The primary goods imported into the District exhibit a broad scope, from edible items to tools for production – this diversity suggests how varied the economic pursuits of the WCD are. The top three imported products were flat-rolled products of iron or non-alloy steel (R803.4 million), refrigerators, freezer and other refrigerating products (R551.9 million) and unwrought zinc (R299.4 million). Flat rolled products and unwrought zinc account for 26.6 per cent of total imported products into the WCD. Both these products are used in the steel manufacturing industry in Saldanha Bay.

Additional top imports are linked to the District's large aquacultural sector, particularly firms in Saldanha Bay and St Helena Bay. Businesses like Lucky Star and Sea Harvest require imported cooling devices for their freezing and canning processes, in addition to bringing in frozen fish to make up for any local shortfalls in their pelagic fish catch.

These types of products were largely imported from China amounting to (R1.9 billion) and predominantly comprising of refrigerators and freezers. Taiwan supplied products valued at R543.8 million, mostly comprising flat rolled products of iron or non-alloy steel), and from Brazil , the region imported unwrought zinc amongst other products to the value of R199.5 million.

Figure 52
TOP IMPORT PRODUCTS AND PARTNERS, West Coast District, 2023



Source: Quantec, 2024

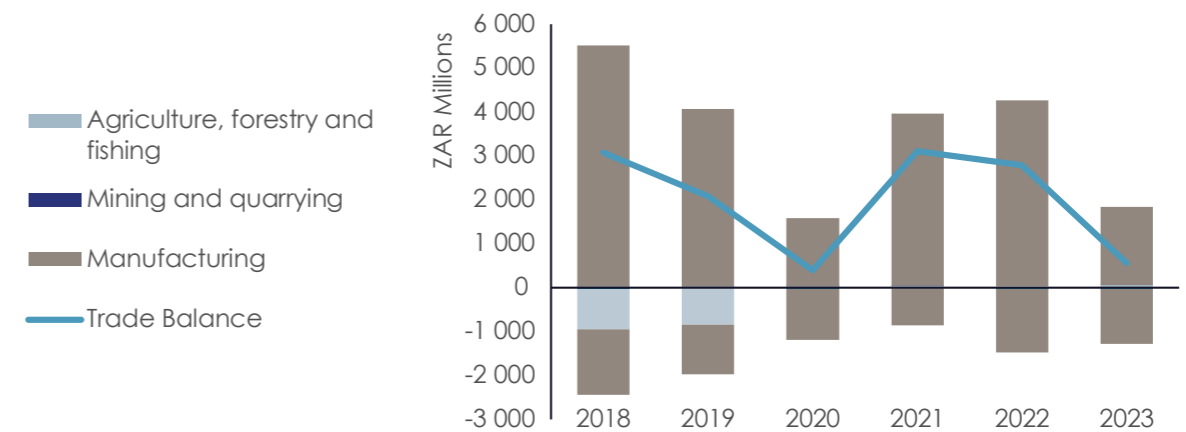
SALDANHA BAY

Saldanha Bay municipality is known for its natural harbour and beautiful coastal scenery, making it a popular destination for tourism and water sports. The fishing industry is a significant contributor to the local economy, with Saldanha Bay being known for its rich marine resources. The municipality also supports various manufacturing sectors, including food and beverages, which are vital for local employment and economic stability.

Saldanha Bay, located on South Africa's west coast, is bordered by the Atlantic Ocean, Olifantskop Mountains, and Langebaan Lagoon and is known for its fishing industry, particularly hake, as well as wheat, sheep, and vegetable production. The region also has a growing industrial sector focused on steel production, shipping, and tourism. Home to the Saldanha Bay IDZ, the area benefits from duty-free imports, promoting business growth. The Port of Saldanha, South Africa's deepest natural port, is key for iron ore exports, but most of the region's top imports and exports go through the Port of Cape Town, limiting the benefit of the IDZ for local manufacturers.³⁶ Consideration should be given to maximising the value that the structural supremacy of a deep-water port could bring to the region.

In 2023, Saldanha Bay recorded a trade surplus of R0.6 billion, after total exports of R1.8 billion and imports of R1.3 billion. While the municipality has consistently maintained a positive trade balance, there was a noticeable decline from 2022, where exports amounted to R4.3 billion and the surplus reached R2.8 billion. The drop in exports, particularly in the manufacturing sector, was significant, with a decrease from R4.2 billion in 2022 to R1.8 billion in 2023. The decline in the overall trade trend from 2022 to 2023 can be attributed to a reduction in global demand for key exports, along with possible disruptions in supply chains. Imports, mainly composed of manufactured products, remained relatively stable, with a slight decrease from R1.5 billion in 2022 to R1.3 billion in 2023. The dip in exports highlights ongoing industrial challenges, especially in boosting export volumes and diversifying export market destinations.

Figure 53
TRADE BALANCE, Saldanha Bay, 2018-2023

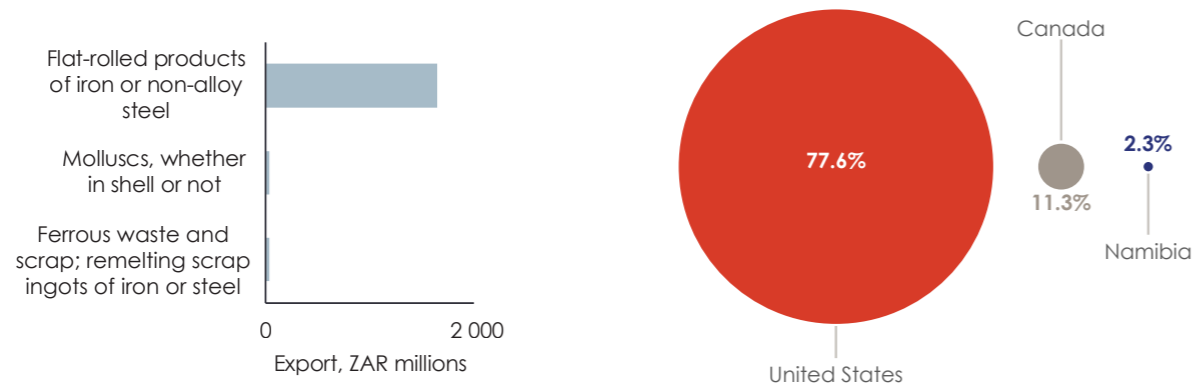


Source: Quantec, 2024

³⁶ Wesgro, 2024

Saldanha Bay's top three exported products were ferrous waste and scrap (R34.7 million), molluscs (R36.1 million), and flat-rolled products of iron or non-alloy steel (R1.65 billion) in 2023. These exports reflect the region's strong industrial sector, particularly in steel production and marine resources. The top export partners for Saldanha Bay were the United States (R1.43 billion), Canada (R207.8 million), and Namibia (R41.9 million).

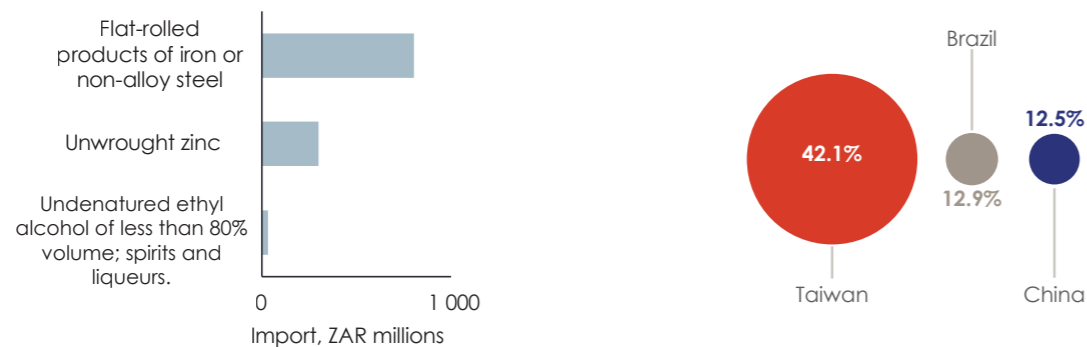
Figure 54
TOP 3 EXPORT PRODUCTS AND TOP 3 EXPORT PARTNERS, Saldanha Bay, 2023



Source: Quantec, 2024

In 2023, Saldanha Bay's top three imports were flat-rolled products of iron or non-alloy steel (R803.5 million), unwrought zinc (R299.4 million), and undenatured ethyl alcohol (R31.5 million). These imports suggest a focus on the industrial sector, particularly in steel production and raw materials. The municipality's top import partners were Taiwan (R537.6 million), Brazil (R164.9 million), and China (R159.8 million).

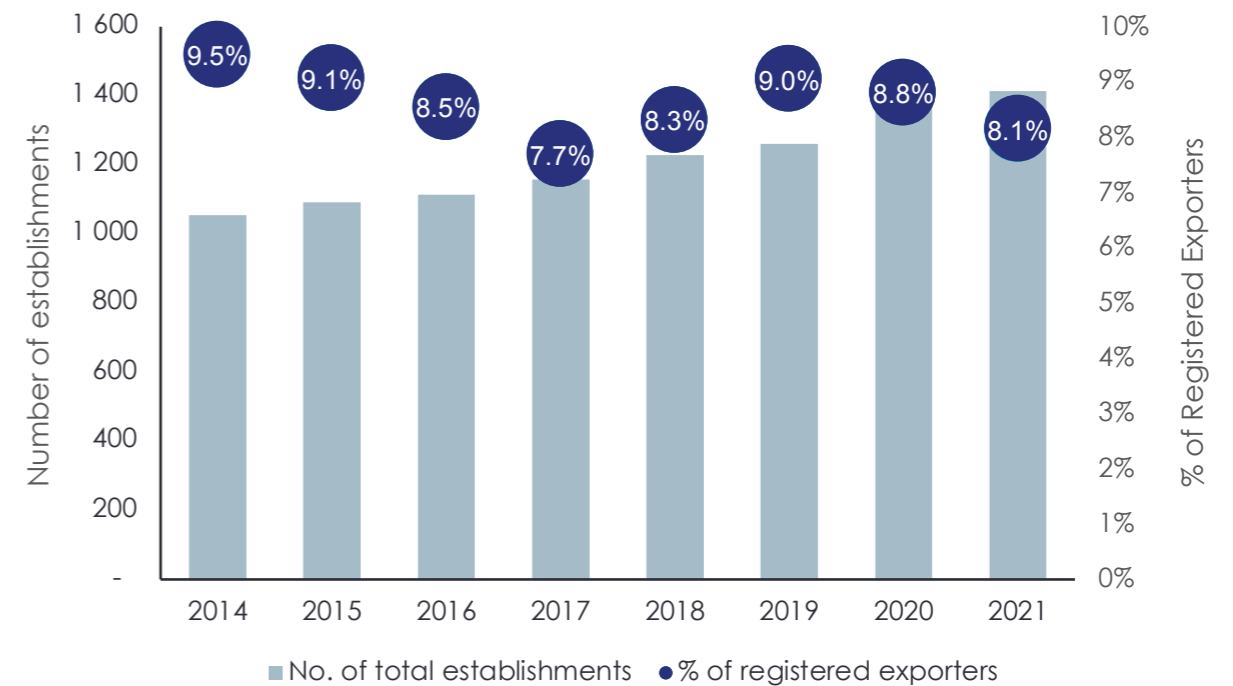
Figure 55
TOP 3 IMPORT PRODUCTS AND TOP 3 IMPORT PARTNERS, Saldanha Bay, 2023



Source: Quantec, 2024

In 2021, Saldanha Bay had 1 414 total registered establishments, with 8.1 per cent of these being registered exporters, a slight decline from 8.8 per cent in 2020. Notably, the percentage of businesses exporting was 9.5 per cent in 2014. Accordingly, while the number of establishments in the area has grown, the number of export-oriented businesses has not kept pace. The steady decline in the percentage of exporters highlights the need for efforts to foster more export-driven enterprises to diversify and strengthen the local economy.

Figure 56
TOP PERCENTAGE OF REGISTERED EXPORTERS AS A PROPORTION OF TOTAL BUSINESS ESTABLISHMENTS, Saldanha Bay, 2014 – 2023



Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

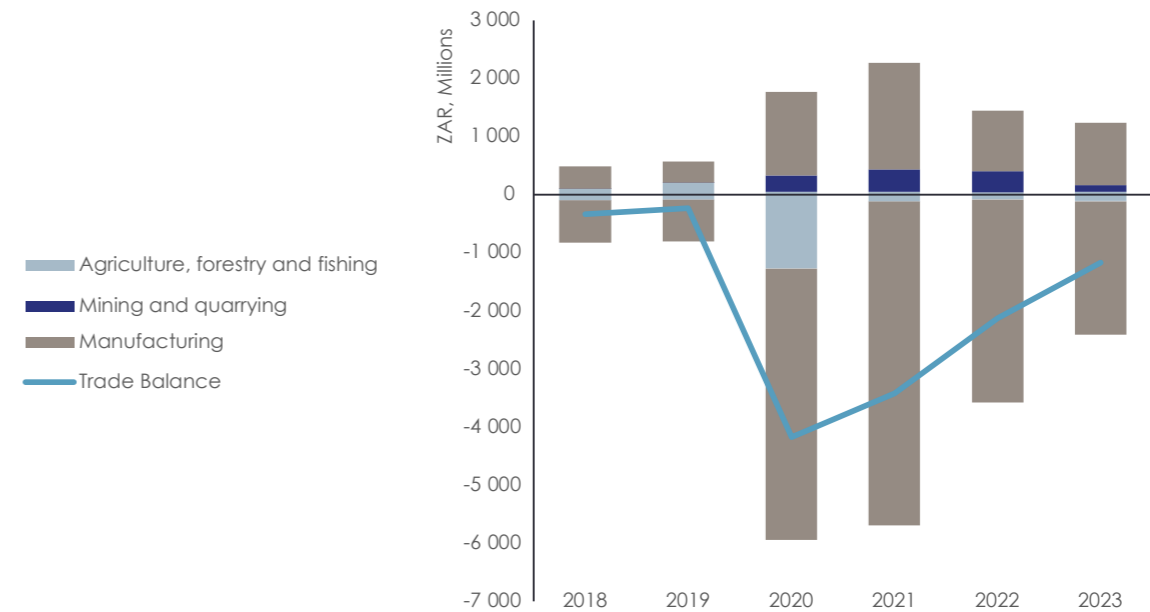
SWARTLAND

Swartland Municipality is known for its rich agricultural heritage, particularly its production of high-quality wheat and wine. The region is also recognized for its beautiful landscapes, including coastal areas like Yzerfontein, and its vibrant towns such as Malmesbury and Darling. Additionally, it is noted for being a hub of economic activity with a diversified economy that includes manufacturing, wholesale and retail trade, and agriculture.

Swartland, the largest in terms of square meterage of the five municipal areas in the District, is bordered by three mountain ranges: the Obiqua Mountains to the west, the Winterhoek Mountains to the north, and the Witzenberg Range to the east. Covering half of the total geographical area, the region is internationally recognised for its high-quality export products, including deciduous fruits, vegetables, and wines. Additionally, Swartland produces olives, grains, beef, and pork. The municipal area is also home to quaint fishing and farming communities such as Yzerfontein, Grotto Bay, Darling, and Riebeeck-Kasteel. However, the town of Malmesbury drives the region's economy, with a heavy focus on manufacturing and quarrying activities, making it a key industrial hub in the area.

In 2023, Swartland recorded a trade deficit of R1.2 billion, with total exports amounting to R1.2 billion and imports totalling R2.4 billion. This marks a significant improvement in the deficit from 2022 but a marked drop in exports. The drop in exports, particularly in the manufacturing sector, can be attributed to a decrease in demand for key export products. The decline in imports is reflective of the decline in GDP performance within the manufacturing and larger industrial sector.

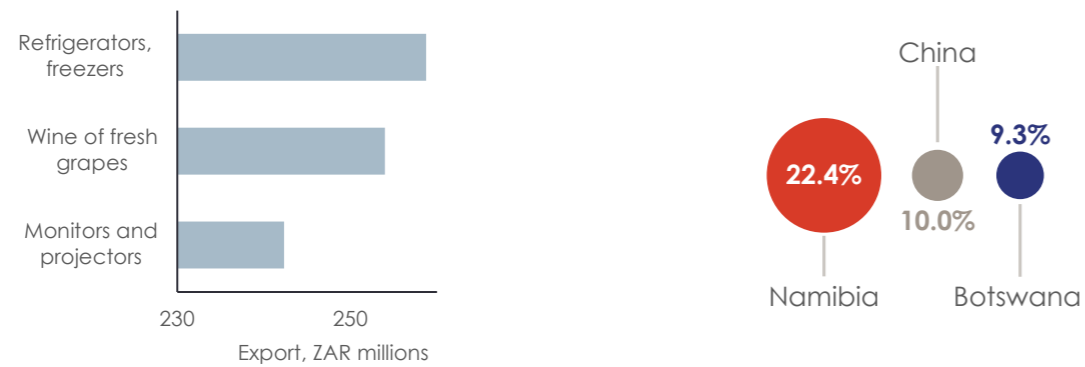
Figure 57
TRADE BALANCE, Swartland, 2018-2023



Source: Quantec, 2024

Of the total exports (R1.2 billion) in 2023, the top three exported products were monitors and projectors (R242.3 million), wine and fresh grapes (R254 million), and refrigerators/freezers (R258.7 million). These exports highlight Swartland's diverse industrial base, with a strong presence in electronics, agriculture, and manufacturing. The top export partners for Swartland were Namibia (R277.4 million), China (R123.3 million), and Botswana (R115.5 million).

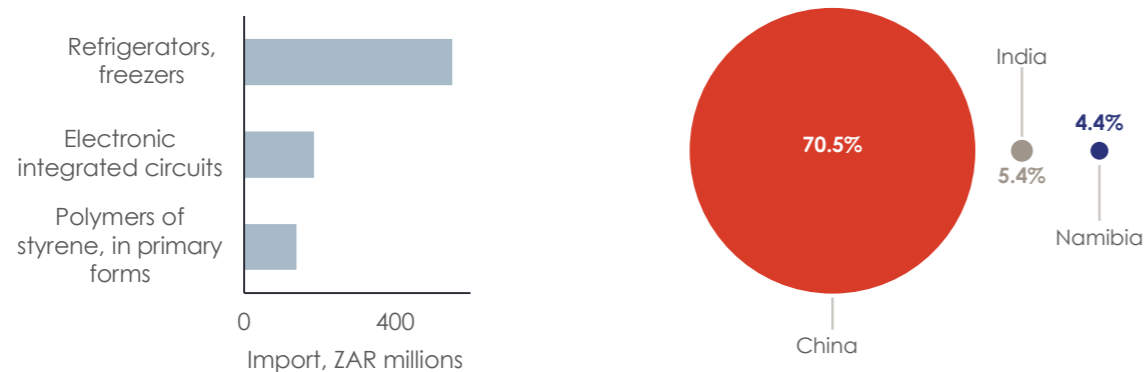
Figure 58
TOP 3 EXPORT PRODUCT AND TOP 3 EXPORT PARTNERS, Swartland, 2023



Source: Quantec, 2024

In 2023, the top three products imported by Swartland municipal area were polymers of styrene in primary forms (R139.2 million), electronic integrated circuits (R185.3 million), and refrigerators/freezers (R551.1 million). These imports reflect a broad range of production requirements, without a specific industry focus, indicating Swartland's diverse manufacturing and industrial needs. The top import partners for Swartland were China (R1.7 billion), India (R129.1 million), and Namibia (R105.9 million). This wide range of imports highlights the area's reliance on global markets for various components and materials essential for its industrial and manufacturing sectors.

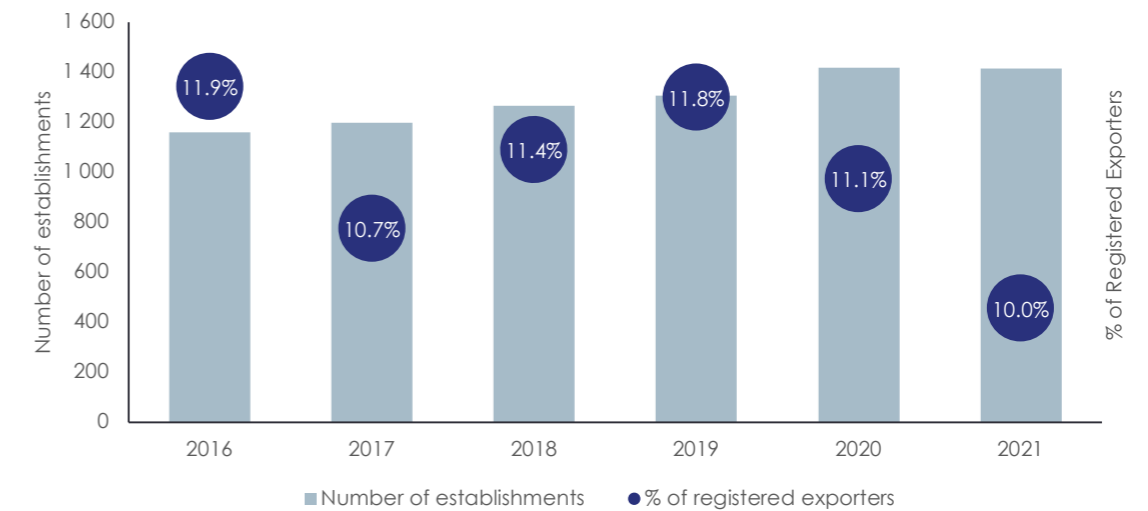
Figure 59
TOP 3 IMPORT PRODUCTS AND TOP 3 IMPORT PARTNERS, Swartland, 2023



Source: Quantec, 2024

In 2021, Swartland saw a slight decrease in the number of registered businesses, dropping to 1 414 from 1 419 in 2020. However, the proportion of exporters compared to total establishments has been gradually decreasing. In 2014, 12.6 per cent of businesses were exporters, but by 2021, this had dropped to 10 per cent. While, over the entire time horizon, the total number of businesses has grown, the proportion of export-oriented operations has declined, indicating that there is potential for further development in the export sector. Encouraging more businesses to engage in international trade could help reverse this trend.

Figure 60
TOP PERCENTAGE OF REGISTERED EXPORTERS AS A PROPORTION OF TOTAL BUSINESS ESTABLISHMENTS, Swartland, 2016 – 2021



Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

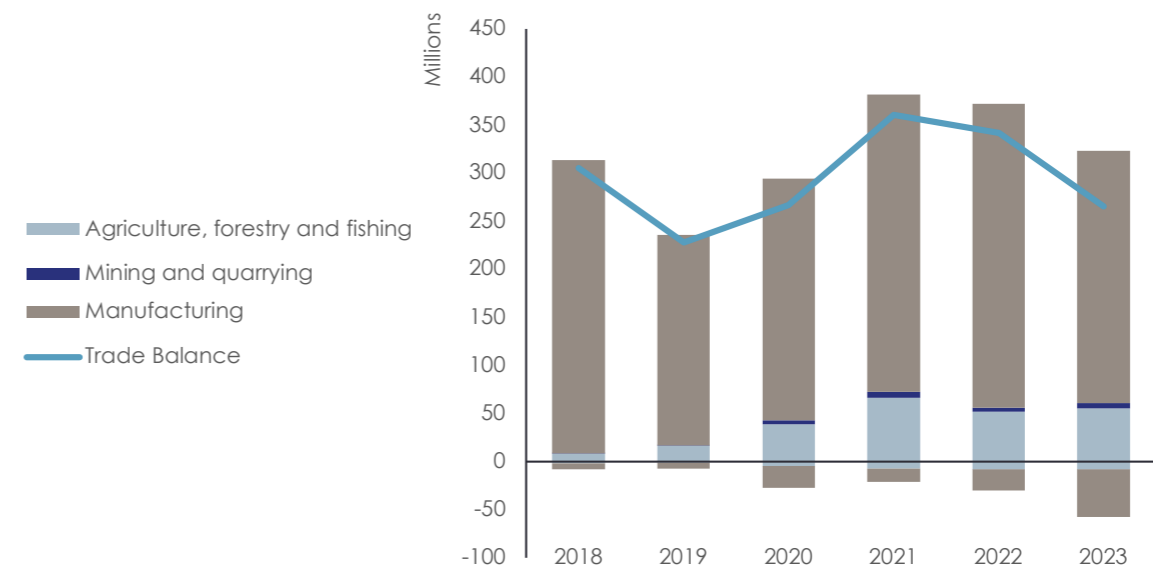
MATZIKAMA

Matzikama, arid but vitally connected by the Olifants River, supports a flourishing agricultural sector primarily based on viniculture, home to the world-renowned West Coast Winelands wines and tourist destinations in southern Namaqualand.

Matzikama municipality, is bordered by the Obiqua, Winterhoek, and Witzenberg mountain ranges. Despite low annual rainfall, the region maintains a strong agricultural sector, supported by the Olifants River Irrigation Scheme. This 321 km network of canals, dating back to the 19th century, channels water from the Bulshoek and Clanwilliam dams to 680 farms and various industries. The irrigation system enables the production of wine, vegetables, fruits, olives, grains, and livestock, making agriculture a key contributor to the area's economy.

In 2023, Matzikama recorded a trade surplus of R265.5 million, with total exports reaching R323.2 million and imports totalling R57.7 million. This trend marks a slight decrease in net-positive trade compared to 2022, where exports were R371.9 million and the trade surplus was R341.9 million. The decline in exports can largely be attributed to a decrease in manufacturing exports. Imports showed a significant increase, rising from R29.9 million in 2022 to R57.7 million in 2023, largely driven by demand for manufactured goods.

Figure 61
TRADE BALANCE, Matzikama, 2018-2023

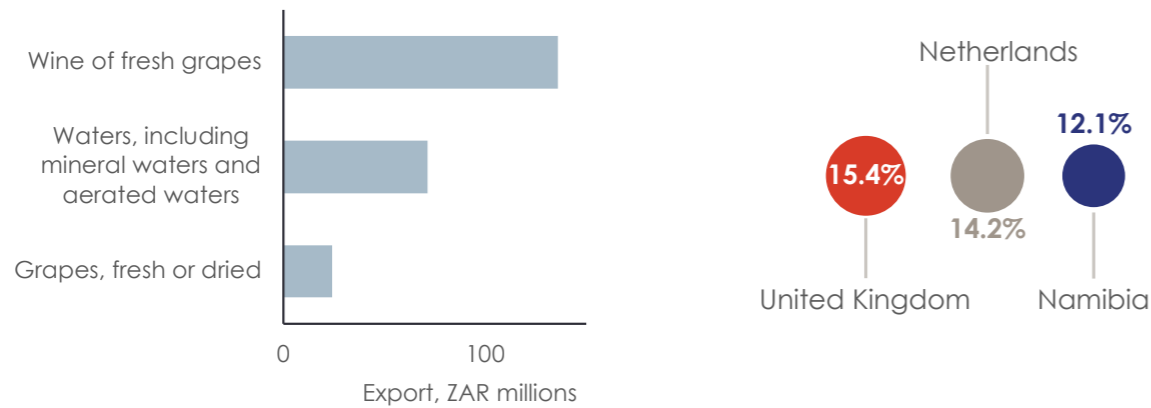


Source: Quantec, 2024



Matzikama's total exports reached R323.2 million, with the top three exported products being wine (R135.9 million), waters including mineral and aerated waters (R71.2 million), and fresh or dried grapes (R24.2 million) in 2023. These exports reflect the area's strong agricultural and agri-processing sectors, particularly in the wine and beverage industries. In 2023, the region's key export destinations were the United Kingdom (R49.8 million), the Netherlands (R45.8 million), and Namibia (R39.2 million), underscoring Matzikama's competitive position in the global agricultural market.

Figure 62
TOP 3 EXPORT PRODUCT AND TOP 3 EXPORT PARTNERS, Matzikama, 2023

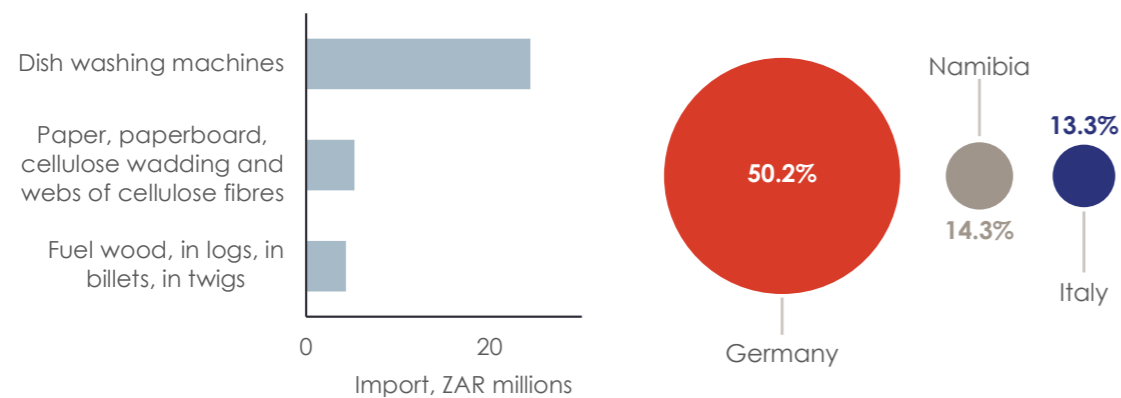


Source: Quantec, 2024

In 2023, the top three products imported by Matzikama area were dishwashing machines (R24.4 million), paper, paperboard, cellulose wadding and webs of cellulose fibres (R5.2 million) and fuel wood, in logs and in twigs (R4.3 million). These imports reflect a broad range of production requirements, without a specific industry focus, indicating Matzikama's diverse manufacturing and industrial needs.

The top import partners for Matzikama were Germany (R28.9 million), Namibia (R8.2 million) and Italy (R7.7 million). This wide range of imports highlights the area's reliance on global markets for various components and materials essential for its industrial and manufacturing sectors.

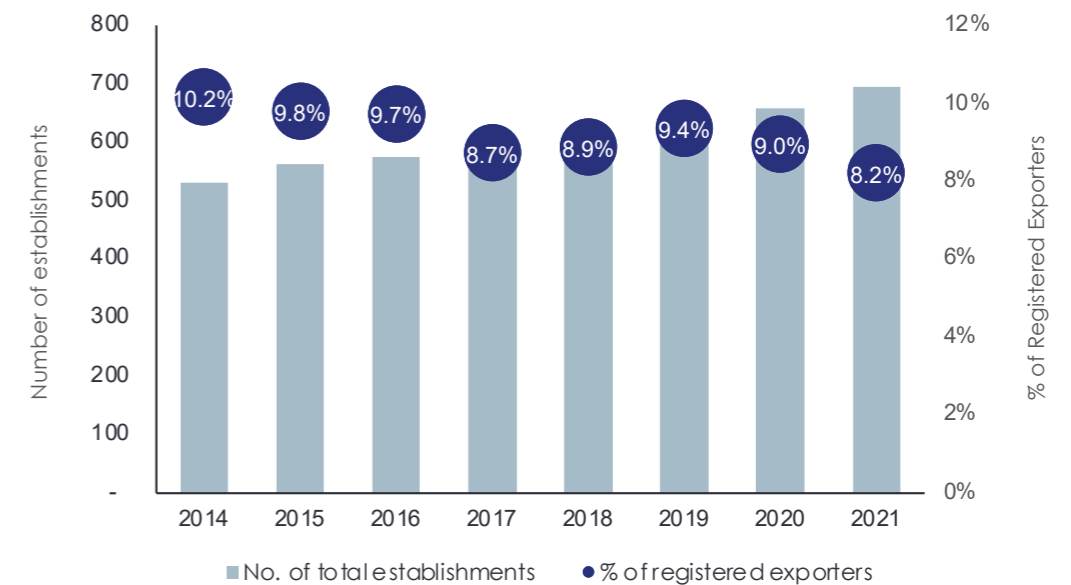
Figure 63
TOP 3 IMPORT PRODUCT AND TOP 3 IMPORT PARTNERS, Matzikama, 2023



Source: Quantec, 2024

In 2021, Matzikama had a total of 695 establishments, with 57 of them being registered exporters, accounting for 8.2 per cent of the total. This trend marked a slight decrease from 2020, where the proportion of exporters was 9 per cent. The overall increase in total establishments, combined with the drop in the percentage of exporters, suggests that export-driven growth in the municipality remains concentrated within a smaller number of firms. To foster broader export activity, Matzikama may need to focus on supporting more businesses to engage in international trade and expand their export potential.

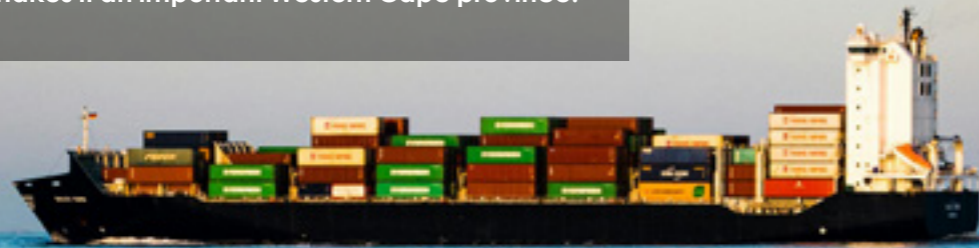
Figure 64
PERCENTAGE OF REGISTERED EXPORTERS AS A PROPORTION OF TOTAL BUSINESS ESTABLISHMENTS, Matzikama, 2014 – 2021



Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

BERGRIVIER

Bergrivier Municipality, renowned for its stunning natural landscapes, is a popular destination for outdoor activities, eco-tourism, adventure sports, and cultural experiences. Its strong agricultural sector contributes to the local economy and its strategic location makes it an important Western Cape province.

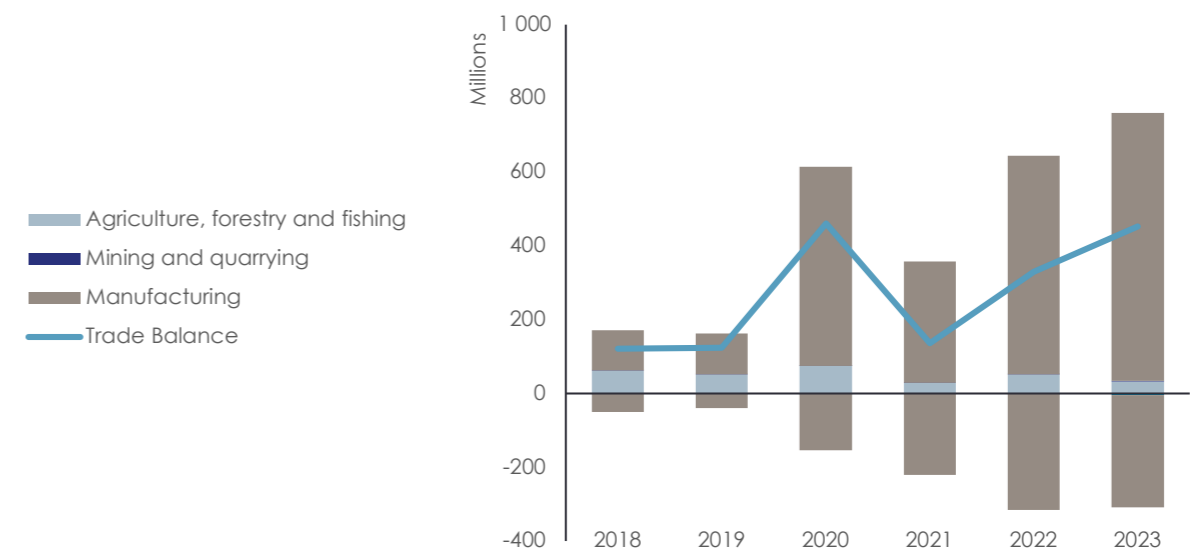


Bergrivier municipality, located along the West Coast, is renowned for its thriving fishing and fish-processing industries, with towns such as Velddrif and Laaiplek playing a central role. Fishing enterprises in the area specialise in the harvesting and processing of sardines, anchovies, and redeye herring. The municipality's coastal position makes it an ideal hub for these industries, which are vital to the region's economy. Despite the challenges of low rainfall, Bergrivier benefits from its access to the sea, ensuring a steady supply of marine resources. The region's fish-processing sector continues to be a significant contributor to its trade and export profile.

In 2023, Bergrivier recorded a trade surplus of R453.5 million, following total exports of R761.3 million and imports of R307.8 million. This trend represents a significant increase from 2022, where the municipal area recorded a surplus of R329.2 million, with exports totalling R644.6 million and imports at R315.4 million. The increase in the surplus can largely be attributed to the strong performance of the manufacturing sector, which saw exports grow from R592.4 million in 2022 to R726.7 million in 2023. Meanwhile, exports from agriculture, forestry, and fishing also contributed, totalling R33.2 million in 2023. The Bergrivier municipal area has maintained a positive trade balance in recent years. This has been primarily due to the performance of the agriculture and manufacturing sectors, which together have consistently contributed to the region's surplus.

Imports, predominantly consisting of manufactured goods, decreased slightly from R315.4 million in 2022 to R307.8 million in 2023, reflecting a small reduction in demand for imported products. Despite the challenges posed by global market conditions, Bergrivier's positive and improving trade balance demonstrates the continued strength of its key export sectors, particularly manufacturing, while also highlighting the ongoing effort to maintain strong trade performance. The region's trade performance in 2023 underscores its resilience, with growth in exports despite global disruptions.

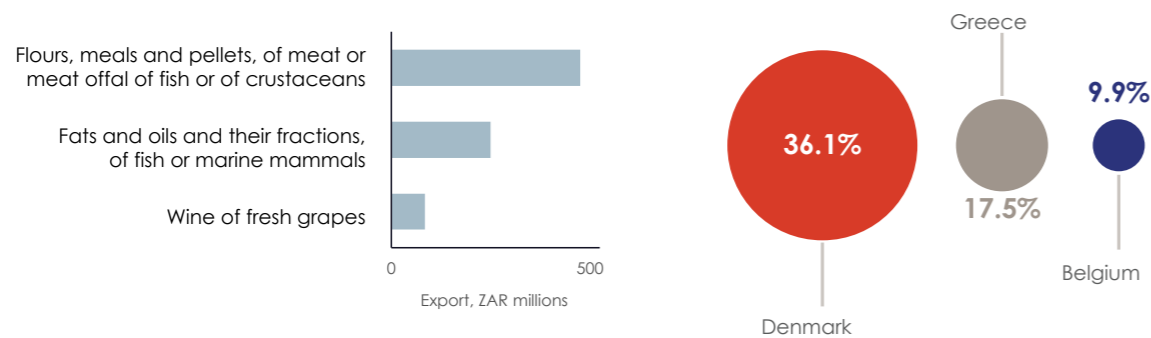
Figure 65
TRADE BALANCE, Bergrivier, 2018-2023



Source: Quantec, 2024

Of the total exports (R761.3 million) from Bergrivier in 2023, the top three exported products were: fats and oils and their fractions (R149.9 million), flours, meals, and pellets of meat or meat offal (R467.6 million), and wine of fresh grapes (R28.3 million). This export basket reflects the strength of Bergrivier’s manufacturing sector, particularly in the food and beverage industries. The top three export partners were Denmark (R274.6 million), Greece (R133.4 million), and Belgium (R75 million), underscoring Matzikama’s competitive position in the global agricultural market.

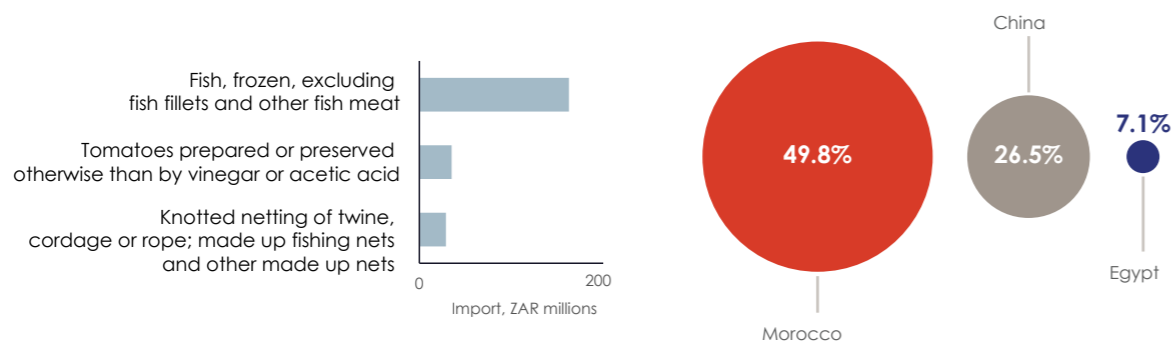
Figure 66
TOP 3 EXPORT PRODUCT AND TOP 3 EXPORT PARTNERS, Bergrivier, 2023



Source: Quantec, 2024

In 2023, the top three imported products in the Bergrivier municipal area were: knotted netting of twine (R12.2 million), tomatoes prepared or preserved (R85.5 million), and frozen fish (R156.9 million). These imports reflect a diverse range of production needs across various industries. The municipality’s main import partners were Morocco (R153.3 million), China (R81.6 million), and Egypt (R21.9 million), underscoring the global nature of Bergrivier’s trade relationships.

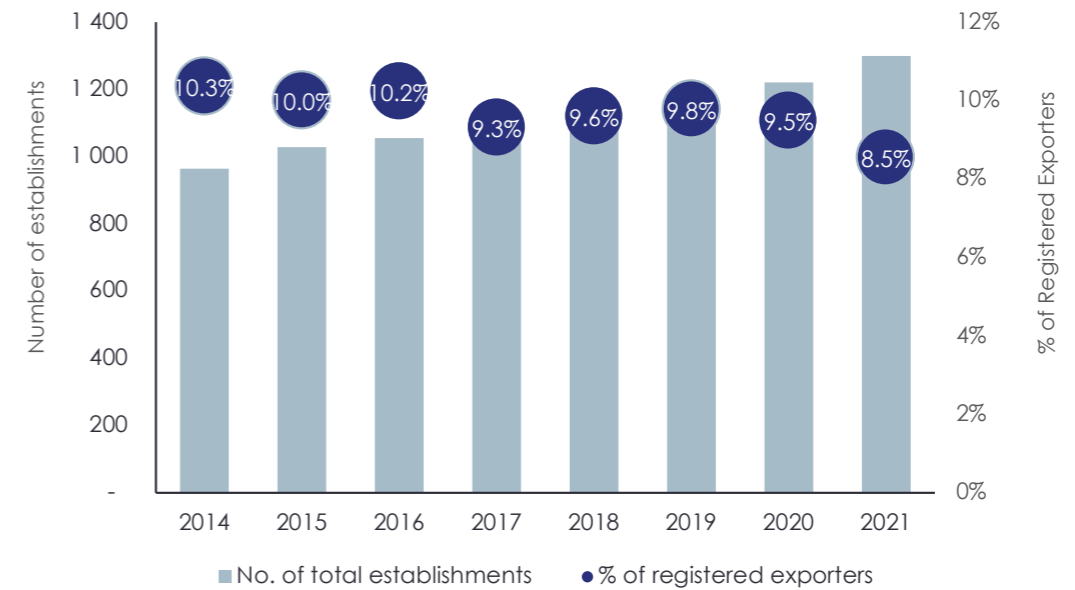
Figure 67
TOP 3 IMPORT PRODUCT AND TOP 3 IMPORT PARTNERS, Bergrivier, 2023



Source: Quantec, 2024

Between 2020 and 2021, the number of total establishments in the region continued to rise, reaching 1 298 in 2021 from 1 221 in 2020. However, the proportion of registered exporters showed a further decline over this period. In 2021, 8.5 per cent of all establishments were registered exporters, down from 9.5 per cent in 2020. While the total number of establishments grew, the percentage of exporters continued to decrease, suggesting that export growth in the region remains concentrated among a small number of businesses. This trend highlights the ongoing need for initiatives to promote and expand the development of export-oriented businesses within the area.

Figure 68
PERCENTAGE OF REGISTERED EXPORTERS AS A PROPORTION OF TOTAL BUSINESS ESTABLISHMENTS, Bergrivier, 2014 – 2021



Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024



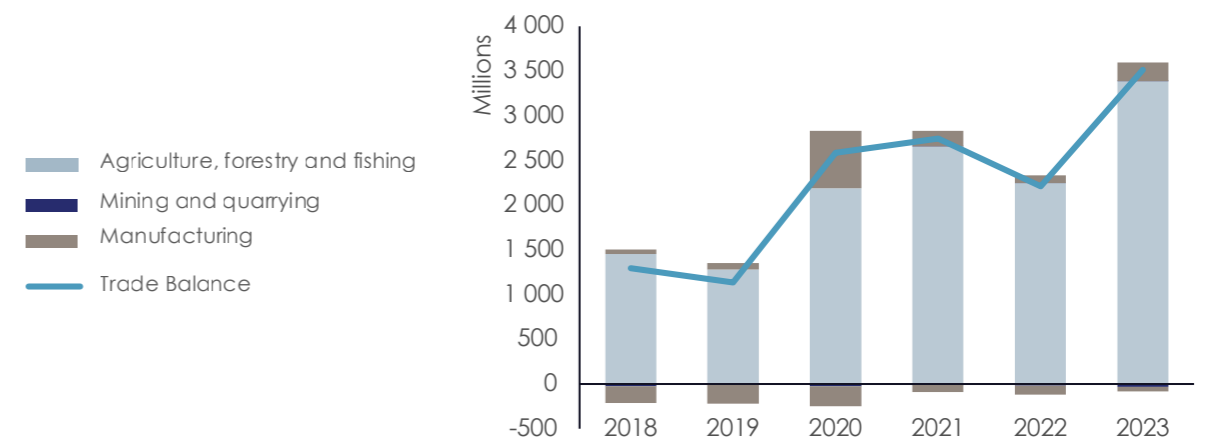
CEDERBERG

The Cederberg Municipality is nestled between the rugged Cederberg Mountains to the east and the Atlantic Ocean to the west, offering a unique blend of coastal and mountainous landscapes. As one of the notable municipalities in the Western Cape, it covers a significant portion of the West Coast District. The region is known for its diverse and fertile agricultural output, producing a wide range of high-quality products such as citrus fruits, rooibos tea, and wine grapes. Additionally, Cederberg is a key producer of livestock, including sheep and cattle. With its favourable climate and rich soils, the municipality plays a vital role in the provincial economy and is recognised for both its agricultural exports and eco-tourism appeal.

The municipal area has a strong agriculture sector, contributing positively to the trade balance. Cederberg municipality imports a large quantity of goods in the manufacturing sector, compared to what it exports, however still maintains a positive trade balance due to the contribution of the agriculture sector. Imported manufactured products in the municipality fell by 49.4 per cent between 2022 and 2023, indicating a potential local supply of these products and signalling an improving manufacturing sector.

Favourable farming conditions have supported strong agricultural performance, including the production and export of high-demand products such as citrus and sugar cane, despite the difficult weather conditions and loadshedding. The thriving agriculture sector as well as an improving manufacturing sector has significantly contributed to the improved performance of the its growing trade balance.

Figure 69
TRADE BALANCE, Cederberg, 2018-2023



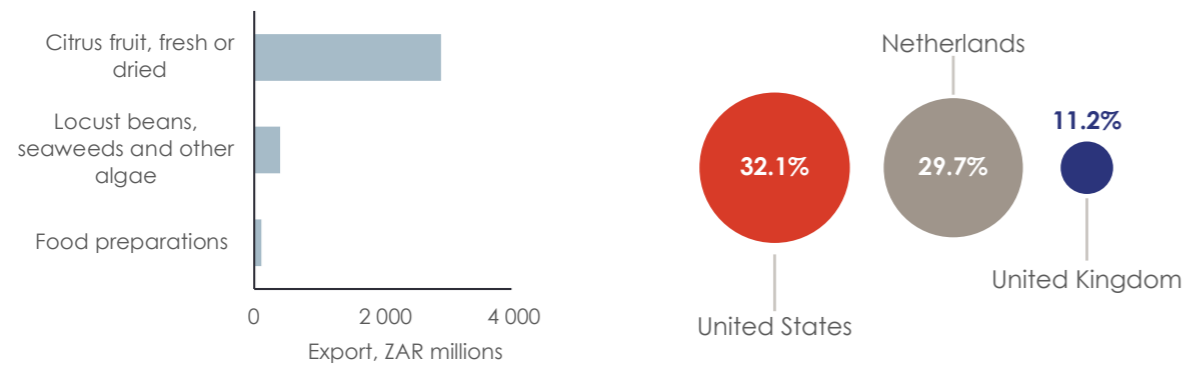
Source: Quantec, 2024



In 2023, Cederberg's Municipality had the following top three exported products: citrus fruit (R2.9 billion), locust beans, seaweeds and other algae (R404.3 million) and other food preparations (R106.9 million). These exports highlight the region's agricultural strengths particularly in the citrus market. The Cederberg region is renowned for its thriving citrus market, producing high-quality oranges, lemons, and other citrus fruits that are exported globally. The largest citrus farm in the region, Goede Hoop Citrus, significantly contributes to the municipality's agricultural performance, driving economic growth and providing employment opportunities. Goede Hoop Citrus, along with other citrus producers, plays a crucial role in maintaining Cederberg's reputation as a key player in the Western Cape's citrus industry.

The municipality's key export markets include the United States, which received R1.2 billion worth of goods, followed by the Netherlands (R1.1 billion) and the United Kingdom (R403.6 million). These markets reflect Cederberg's strong ties with international destinations in the agriculture industry. Cederberg's massive citrus market makes it a significant contributor towards the WCD's overall GDP.

Figure 70
TOP 3 EXPORT PRODUCT AND TOP 3 EXPORT PARTNERS, Cederberg, 2023



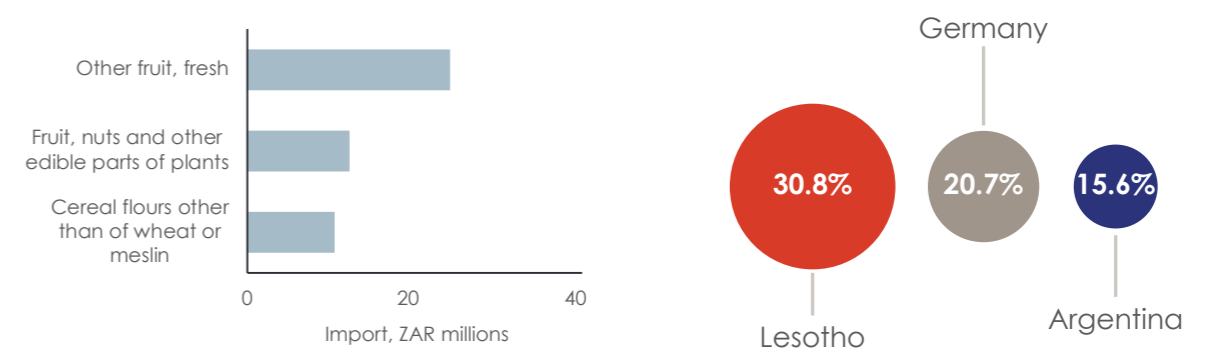
Source: Quantec, 2024

The municipal area's imports dropped from R117.3 million in 2022 to R81.7 million in 2023, primarily driven by a lower demand for manufactured products. Agricultural imports increased from R169 million in 2022 to R309.4 million in 2023. Despite increasing imports in the agricultural sector, the manufacturing sector has largely contributed to the improvement in the municipal area's enhanced trade balance.

The top imports were other fruits (R25.1 million), fruits, nuts and other edible parts of plants (R12.7 million), and cereal flours (R10.8 million). These imports highlight the need for agricultural products essential to the local economy not met by local production.

Lesotho emerged as the leading import partner for Cederberg, with a total of R251.6 million in imports. Germany followed with imports valued at R169.2 million, while Argentina contributed R127.3 million. These import partnerships demonstrate the municipality's ongoing efforts to diversify its supply chains and support local industries with the necessary goods for both production and consumption.

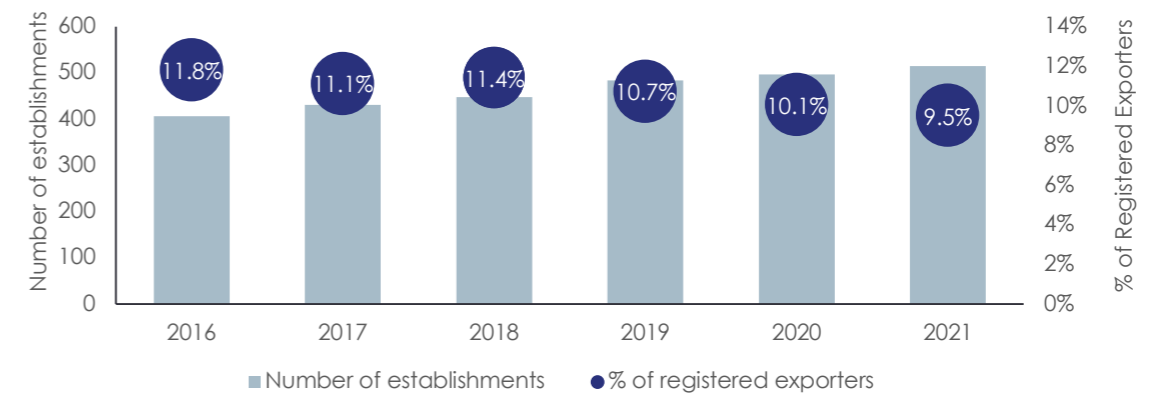
Figure 71
TOP 3 IMPORT PRODUCT AND TOP 3 IMPORT PARTNERS, Cederberg, 2023



Source: Quantec, 2024

In 2021, the municipal area had 515 total establishments, with 49 of them registered as exporters. This represents a slight decline in the proportion of registered exporters, from 10.1 per cent in 2020 to 9.5 per cent in 2021. The decline in the proportion of registered exporters indicates that the growth of export-oriented enterprises has not kept pace. This trend highlights the need for strategic initiatives to foster a more diverse and export-driven business sector, enabling Cederberg to tap into more global markets.

Figure 72
PERCENTAGE OF REGISTERED EXPORTERS AS A PROPORTION OF TOTAL BUSINESS ESTABLISHMENTS, Cederberg, 2016 – 2021



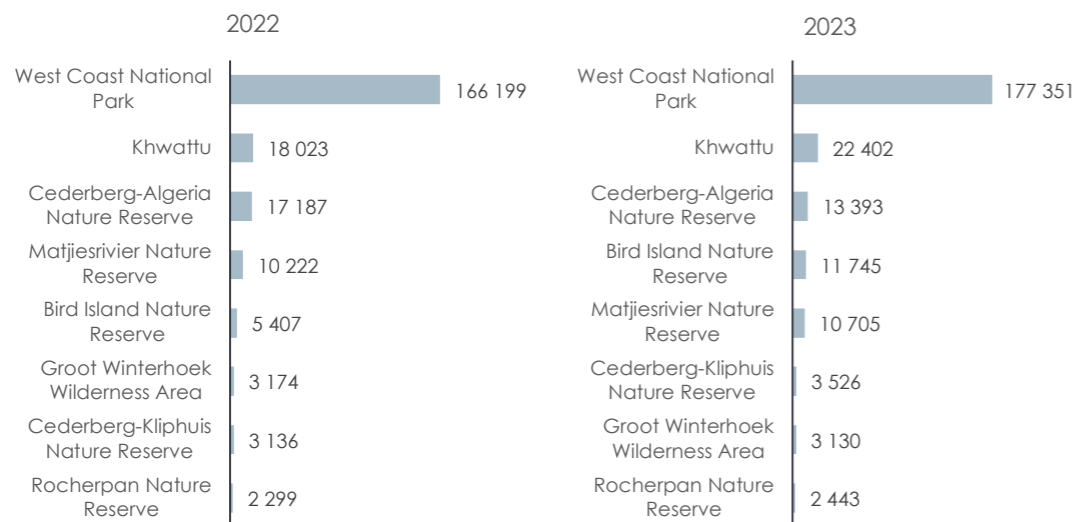
Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

TOURISM

In 2023, the Western Cape's tourism sector experienced significant growth, with a total of 54 participating attractions across its six regions recording 7.7 million visitors between January and December 2023. This marked a 38 per cent increase in visitor numbers compared to the same period in 2022.

The WCD saw an 8 percent increase in tourist numbers, which can be attributed to attractions such as the West Coast National Park and the Bird Island Nature Reserve. While the former saw some 10 000 additional tourists, the Bird Island Nature Reserve benefited from an 117 per cent rise in the number of tourists between 2022 and 2023. Overall, the region achieved a strong 67.3 percent recovery in visitor numbers relative to 2019 (January to December).

Figure 73
THE TOTAL NUMBER OF VISITORS TO ATTRACTIONS, West Coast District, 2022 – 2023

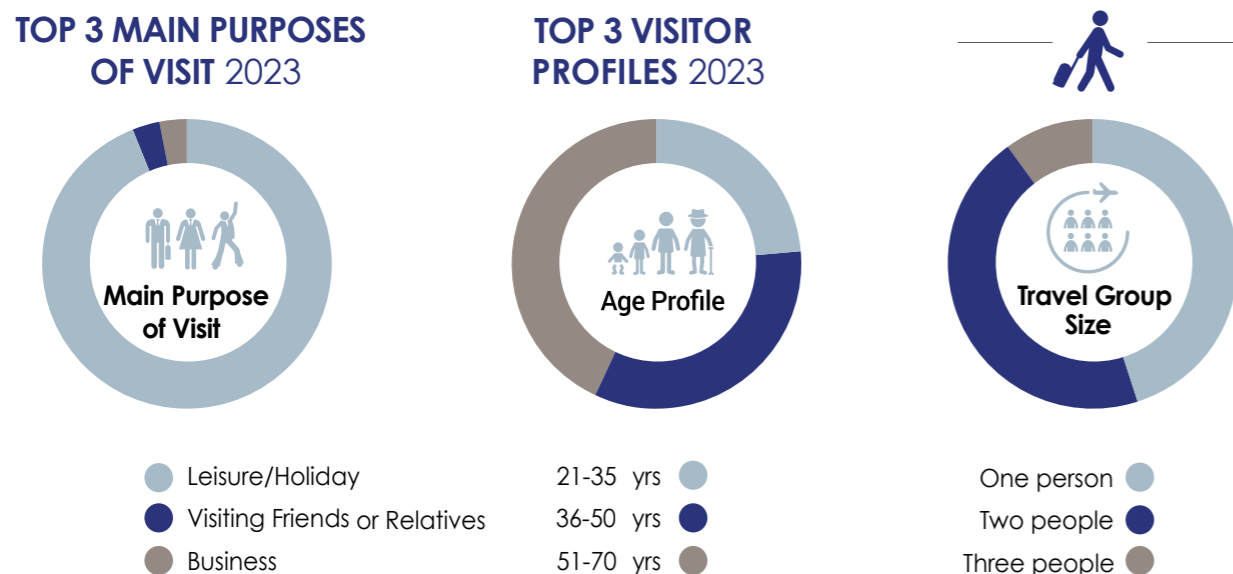


Source: Wesgro, 2024

A significant portion of the WCD's visitors (86.8 per cent) travelled for leisure or holiday purposes, while the remaining travelled to either connect with friends and relatives (2.1 per cent) or for business (2.1 per cent). The District attracted a diverse age demographic, with no single age group dominating. Most travelled in groups of two. Notably, a considerable proportion of travellers (6.9 per cent) ventured alone.



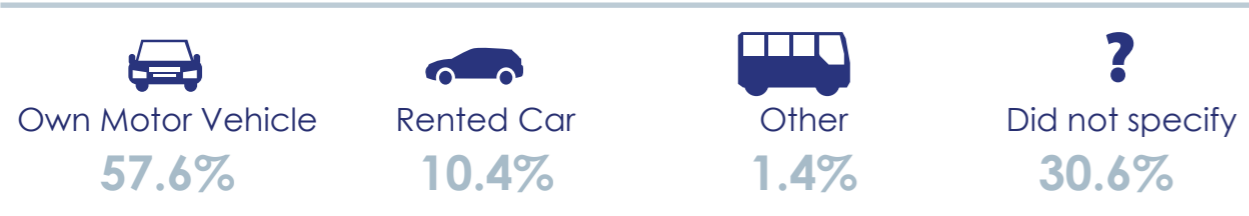
Figure 74
VISITOR PROFILE, West Coast District, 2023



Source: Wesgro, 2024

Nearly two-thirds of visitors (57.6 per cent) preferred to use their own mode of transport. This preference is largely due to the dominant share of local visitors (77.3 per cent) to the region. Rented cars, used by 10.4 per cent of visitors, were the second most popular form of transport. Additional transport options found in the 'other' category included tour buses, long-distance buses, mini-bus taxis, motorbikes, shuttle services, and metered taxis.

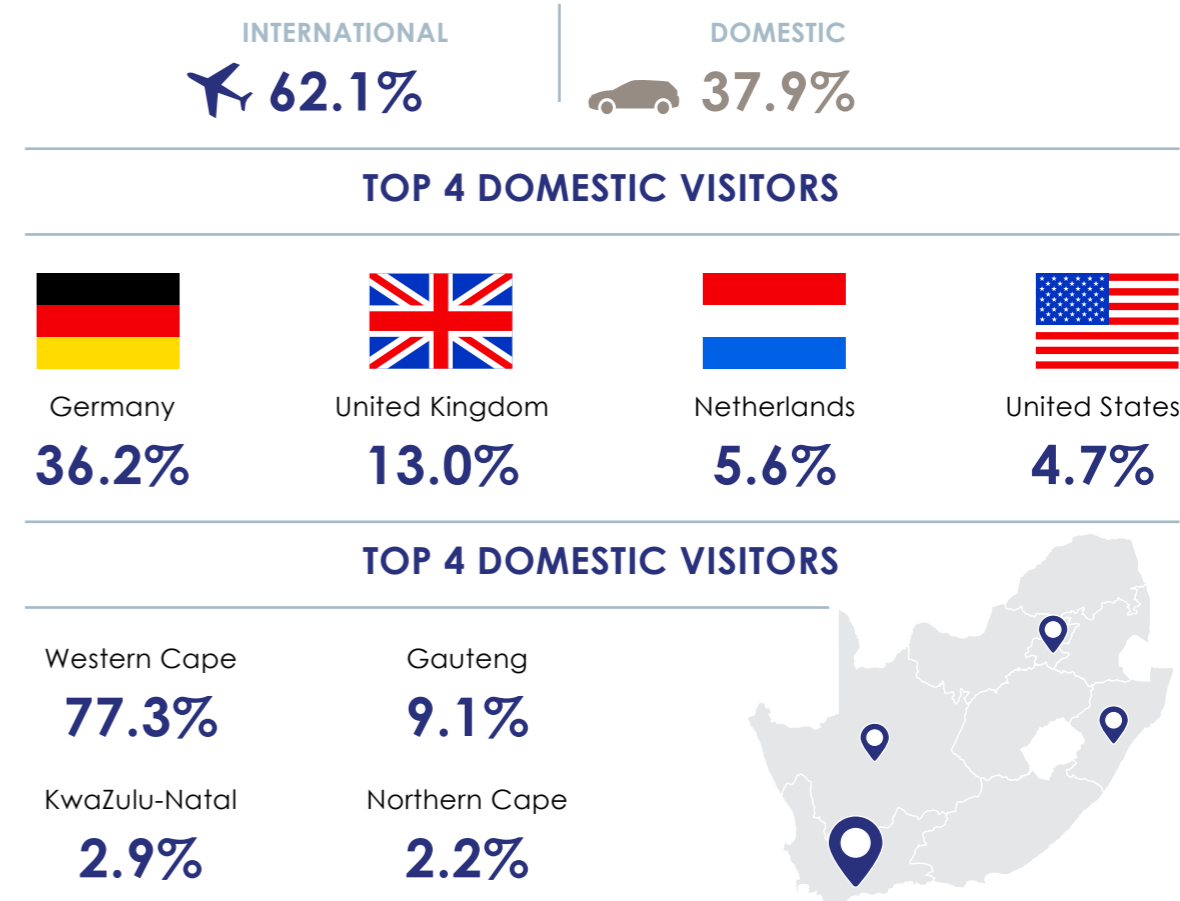
Figure 75
MODE OF TRANSPORT USED TO EXPLORE, West Coast District, 2023



Source: Wesgro, 2024

Domestic tourists made up the majority of the region's visitors, accounting for 62.1 per cent of the total, while international tourists comprised the remaining. Among the domestic tourists, 77 per cent were from Western Cape, 9.1 per cent from Gauteng, 2.9 per cent from Kwazulu-Natal, and 2.2 per cent from Northern Cape. On the international front, the largest groups of visitors came from Germany (36.2 per cent), the UK (13 per cent), Netherlands (5.6 per cent), and US (4.7 per cent), indicating a strong local appeal, with potential for growth in attracting more international visitors.

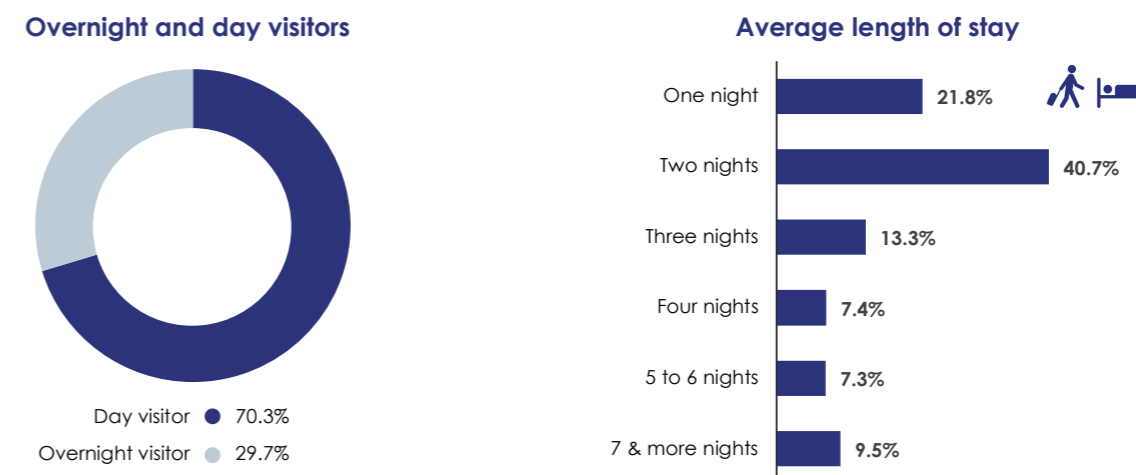
Figure 76
DOMESTIC AND INTERNATIONAL VISITORS, West Coast District, 2023



Source: Wesgro, 2024

Data on the duration of stay for visitors in the West Coast indicates that the majority of visitors stay for at least two nights (40.7 per cent) or one night (21.8 per cent). Additionally, 2023 data shows that nearly 70.3 per cent of visitors to the WCD opted for day visits, while 29.7 per cent preferred overnight stays. The average length of stay is a critical factor in understanding tourist behaviour and the region's appeal for extended vacations.

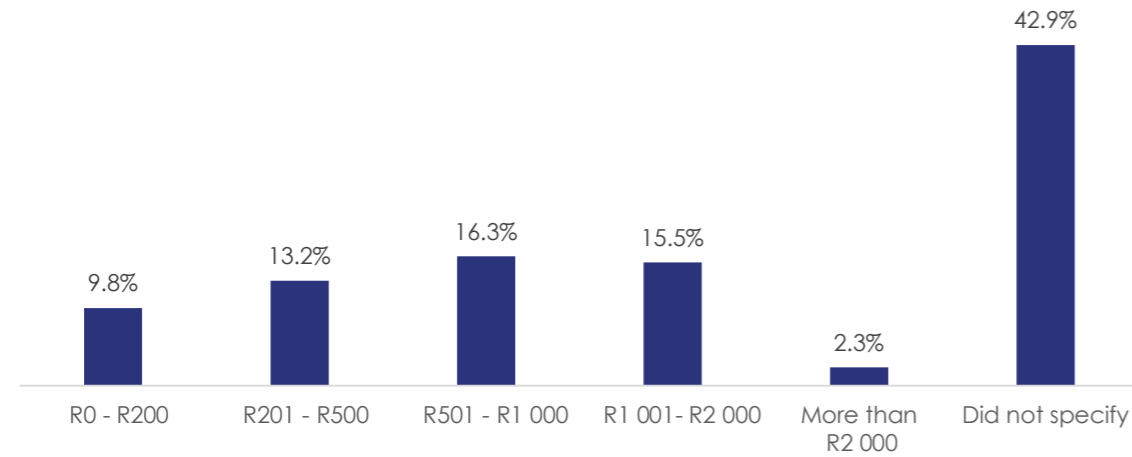
Figure 77
VISITOR DURATION OF STAY, West Coast District, 2023



Source: Wesgro, 2024

The average daily expenditure of visitors in the WCD presents an interesting insight into tourist spending patterns, despite the lack of responses among 42.9 per cent of the survey respondents. On average, 15.5 per cent of visitors spent R1 001 and R2 000 per day, with 2.3 per cent of visitors spending more than R2 000 per day. The duration of a traveller's visit significantly influences their spending habits; those on longer trips are more likely to indulge in local experiences and spend more, thereby contributing to the local economy and boosting business for tourism-related establishments.

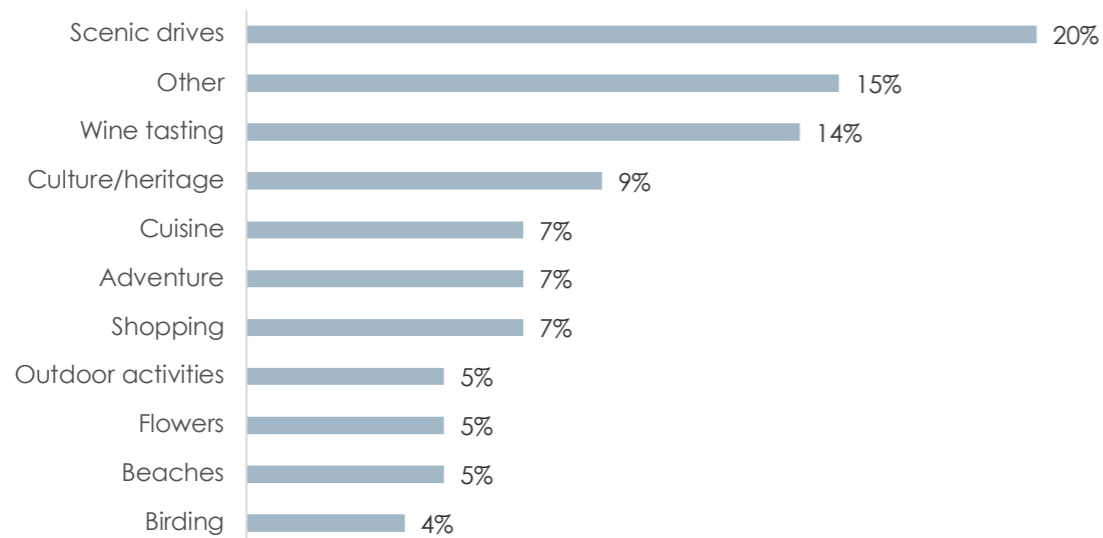
Figure 78
AVERAGE DAILY SPEND, West Coast District, 2023



Source: Wesgro, 2024

Tourists enjoy a variety of activities, with the top activities including taking scenic drives, wine tasting, visiting cultural heritage sites, trying different cuisines, experiencing adventure, and shopping.

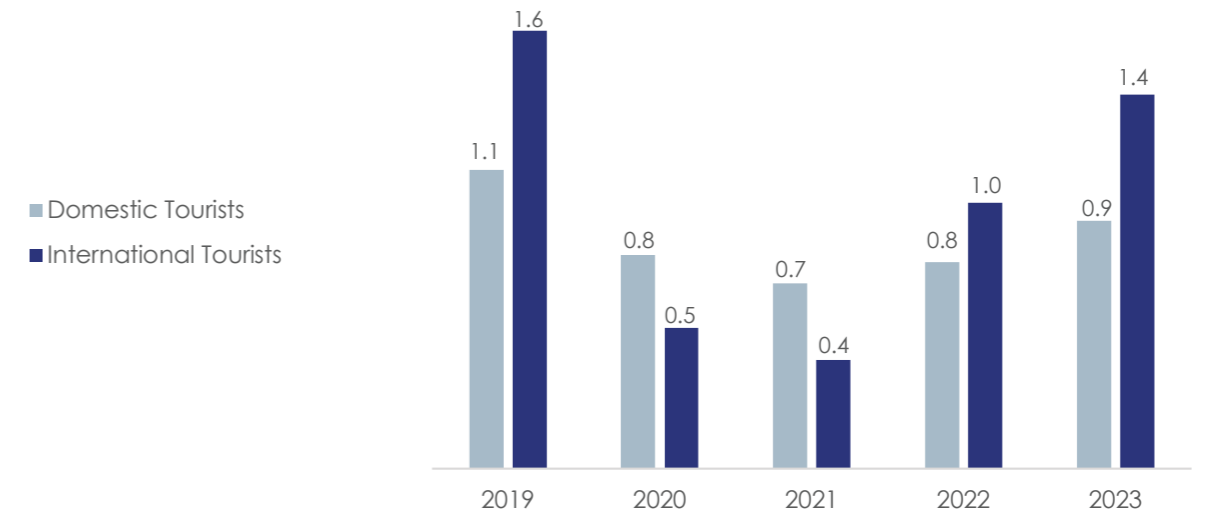
Figure 79
TOP ACTIVITIES UNDERTAKEN, West Coast District, 2023



Source: Wesgro, 2024

The total number of bed-nights in WCD have increased quite considerably between both domestic and international tourists in 2023. Domestic tourists' bed-nights rose from 750 251 in 2022 to 899 624 in 2023, marking a substantial growth rate of approximately 19.9 per cent. Similarly, international tourists' bed-nights increased from 965 832 in 2022 to 1.4 million in 2023, reflecting a growth rate of 40 per cent. This notable rise in bed-nights indicates the District's increasing attractiveness as a travel destination and its ability to draw more tourists. This growth is important for boosting the local hospitality industry and economy.

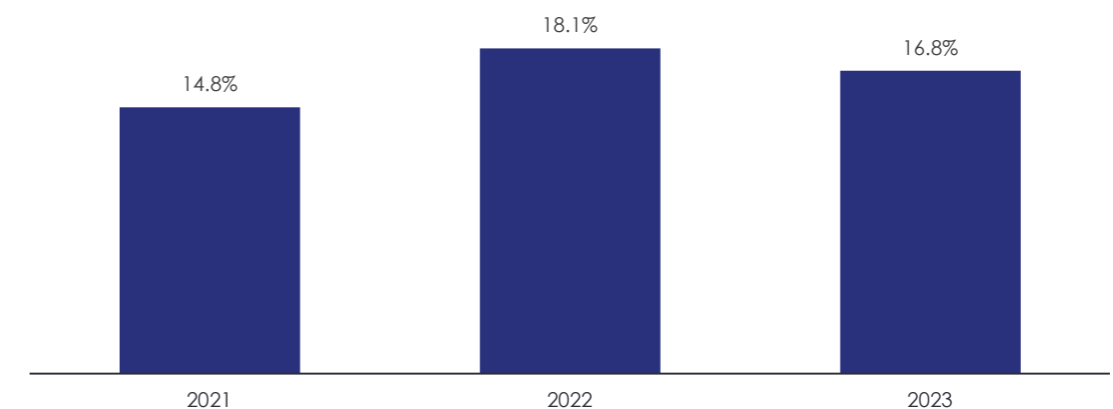
Figure 80
BED-NIGHTS (IN MILLIONS), West Coast District, 2023



Source: S&P Global Market Intelligence, 2024

In 2023, tourist spending as a share of GDP experienced a slight contraction of 1.2 percentage points compared to 2022, reaching 16.8%. However, this figure represents a notable improvement from 2021, when it was only 14.8%. Tourism plays a vital role in the economy of the Saldanha Bay municipal area. The seasonal nature of tourism, characterised by increased visitor volumes during the flower season and the December holidays, significantly influences both the tourism industry and the local economy.

Figure 81
TOURIST SPEND AS A SHARE OF GDP (CURRENT PRICES), West Coast District, 2023



Source: S&P Global: Market Intelligence, 2024

INVESTMENT

Within the Western Cape Province both the public and private sectors are pivotal, as they fulfil interdependent functions that propel economic advancement and progress within the Province. The public sector's investment is key to establishing a conducive environment that attracts private sector participation, through its commitment to infrastructure, education, and healthcare, which in turn cultivates a healthy, productive and skilled workforce.

Fundamentally, the public sector's investment forms the bedrock, upon which the private sector's investment spurs onward growth and development. Private sector investment is then vital for economic growth and diversification as well as employment creation through bringing in fresh capital, new technology, and specialised knowledge. Therefore, a coordinated strategy that integrates the strengths of both sectors is important for the continuous and sustainable economic advancement.



Public sector investment

In the 2024/25 fiscal year, the capital expenditure budget of the WCD decreased to R10.5 million, down from R38.5 million in 2023/24. A significant reduction of R3.5 million was noted in the budget for economic and environmental services. This decline is attributed to the WCG collecting less tax revenue, resulting in budget constraints that have made it challenging for local governments to allocate sufficient funds for planning and development.

Table 5
BUDGETED CAPITAL EXPENDITURE, West Coast District, 2024/25

DESCRIPTION R million	Matzikama	Cederberg	Bergriver	Saldana Bay	Swartland	West Coast District
Municipal governance and administration	R0.7	R1.5	R3.3	R34.1	R4.5	R3.2
Executive and council	R0.0	R0.0	R0.0	R0.0	R1.3	R1.1
Finance and administration	R0.7	R1.5	R3.3	R34.1	R3.2	R2.1
Internal audit	R0.0	R0.0	R0.0	R0.0	R0.0	R0.0
Community and public safety	R1.4	R16.5	R6.4	R15.9	R24.9	R3.7
Community and social services	R0.0	R10.2	R0.8	R3.6	R1.1	R1.1
Sport and recreation	R1.4	R0.0	R4.7	R6.6	R20.9	R1.0
Public safety	R0.0	R0.5	R0.9	R5.2	R2.9	R1.4
Housing	R0.0	R5.9	R0.0	R0.6	R0.0	R0.0
Health	R0.0	R0.0	R0.0	R0.0	R0.0	R0.2
Economic and environmental services	R33.4	R2.5	R13.2	R76.2	R157.0	R0.1
Planning and development	R0.1	R0.5	R4.4	R9.1	R24.8	R0.1
Road transport	R33.3	R2.0	R8.8	R67.1	R132.1	R0.0
Environmental protection	R0.0	R0.0	R0.0	R0.0	R0.0	R0.0
Trading services	R13.6	R60.0	R52.7	R200.7	R190.1	R3.5
Energy sources	R2.7	R15.4	R25.5	R61.6	R67.7	R0.0
Water management	R2.3	R20.4	R12.8	R43.2	R49.9	R3.5
Waste water management	R2.6	R21.7	R12.7	R88.9	R39.4	R0.0
Waste management	R6.1	R2.5	R1.7	R6.9	R33.1	R0.0
Other	R0.0	R0.0	R0.0	R0.0	R0.0	R0.0
Total infrastructure spend	R49.1	R80.6	R75.6	R326.9	R376.5	R10.5
Infrastructure spend as a percentage of GDP	1.2%	2.1%	1.8%	3.5%	4.8%	0.0%

Source: National Treasury, 2024

Among the municipalities, Swartland recorded the highest increase in capital expenditure, with an impressive 80 per cent growth to R376.4 million in 2024/25. This substantial increase is attributed to Swartland's strategic position along the N7 route, which makes it a vital transport corridor. Investments in road transport are aimed at improving connectivity to major markets and urban centres, thereby facilitating trade and commerce and boosting the local economy.

Saldanha Bay recorded an expenditure of R184.6 million for 2024/25. A significant portion of this expenditure is allocated to trading services, including energy sources, water, and waste management. Notable projects in this municipality include bulk sewer and pump station upgrades in Laingville, the construction of a bulk sewer line in Olifantskop, Langebaan, and upgrades to the Wastewater Treatment Works (WWTW) in both Langebaan and Vredenburg. Additionally, the municipality is constructing additional reservoirs in Olifantskop, Langebaan, and Laingville. Other significant projects include the construction of Perron Street in Louwville, Vredenburg, and the extension of the taxi rank in Vredenburg, all of which are expected to enhance infrastructure and service delivery.

Cederberg also increased its budget for 2024/25 to R80.6 million, with a focus on trading services, particularly energy sources and water and wastewater management. Key infrastructure developments in this municipality include the road infrastructure upgrade in Graafwater, which involves the paving of roads and the creation of jobs. Additionally, the municipality, in collaboration with Eskom, is upgrading the electrical distribution system by building a substation and new distribution infrastructure to stabilise the electrical supply from the Graafwater substation, ensuring stable electricity for businesses. Furthermore, there are ongoing upgrades to roads and stormwater systems in Citrusdal, aimed at improving the overall infrastructure and living conditions in the area.

Bergrivier, spending R75.6 million, concentrates on trading services, particularly energy sources, and economic and environmental services, focusing on road transport and planning and development. Matzikama, with the lowest total spend of R49.1 million, still invests significantly in road transport and trading services, particularly waste management.

Despite these significant strides, constraints still exist that negatively impact local businesses and the municipal economy. Unstable employment within the project management unit of the municipality has resulted in projects not being completed within designated timeframes. Additionally, there is a shortage of industrial properties and unserviced stands, which are not attractive to investors. Furthermore, low water quality and poor water supply in Clanwilliam and Lambertsbay continue to negatively impact the food production industry and the agricultural sector in the region. These challenges highlight the need for continued investment and strategic planning to address these issues and support sustainable economic growth.

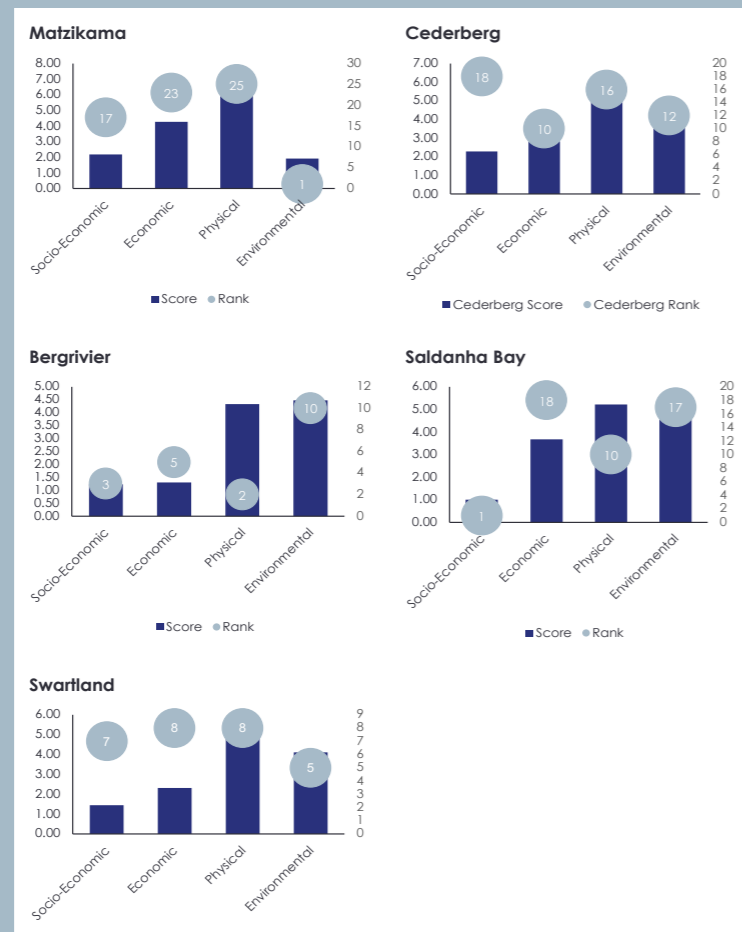
ENVIRONMENTAL RISK AND VULNERABILITY

The CSIR developed vulnerability index for all 25 municipalities in the Western Cape to assess their vulnerability in four areas – socio-economic, economic, physical and environmental. The analysis reveals that the municipal areas in the WCD are particularly vulnerable to physical and environmental factors.

- Matzikama and Cederberg face significant socio-economic and economic challenges, with Matzikama also having the highest physical vulnerability. However, Matzikama has the lowest environmental vulnerability, indicating effective environmental management.
- Bergrivier stands out with low socio-economic, economic, and physical vulnerabilities, suggesting favourable household conditions, a stable economy, and well-connected settlements. However, it has moderate environmental vulnerability.
- Saldanha Bay has the lowest socio-economic vulnerability, indicating very favourable household conditions, but faces high economic and environmental vulnerabilities, suggesting challenges in economic stability and environmental management.
- Swartland shows relatively low socio-economic and environmental vulnerabilities, indicating favourable household conditions and effective environmental management. It has moderate economic and physical vulnerabilities, suggesting some resilience to economic shocks and challenges related to settlement connectivity.



Figure 82
ENVIRONMENTAL VULNERABILITY RANK AND SCORE, West Coast District, 2021



Source: CSIR Greenbook, 2021. Note: Local municipalities are ranked according to their vulnerability relative to all 25 municipalities in the province (Rank). A higher ranking (out of 25) indicates the municipality is comparatively worse off. An additional score (out of 10) is provided for vulnerability factors relative to all 213 municipalities in the country (Score)

To better understand the Province's environmental vulnerabilities, the Department of Environmental Affairs and Development Planning (DEADP) initiated a project aimed at tracking the environmental vulnerabilities and risks in the Western Cape, with a particular focus on water security and the impacts of climate change.

The project is aimed at developing an environmental risk map that highlights areas in the Western Cape where compound risks threatened people, their livelihoods and/or infrastructure. The risk maps can then be leveraged to provide insights that can support decision-making, planning and budgeting related to sustainable economic growth and enhance human wellbeing.

The thematic areas contributing to the final combined environmental risk and vulnerability maps include:

- Ecosystem Deterioration
- Coastal Erosion and Flooding
- Terrestrial Flooding
- Water Security
- Air Quality and Health
- Solid Waste Management
- Wildfires

The analysis by the Province indicates that the WCD is vulnerable to several environmental risks. Ecosystem deterioration concerns are most prevalent on the West and Southern coasts. This includes the sensitivity of the remaining natural areas and the complexity of managing these sensitivities alongside diverse human

Future drying adds to the water security risk in the West. Water scarcity can lead to conflicts over resources, reduced agricultural productivity, and economic losses. Contaminated water can pose serious health risks. Medium-term Expenditure Framework

The table below reflects the Western Cape Government's WCG's investment in infrastructure expansions within the WCD for 2024/25, highlighting the Provincial Government's priority areas over the three-year period. The Medium-Term Expenditure Framework (MTEF) underscores a commitment to enhancing infrastructure to facilitate the efficient functioning of the WCD, with a significant budget of R5.6 billion to fund 206 projects.

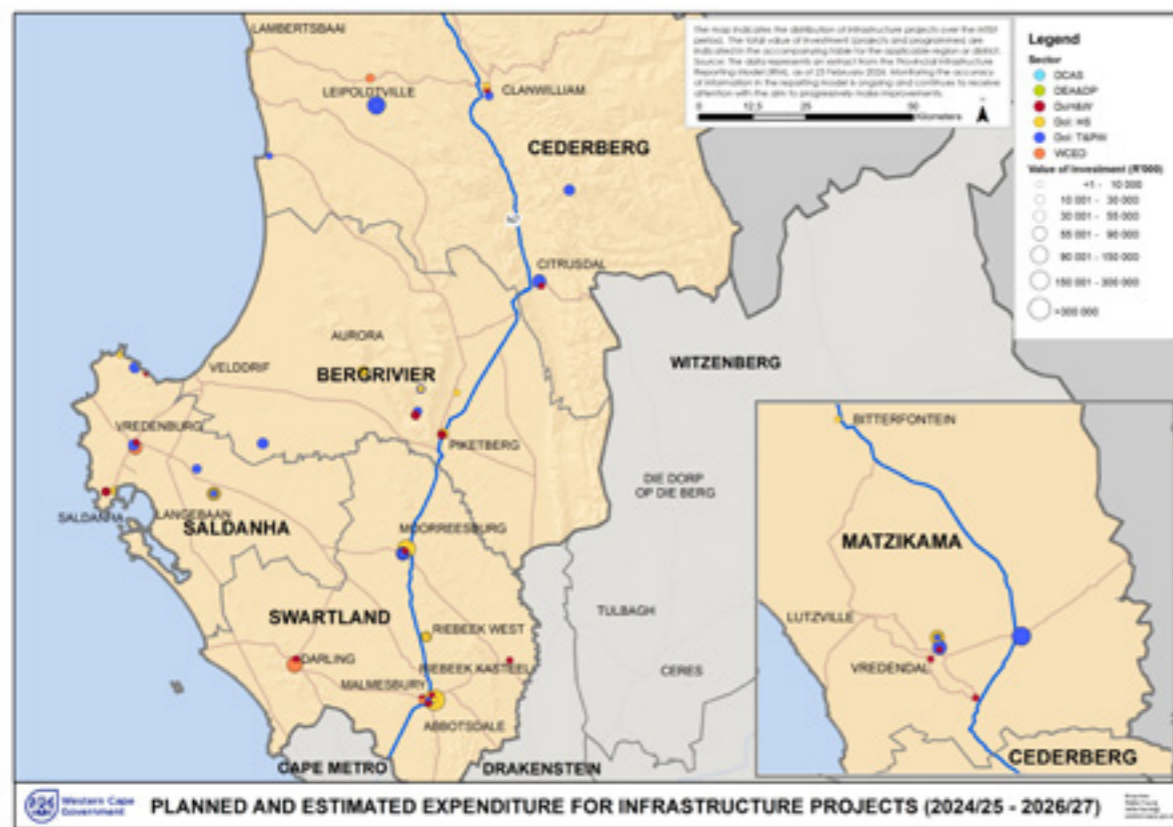
Transport and Public Works contributed 51.5 per cent of the MTEF budget, equal to R2.9 billion. The region's economy depends heavily on efficient transport for trade, especially in the agriculture and tourism sectors. Enhanced road infrastructure attracts investment and bolsters local businesses. Key projects include the Infrastructure C802.5 project in St Helena - Stompneusbaai Phase 2 is dedicated to the rehabilitation, renovations, and refurbishment of the transport infrastructure in the area.

Health and Wellness contributed 43.8 per cent (R2.5 billion) to ensure continued access to health facilities for WCD citizens. Human Settlements followed with 2.9 per cent of R163 million to address the growing demand for housing in the WCD. Key initiatives include the Swartland project in Malmesbury, specifically the De Hoop (3 036 of 4 600) phase 2 with a budget of R395.4 million. This project aims to enhance access to housing. Lastly, Environmental Affairs and Development Planning contributed R101.7 million to assist with ensuring investment in climate mitigation and adaptation interventions alongside safeguarding against broader environmental concerns.

Table 6
TOTAL DEPARTMENTAL MTEF BUDGET AND NUMBER OF PROJECTS. West Coast District, 2024/25 – 2026/27

WC Provincial Department	No. of Projects & Programmes	2024/25 MTEF (R'000)	2024/26 MTEF (R'000)	2026/27 MTEF (R'000)	MTEF Total (R'000)
Education	0	0	0	0	0
Health and Wellness	77	796 153	857 425	808 235	2 461 813
Human Settlement	4	98 500	64 500	0	163 000
Transport and Public Works	105	1 014 277	1 042 863	832 392	2 889 532
Environmental Affairs and Development Planning	20	21 124	56 438	24 157	101 719
Total	206	1 930 054	2 021 226	1 664 784	5 616 064

Source: Western Cape Provincial Treasury



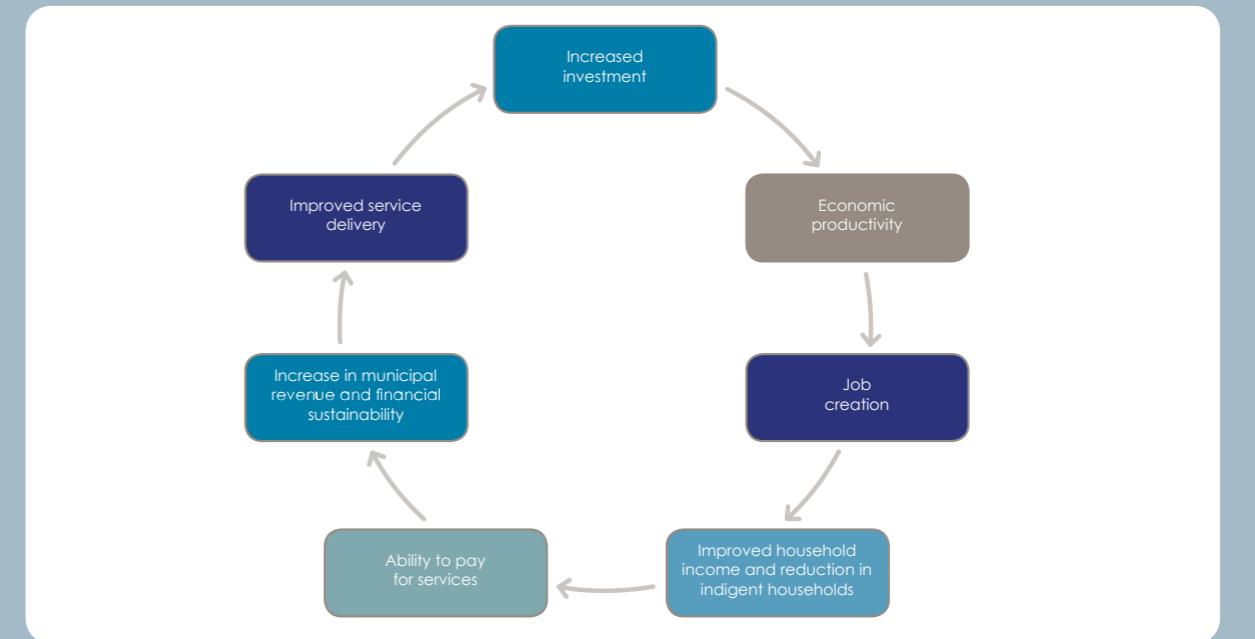
FINANCIAL SUSTAINABILITY AND GOOD GOVERNANCE: A KEY LEVER FOR INFRASTRUCTURE DEVELOPMENT

Traditionally, municipal capital budgets are funded from (i) conditional grants, (ii) internally generated revenue and (iii) borrowing. Conditional grants remain the primary source of capital funding, followed by internally generated funds and lastly borrowing. Over the past few years, the role of borrowing for capital funding is becoming more prominent as capital transfers have remained static and internally generated funds have contracted.

However, their financial resources are often limited by constrained revenue streams and rising operational costs. Traditional financing sources, such as service charge revenues and government grants, are proving insufficient to meet the required scale of investment. As a result, it has become critical to explore alternative financing options, including public-private partnerships, bonds, and other innovative funding structures.

A compelling case for alternative financing mechanisms, especially for infrastructure development, is gaining traction in the context of growing demand for public infrastructure against the financial constraints faced by municipalities. Municipalities are under mounting pressure to address infrastructure backlogs and expand capacity to accommodate both population growth and economic development, while maintaining resilience against environmental challenges.

Financial sustainability provides access to capital markets leverage for negotiations, and reduces reliance on constrained government grants. Furthermore, sustainable financial management allows for better long-term planning and investment in infrastructure. Municipalities with strong financial foundations can prioritise projects based on strategic needs rather than short-term financial constraints, leading to more resilient and future-proof infrastructure.



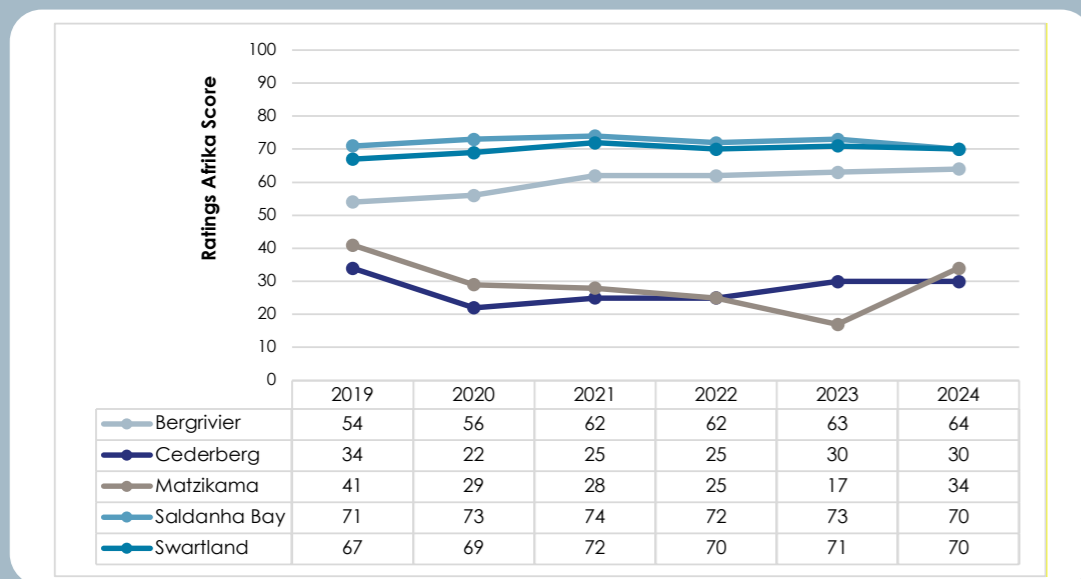
The chart represents the virtuous cycle of economic growth and prosperity for municipalities.

Financial sustainability and good financial governance play a critical role in enhancing a municipality's ability to secure alternative financing. Ratings Afrika defines financial sustainability as "the financial ability of a municipality to deliver services and to develop and maintain the infrastructure required by its residents without unplanned increases in rates and tariffs, or a reduction in the level of services. Furthermore, without external financial assistance, the municipality should be able to absorb financial shocks caused by natural, economic, political, and other disasters, such as COVID-19."

In line with this definition, Ratings Afrika developed a Municipal Financial Sustainability Index (MFSI). The MFSI measures the operating performance, liquidity management, debt governance, budget position, and infrastructure development of local municipalities in South Africa, scoring each component out of 100. The Index can be used by municipalities in their decision-making, to improve financial sustainability.

Municipalities that score higher on this index demonstrate stronger financial management, which is crucial in attracting investors and securing favourable financing terms for infrastructure projects.

Figure 83
RATINGS AFRIKA MUNICIPAL FINANCIAL SUSTAINABILITY INDEX, West Coast District, 2019-2024



Source: Ratings Afrika Municipal Financial Sustainability Analysis, December 2023

The Ratings Afrika Financial Sustainability scores for the WCD reveal varying trends among municipalities, with significant implications for infrastructure provision and the regional economy. Bergrievier and Cederberg have experienced modest increases, with Bergrievier improving steadily from 54 in 2019 to a projected 64 in 2024, indicating a stable financial position that could support ongoing infrastructure investment. However, Cederberg, despite a slight improvement from 22 in 2020 to 30 in 2024, remains low, which may hinder its ability to maintain and expand infrastructure.

Matzikama has shown fluctuations, with a decline from 41 in 2019 to 17 in 2023, followed by a projected recovery to 34 in 2024. This instability may impact its infrastructure quality and economic growth. Saldanha Bay and Swartland have maintained relatively high and stable scores, suggesting strong financial resilience and a positive outlook for infrastructure support.

However, the overall score for the West Coast District is projected to drop from 79 in 2023 to 61 in 2024, which is concerning. This decline potentially indicates financial strain that could affect regional infrastructure projects and economic stability. The reduction may reflect budgetary constraints impacting service delivery and economic momentum in the area.

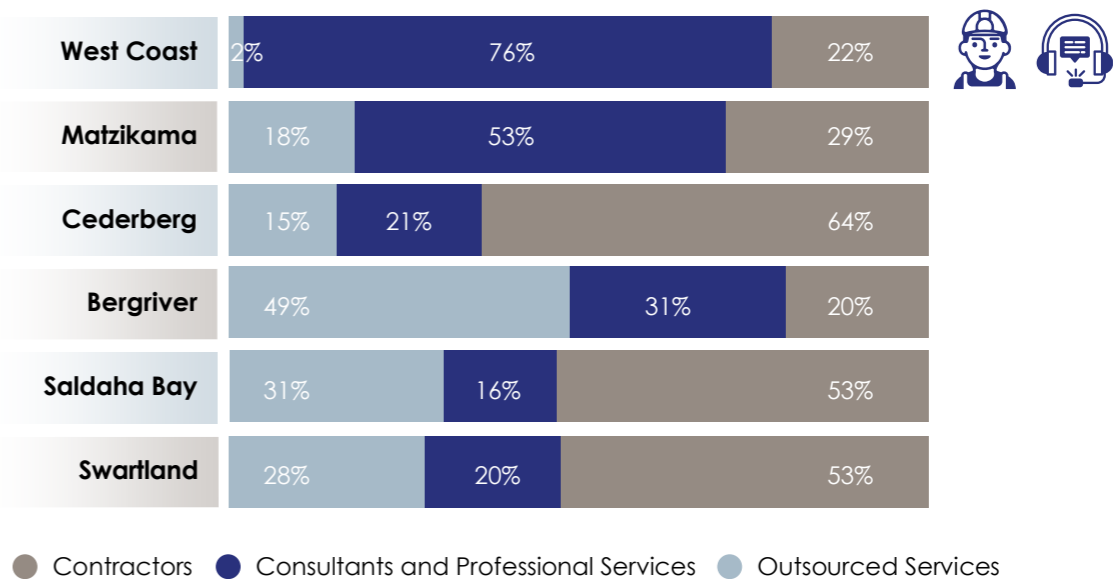
While alternative financing is essential to address immediate infrastructure needs, financial sustainability ensures that municipalities can attract investment and secure financing on favourable terms. Financially stable municipalities are better positioned to meet both current and future infrastructure demands, fostering a virtuous cycle of economic growth and prosperity.

Public sector procurement

Public sector spending on contracted services enhances municipal efficiency while contributing to broader economic growth, particularly by stimulating local economic activity through the engagement of local service providers and generating employment. This approach reinforces the municipality's role as a key facilitator of economic development.

Consultants and professional services accounted for a large proportion of the procurement spend in the WCD, approximately 75.6 per cent. Among the municipalities, there are notable differences. While Matzikama had over half of procurement through consultants and professional services, the procurement spend in other municipalities was directed towards contractors and outsourced services. Among contracted services, contractors (with B-BBEE accreditation) constituted a slightly average proportion, ranging from 7.4 per cent by Bergrievier to 13.1 per cent by the WCD.

Figure 84
PROPORTION OF SPENDING ON CONTRACTED SERVICES PER MUNICIPAL AREA, West Coast District, 2023/24



Source: National Treasury, 2024

Public sector spending on designated groups

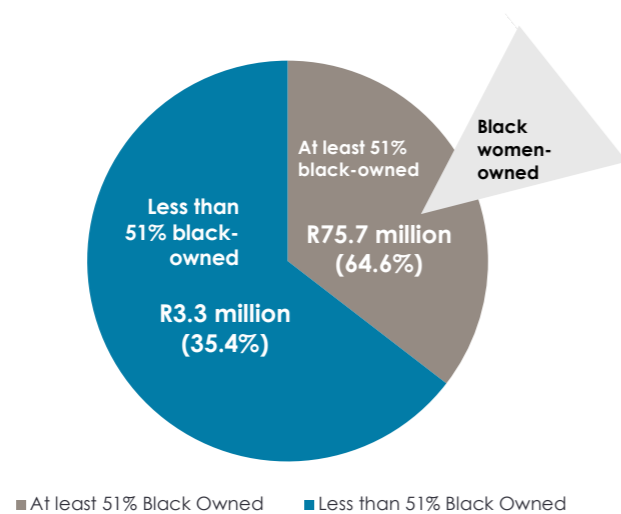
Procurement under Broad-Based Black Economic Empowerment (B-BBEE) remains a key component in the procuring of goods and services in the Western Cape. B-BBEE procurement policies are designed to incentivise companies to support economic transformation by doing business with suppliers that contribute to the empowerment of designated groups.

The section analyses how public procurement has been leveraged to support designated groups, including majority black-owned businesses, SMMEs, as well as those owned by military veterans, youth and individuals living with disabilities.

Black owned enterprise – black women involvement

During the 2023/24 fiscal year, a substantial allocation of R 75.7 million was directed towards black-owned enterprises. This investment represents 35.4 per cent of the total spending by the WCG. Amongst the 35.4 per cent majority black-owned businesses, the majority owned by black women businesses received procurement of R3.3 million. By prioritising investments in women-owned companies, the initiatives aim to redress historical gender disparities in the business landscape, ensuring that women are afforded equitable opportunities to meaningfully participate and contribute to the economy.

Figure 85
EXPENDITURE ON REGISTERED BLACK-OWNED COMPANIES, West Coast District, 2023/24



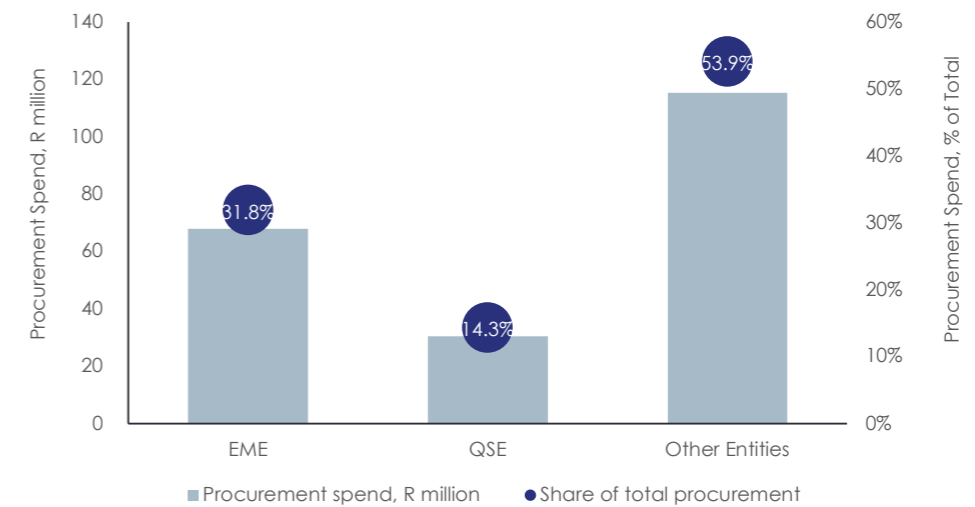
Source: Western Cape Provincial Treasury, 2024

Small and Medium-Sized Enterprises

The Western Cape is one of the most prominent entrepreneurial hubs in the country. Investment in black-owned SMMEs is prioritised by the Province to encourage inclusive growth and stimulate job creation. Such a focus supports entrepreneurship, diversifies the economy, and enhances skills development.

During the 2023/24 fiscal year, the total investment directed towards SMMEs reached R98.4 million. Exempted Micro Enterprises (EME) made up a large portion of the expenditure at R67.9 million, while Qualifying Small Enterprises (QSE) constituted a smaller share, equal to R30.4 million. This overall expenditure continues to highlight the districts commitment to supporting the growth and development of SMMEs within the broader economic landscape.

Figure 86
EXPENDITURE ON REGISTERED SMMES, West Coast District, 2023/24

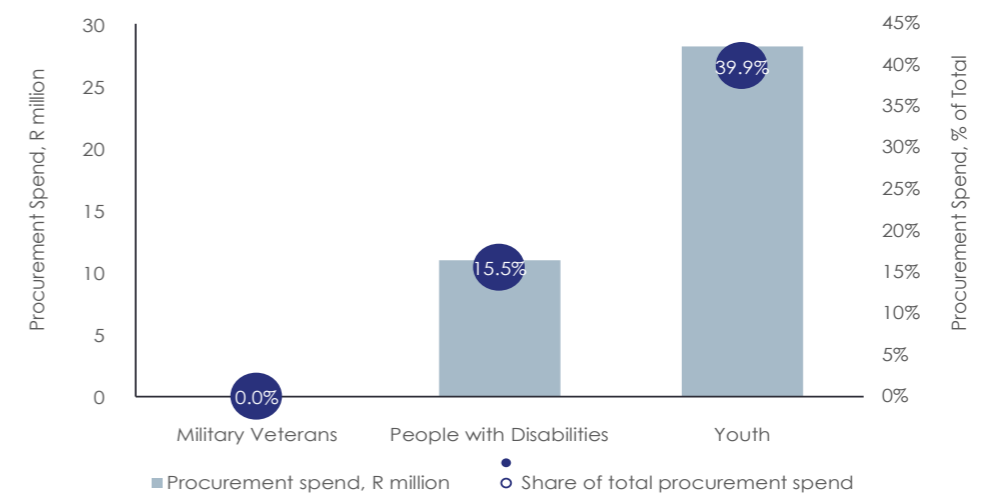


Source: Western Cape Provincial Treasury, 2024

Individuals with disabilities and the Youth

B-BBEE strategically emphasises the inclusion of youth and people with disabilities to tackle significant challenges of unemployment and marginalisation. In 2023/24, B-BBEE procurement spend by the WCG in the WCD amounted to R39.2 million for youth-owned enterprises, accounting for a substantial 39.9 per cent of the total spend. Further, R11 million was spent on businesses owned by individuals with disabilities, representing 0.9 per cent of overall spending.

Figure 87
PAYMENTS TO DESIGNATED SUPPLIERS, West Coast District, 2023/24



Source: Western Cape Provincial Treasury, 2024

Private sector investment

Private sector investment is crucial to the Western Cape Province as it drives economic growth, innovation, and job creation. A vibrant private sector can fuel innovation and help alleviate poverty. Private investment, measured by Gross Fixed Capital Formation (GFCF), represents the actual expenditure on physical assets by businesses to maintain or increase production capacity.

In 2023, an average growth rate of 3.8 per cent was recorded for GFCF. Substantial growth was recorded in the secondary industry, particularly in electricity gas and water as the economy rebounded post-COVID-19. The secondary sector contributed 24.2 per cent to GFCF in, with an overall growth of 11.8 per cent.

Investment in renewable energy plants significantly contributed to the growth GFCF in the electricity, gas, and water sector, which saw an 18.4 per cent increase. This growth is primarily driven by the district's need to meet rising demand for sustainable energy solutions and reduce reliance on Eskom. The surge in private investments in solar photovoltaic (PV) systems, battery storage, and other renewable technologies is motivated by the need for energy security and sustainability.

The tertiary sector experienced a 3.1 per cent growth and made a significant contribution to GFCF at 43 per cent. This growth was driven by businesses in the tourism industry upgrading and expanding to capitalise on the surge in tourist arrivals post-COVID. The tertiary sector's substantial contribution to GFCF underscores the importance of tourism and related services in the region's economic landscape.

Conversely, the primary sector experienced a 0.7 per cent decline in growth due to factors such as the region's arid climate, low rainfall, and increased production costs. These challenges have led to reduced agricultural yields and significant financial burdens for farmers, further exacerbated by climate change and load shedding. The inability to generate revenue and repay debt following substantial losses in agricultural output has created a precarious situation for the agricultural sector, necessitating urgent attention and intervention.

Table 7
GROSS FIXED CAPITAL FORMATION PER SECTOR, West Coast District, 2022-2023

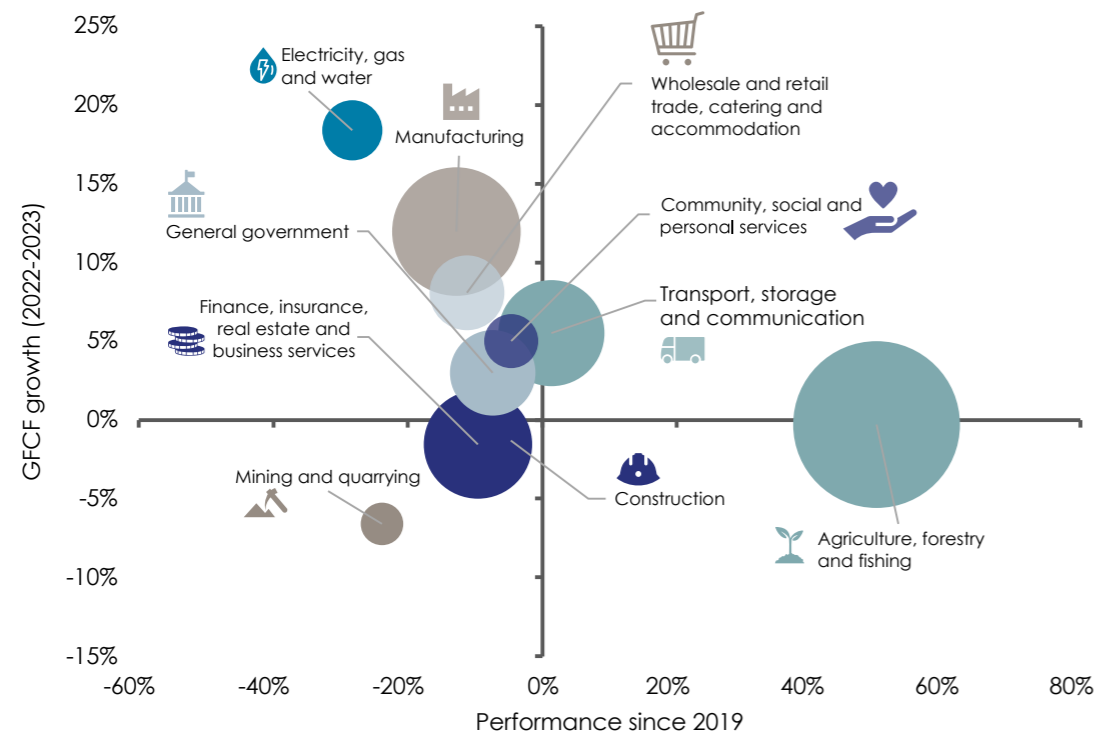
Sector	2022 R million	GFCF growth (2022-2023)
Primary sector	1 617.0	-0.7%
Agriculture, forestry and fishing	1 512.1	-0.3%
Mining and quarrying	104.9	-6.6%
Secondary sector	1 059.6	11.8%
Manufacturing	800.2	12.0%
Electricity, gas and water	165.8	18.4%
Construction	93.5	-1.3%
Tertiary sector	2 041.6	3.1%
Wholesale and retail trade, catering and accommodation	280.9	8.1%
Transport, storage and communication	578.1	5.5%
Finance, insurance, real estate and business services	646.9	-1.5%
General government	385.0	3.0%
Community, social and personal services	150.7	5.0%
West Coast	4 718.1	3.8%

Source: Quantec, 2024

An analysis of the sectoral contributions to GFCF and performance since 2019 reveals that investment levels are struggling to recover to pre-2019 levels across most sectors. However, agriculture, forestry, and fishing sector stands out as an exception. This sector has shown remarkable resilience and has rebounded the most since the COVID-19 pandemic, with a performance increase of 36.2 per cent. Despite this impressive recovery, it is important to note that there was a slight decline of 0.3 per cent in GFCF growth from 2022 to 2023. This indicates that while the sector has made significant strides, it still faces challenges in maintaining consistent growth in investment levels.



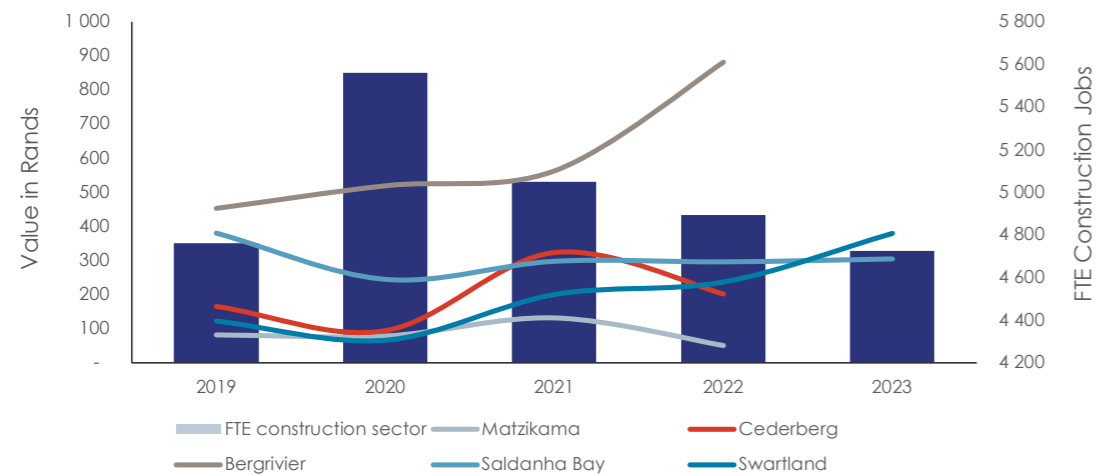
Figure 88
GROSS FIXED CAPITAL FORMATION, West Coast District, 2022-2023



Source: Quantec, 2024

Looking at the number of building plans approved and completed is a useful leading indicator for infrastructure investments. Notably, there are significant variations in the value of buildings completed across different municipalities. Bergrivier and Swartland have been on an upward trajectory, while the other municipal areas recorded in 2023, from R218 million in 2022 to R245 million in 2023. The overall number of FTEs in the construction sector has remained relatively stable over the five-year period. In the last year, the number of FTE construction jobs increased by 3 per cent.

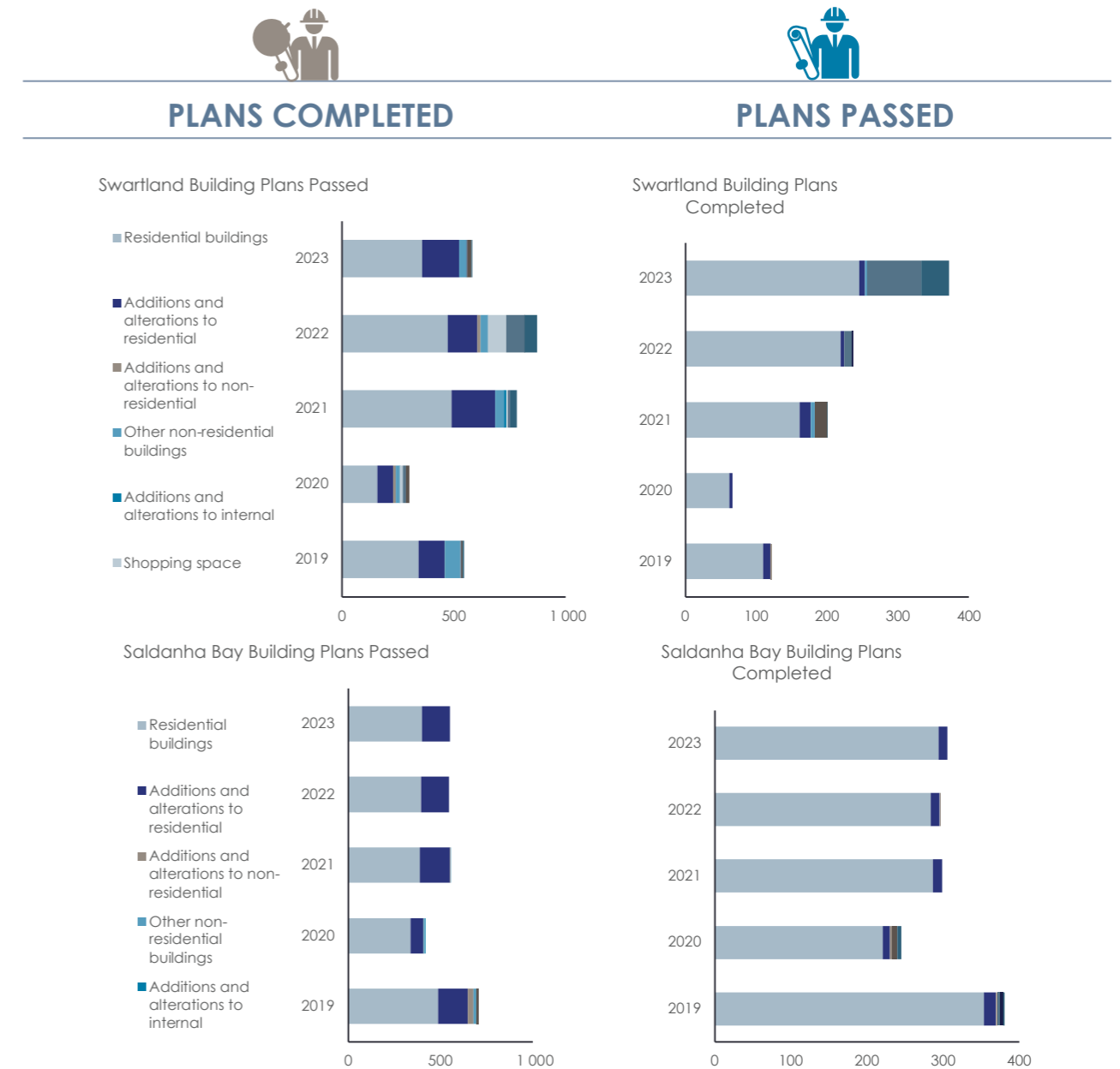
Figure 89
TOTAL VALUE OF BUILDING PLANS COMPLETED & CONSTRUCTION SECTOR FTE JOBS, West Coast District, 2019 – 2023 (R million)



Source: Quantec, 2024

Residential buildings constitute a significant portion of building plans completed and approved in Swartland and Saldanha Bay. This trend is largely attributed to a strong net inflow of skilled labour, a favourable economic climate, an attractive coastal lifestyle, and a reputation for good governance. However, Swartland and Saldanha faces a challenge with a recent decrease in both building plans completed and approved, leading to backlogs in housing development.³⁷

Figure 90
VALUE OF BUILDING PLANS PASSED AND COMPLETED, West Coast District, 2023 (R million)



Source: Quantec, 2024

The growth and functioning of any sector is deeply rooted in infrastructure development, which remains a key component of GFCF. Infrastructure investments in roads, bridges, railways, and communication networks are essential for the efficient flow of goods and services. The WCD municipalities prioritise infrastructure development to accommodate anticipated population growth and ensure efficient service delivery.

³⁷ Approved building plans are the designs that are allowed before starting to build, while completed building plans are the final drawings made for the project.

Concluding remarks

In 2023, the WCD recorded an economic growth of -0.6 per cent as the municipal areas navigated a set of challenges across its municipalities. The WCD's economy faced several external challenges in 2023, including climate-related risks, loadshedding, and global market fluctuations. Severe weather events, such as storms and flooding, adversely affected agricultural output, particularly in Matzikama and Bergrivier. Loadshedding and increased input costs also impacted manufacturing and agricultural productivity across the district. Despite these challenges, the District demonstrated resilience, with strong performances in key sectors such as finance, manufacturing, and transport. The district also saw an increase in migration from metropolitan areas, driven by the growing trend of remote work, which stimulated demand for housing, local services, and infrastructure.

Despite the negative growth, the District recorded a net increase of 10 460 jobs in 2023, marking a continued recovery from the pandemic's negative impact on employment in 2020 and 2021. The agriculture sector, particularly the fruit and wine industries, alongside manufacturing, were major contributors to job creation. The District's unemployment rate improved to 14.5 per cent in 2023, down from 16 per cent in 2022, signaling steady progress in reducing unemployment and fostering greater economic stability. The employment-to-population ratio also saw a notable improvement, rising from 51.2 per cent in 2022 to 53.2 per cent in 2023, indicating that a greater proportion of the working-age population is finding employment.

Infrastructure investments are crucial for supporting economic growth and development in the WCD. In 2024/25, the capital expenditure budget in the WCD decreased to R10.5 million, down from R38.5 million in 2023/24. Despite this decrease, significant investments were made in key areas. Swartland recorded the highest increase in capital expenditure, with an impressive 80 per cent growth to R376.4 million, focusing on road transport to improve connectivity and boost the local economy. Saldanha Bay allocated a significant portion of its R184.6 million expenditure to trading services, including energy sources, water, and waste management. Cederberg increased its budget to R80.6 million, with a focus on trade services and infrastructure developments. These investments are aimed at enhancing infrastructure and service delivery, supporting economic activities, and improving living conditions.





Western Cape
Government
FOR YOU

SECTION



Safety &
wellbeing

INTRODUCTION

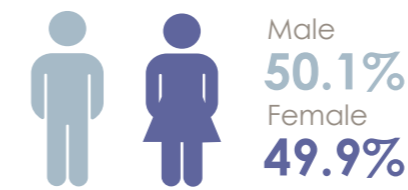
This section delves into the social trends and indicators that define the essence of the WCD. By analysing population dynamics, housing demand, essential services, household income, healthcare, education, and crime indicators, we gain valuable insights into the lives of citizens and the local economy. Population dynamics offer a glimpse into the evolving landscape of the WCD, providing a deep understanding of the social fabric and its implications for economic development, labour markets, and resource allocation.

Access to essential services such as water, electricity, sanitation, and waste removal is crucial for community well-being and progress. In addition, healthcare, educational outcomes, and crime indicators are examined to understand the broader social and economic landscape of the WCD. These pillars reflect the well-being of the community, the potential of future generations, and the challenges faced by the community. By understanding these factors, we can better address the needs of the WCD's residents and support sustainable development.

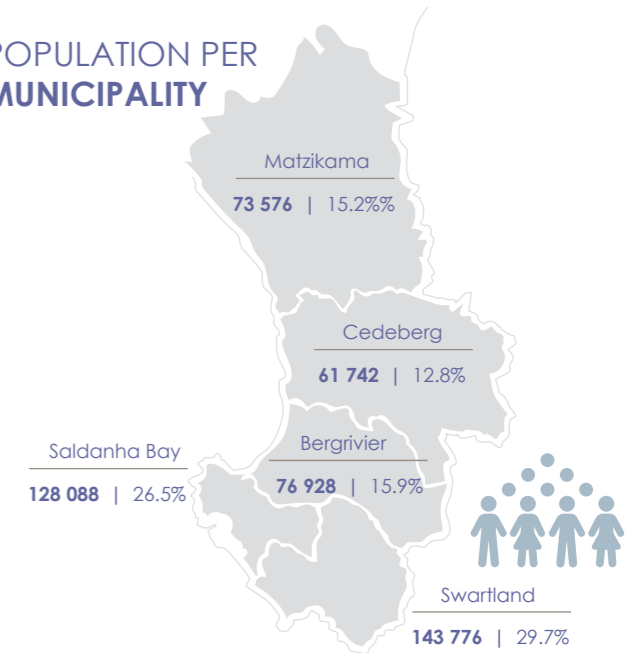
2023 WEST COAST DEMOGRAPHICS

POPULATION

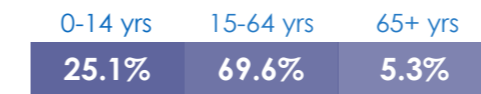
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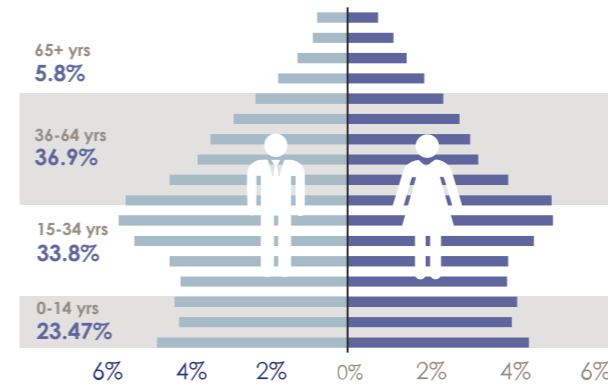
POPULATION PER MUNICIPALITY



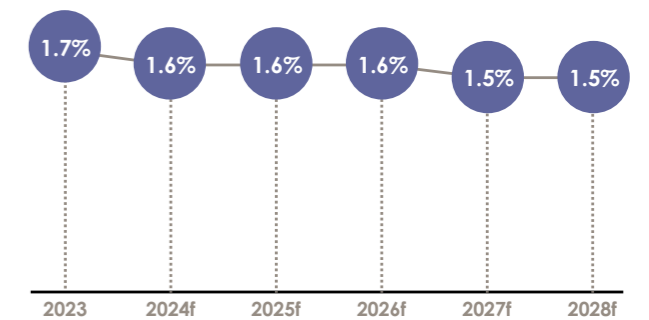
AGE SPLIT



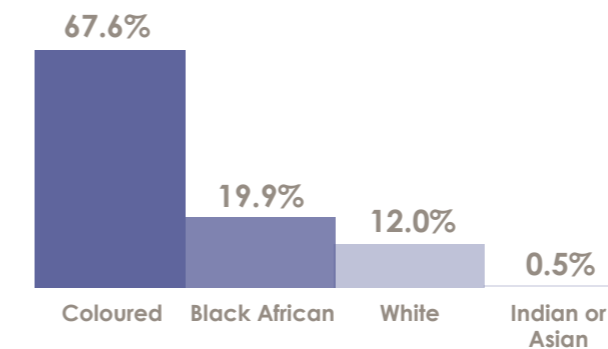
GENDER AND AGE DYNAMIC



Estimated POPULATION GROWTH



RACIAL SPLIT



Number of HOUSEHOLDS

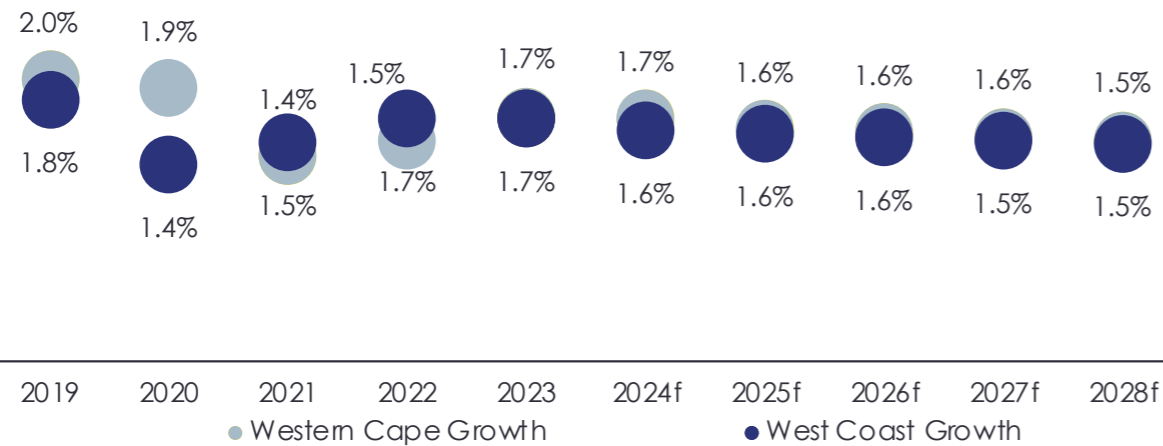
130 961

6 736 Average Median Income	24 888 Indigent Households
Number of Healthcare Facilities 29	

Demographics

The WCD makes up 6.5 per cent of the Western Cape population. This translates to a population of 484 110 in 2023, after a year-on-year growth rate of 1.7 per cent. From 2024 onwards, the WCD population is expected to grow at an average annual rate of 1.6 per cent, matching the growth projections anticipated for the Western Cape. This population growth further highlights the District's increasing appeal as a vibrant destination for residential, commercial, and tourist activities.

Figure 91
ESTIMATED POPULATION GROWTH, West Coast and Western Cape, 2019-2028f

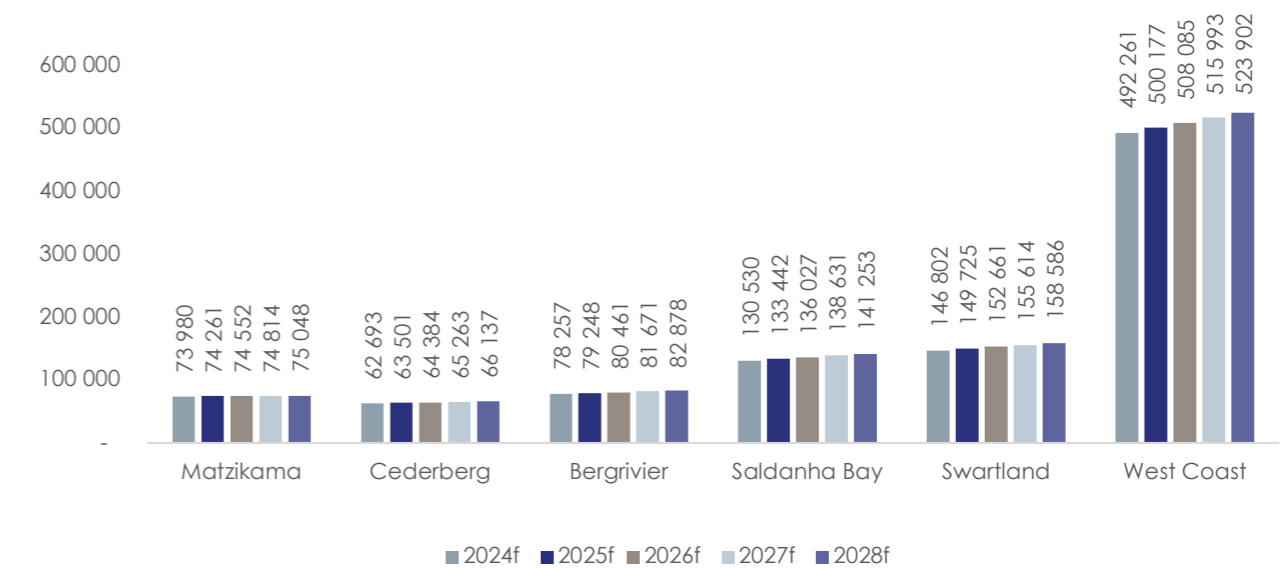


Source: Western Cape Government PPU, 2024; provincial, district and local municipality population estimates by sex and age (2002 – 2030) based on Stats SA MYPE, 2024

Swartland holds the largest share of the WCD's population, accounting for 29.2 per cent with 143 776 residents in 2023. Known for its agricultural base and expanding urban centres, Swartland is projected to experience an average growth rate of 2 per cent from 2024 to 2028. Saldanha Bay follows closely, representing 26 per cent of the population with 128 088 residents in 2023. Like Swartland, it is forecast to grow at an average rate of 2 per cent during the same period, driven by its strategic economic activities, including its port and industrial zones.

Bergrivier, contributing 15.6 per cent of the region's population with 76 928 residents in 2023, is projected to grow at a slightly slower rate of 1.5 per cent. Cederberg, comprising 12.5 per cent of the population with 61 742 residents, is anticipated to grow at 1.4 per cent. Lastly, Matzikama accounts for 14.9 per cent of the population with 73 576 residents in 2023 and has the lowest projected growth rate of 0.4 per cent anticipated for 2024. These forecasted growth rates underline the diverse demographic and economic dynamics within the municipalities, reflecting varying degrees of urbanisation and economic opportunities.

Figure 92
ESTIMATED POPULATION NUMBERS, West Coast District, 2024f – 2028f



Source: Stats SA MYPE, 2024

In 2023, WCD recorded 130 961 households following a year-on-year growth of 2.5 per cent when compared to the previous year. Saldanha Bay and Swartland accounted for most households in the WCD, representing 30.2 per cent and 26.6 per cent, respectively. This distribution reflects their roles as key economic hubs within the District. Saldanha Bay, driven by its industrial port and associated sectors, and Swartland, benefiting from its strong agricultural base and accessibility to urban amenities, attract individuals seeking employment opportunities and improved living conditions. Bergrivier and Matzikama followed with 20 079 households (15.3 per cent) and 19 862 households (15.2 per cent), respectively. Meanwhile, Cederberg, with 16 714 households (12.8 per cent), has a smaller share but remains an integral part of the District's demographic and economic fabric.

Table 8
HOUSEHOLDS, West Coast District, 2022 – 2027f

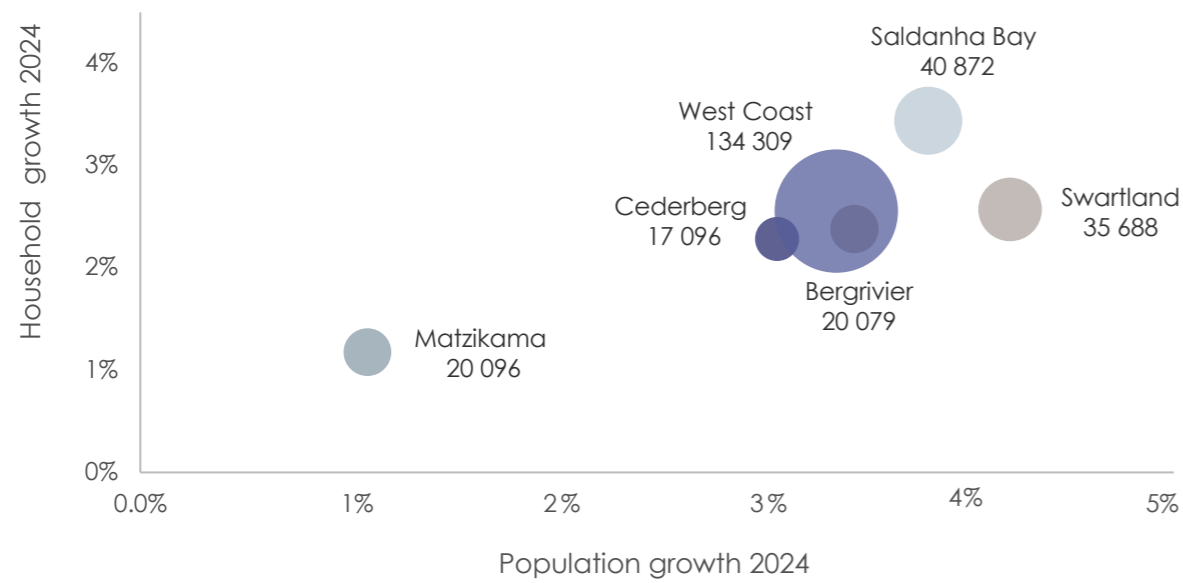
	2022	2023	2024f	2025f	2026f	2027f
Matzikama	19 630	19 862	20 096	20 328	20 550	20 771
Cederberg	16 344	16 714	17 096	17 486	17 872	18 257
Bergrivier	19 616	20 079	20 557	21 040	21 509	21 981
Saldanha Bay	38 213	39 513	40 872	42 276	43 689	45 123
Swartland	33 937	34 793	35 688	36 601	37 498	38 394
West Coast	127 739	130 961	134 309	137 731	141 119	144 525

Source: Stats SA MYPE, 2021

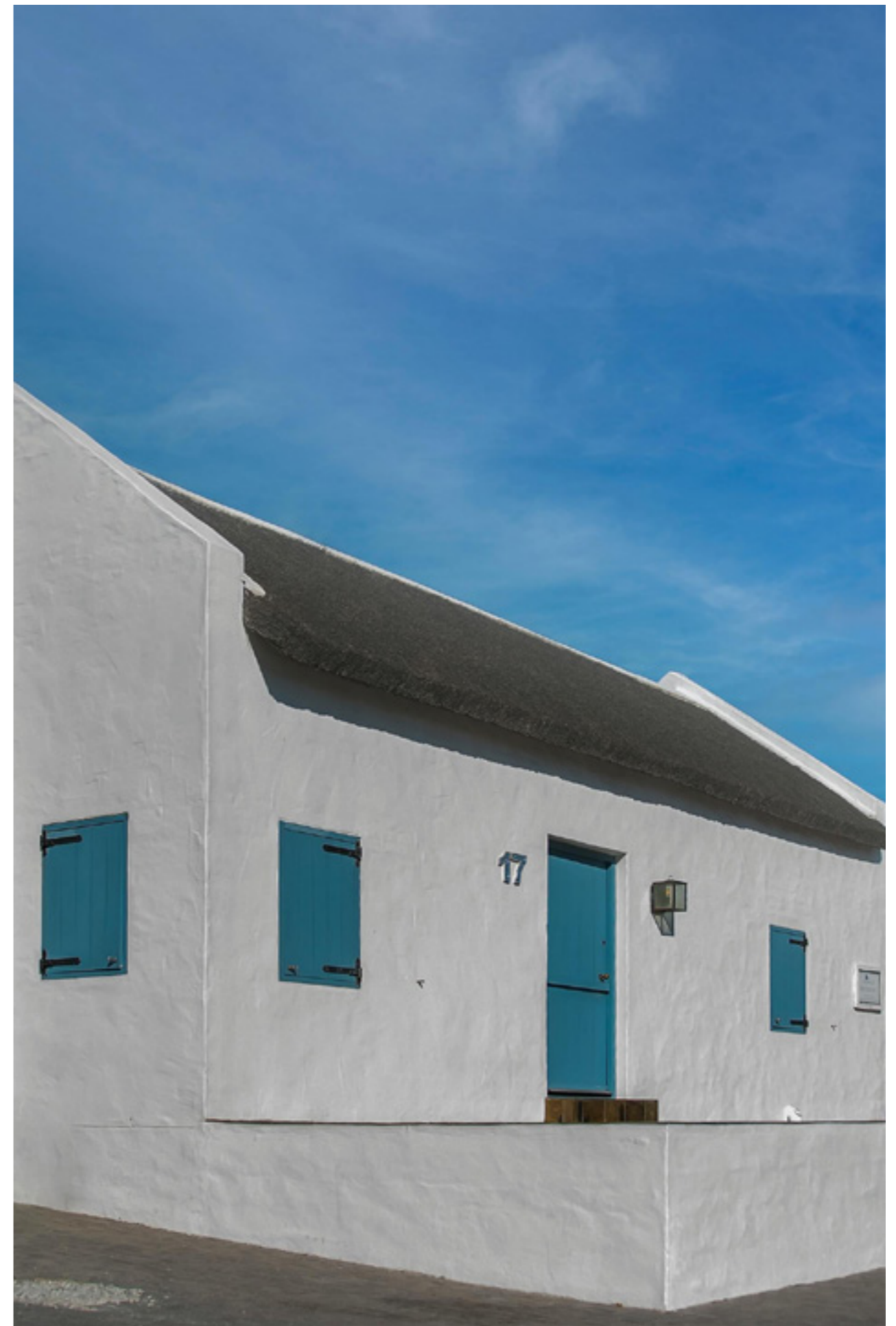
An analysis of the expected population and household growth for 2024 reveals significant insights into trends across the municipalities. Swartland and Saldanha Bay are projected to experience more rapid growth in both households (2.6 per cent and 3.7 per cent, respectively) and population (2.1 per cent and 1.9 per cent, respectively), positioning them as key areas of expansion within the District.

In contrast, Matzikama, with lower growth rates, remains a smaller and more stable community, reflecting a gradual development trajectory. Cederberg and Bergrivier exhibit moderate growth in population (1.7 per cent for both) and households (1.3 per cent and 2.6 per cent, respectively), indicating a balance between stability and expansion. Overall, these trends underline the need for careful spatial, economic, social, and environmental planning to accommodate growth while ensuring sustainable development.

Figure 93
POPULATION AND HOUSEHOLD GROWTH, West Coast District, 2023-2024



Source: Western Cape Government PPU, 2024; Provincial, District and local municipality population estimates by sex and age (2002 – 2030) based on Stats SA MYPE, 2021 and 2024. Note: the household growth is based on estimates from the 2022 MYPE (Size of bubble is based on number of households)

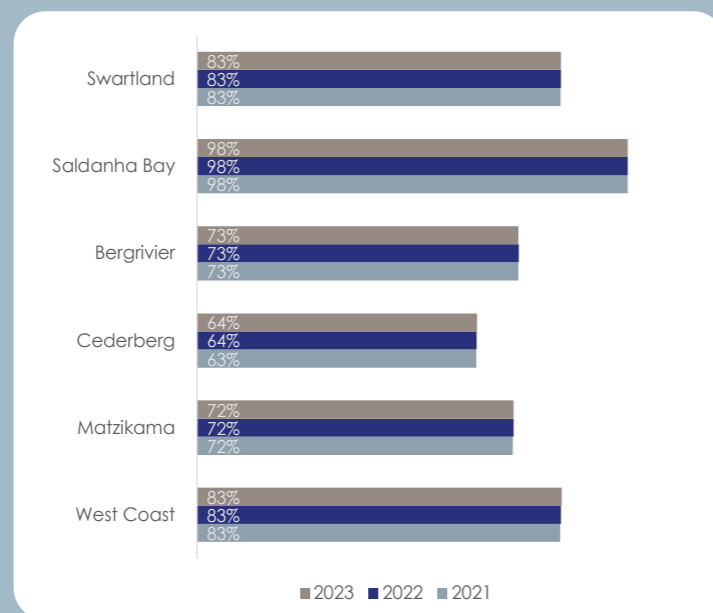


URBANISATION IN THE WEST COAST DISTRICT

The WCD is highly urbanised, with 83 per cent of its population residing in urban areas, reflecting significant urban development across its municipalities in recent years. This level of urbanisation is expected to remain stable, as rural-to-urban migration is a long-term trend that typically changes at a gradual pace. Saldanha Bay is the most urbanised municipality in the District, with an urbanisation level of 98 per cent.

This is driven by significant economic opportunities associated with its industrial port and related sectors. Similarly, Swartland has high urbanisation levels, at approximately 83 per cent, reflecting its growing towns and proximity to Cape Town. Bergrivier and Matzikama exhibit more moderate urbanisation levels, though these remain relatively high at 73 per cent and 71 per cent, respectively, supported by their mix of urban centres and rural areas. In contrast, Cederberg has the lowest urbanisation level in the District, at 64 per cent. This is primarily due to its reliance on agriculture, dispersed settlements, and limited industrial or urban infrastructure compared to other municipalities. These urbanisation rates underline a region that balances the advantages of urban living with the appeal of rural environments, offering a diverse range of lifestyle choices to its residents.

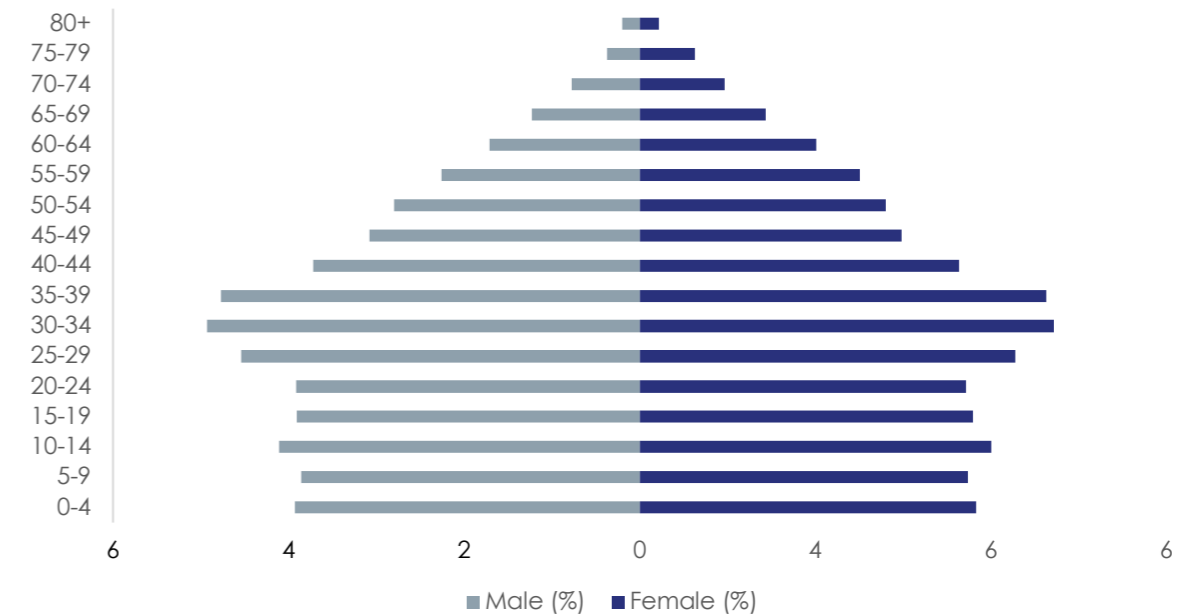
Figure 94
LEVEL OF URBANISATION, West Coast District, 2021-2023



Source: Quantec, 2024

The WCD has a substantial working-age population, comprising 70.7 per cent of the total, indicating a strong labour force positioned to support economic activity and growth. Children under 15 years make up 23.5 percent, while seniors over 65 years account for 5.8 percent, underscoring the importance of comprehensive social planning to address diverse needs. The population also features an almost equal gender split, with 50.1 percent male and 49.9 percent female.

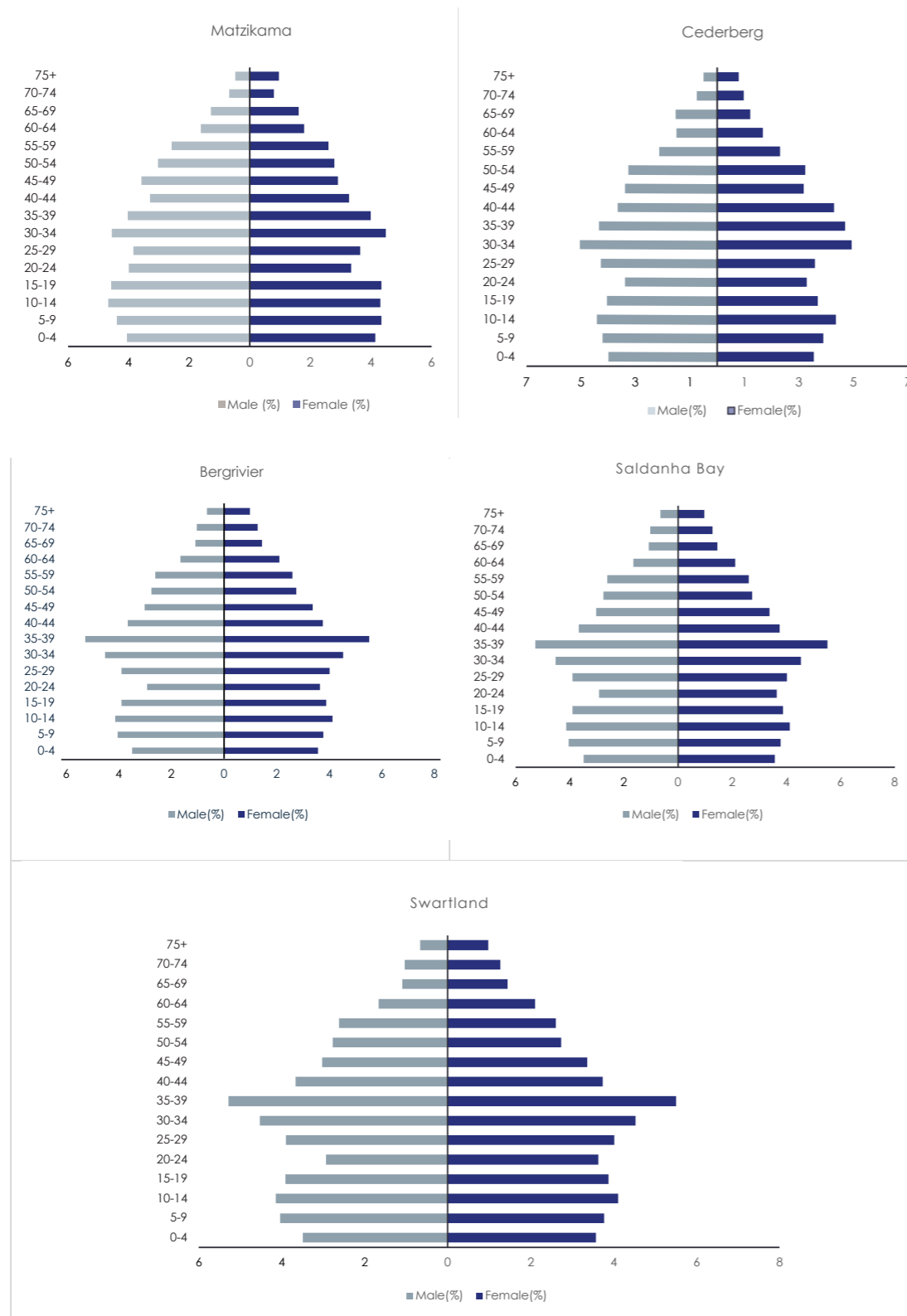
Figure 95
GENDER AND AGE DYNAMICS, West Coast District, 2023



Source: Stats SA MYPE, 2024

In 2023, Saldanha Bay and Swartland municipalities recorded the highest proportions of the economically active population, at 71.7 per cent and 71.6 per cent, respectively. Both municipalities exhibited a relatively equal gender distribution, with males comprising 50.3 per cent and 50.2 per cent of the population, respectively. This slight male predominance is also evident in the Matzikama and Cederberg municipalities, where the economically active population constitutes 68.3 per cent and 69.9 per cent, respectively. In both cases, males make up just over half of these figures. In contrast, the Bergrivier municipality, despite a high proportion of those aged 15 to 64, at 70.4 per cent, showed a more female-dominant gender split, with females representing 51.3 per cent of the population.

Figure 96
GENDER AND AGE DYNAMICS PER DISTRICT, West Coast District, 2023

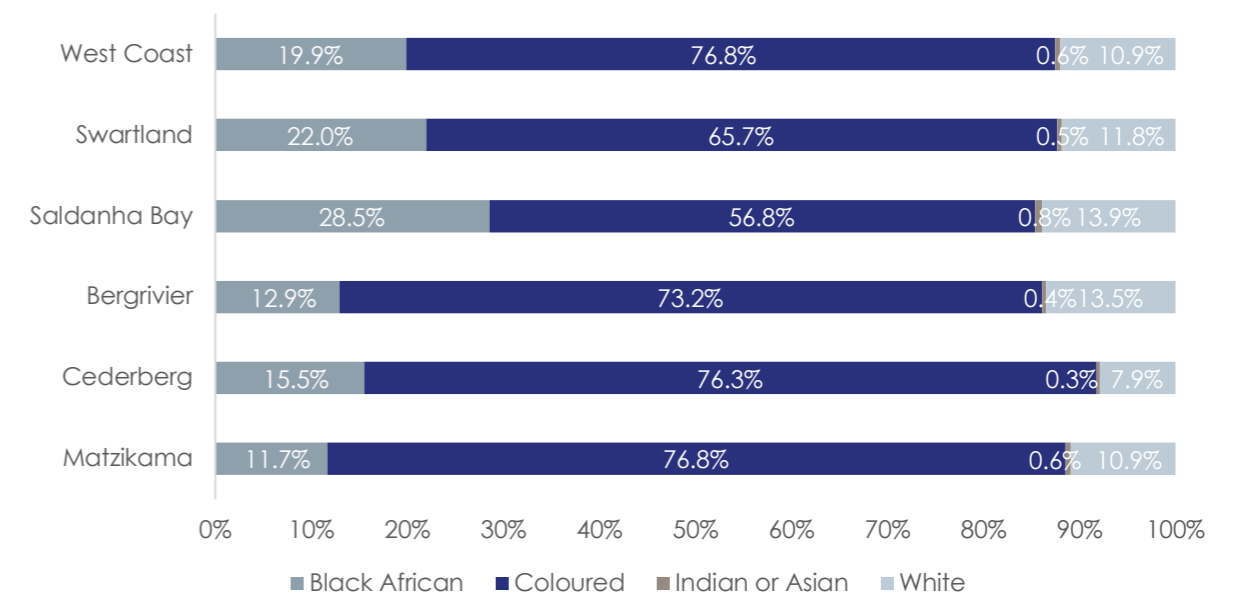


Source: Stats SA MYPE, 2021

In 2023, the racial composition of the WCD and its municipalities presents a diverse demographic profile. In Matzikama, the population is predominantly Coloured at 76.8 per cent, with Black Africans making up 11.7 per cent, Whites 10.9 per cent, and Indians or Asians at 0.6 per cent. Cederberg has a similar trend with 76.3 per cent Coloureds, 15.5 per cent Black Africans, 7.9 per cent Whites, and 0.3 per cent Indians or Asians. Bergrivier's population is 73.2 per cent Coloured, 13.5 per cent White, 12.9 per cent Black African, and 0.4 per cent Indian or Asian.

Saldanha Bay shows a more varied distribution with 56.8 per cent Coloureds, 28.5 per cent Black Africans, 13.9 per cent Whites, and 0.8 per cent Indians or Asians. Swartland's population consists of 65.7 per cent Coloureds, 22.0 per cent Black Africans, 11.8 per cent Whites, and 0.5 per cent Indians or Asians. Overall, the WCD comprises 67.6 per cent Coloureds, 19.9 per cent Black Africans, 12.0 per cent Whites, and 0.5 per cent Indians or Asians. Economic development strategies should focus on creating equitable opportunities for all racial groups, ensuring access to education, healthcare, and employment.

Figure 97
RACIAL DISTRIBUTION, West Coast District, 2023



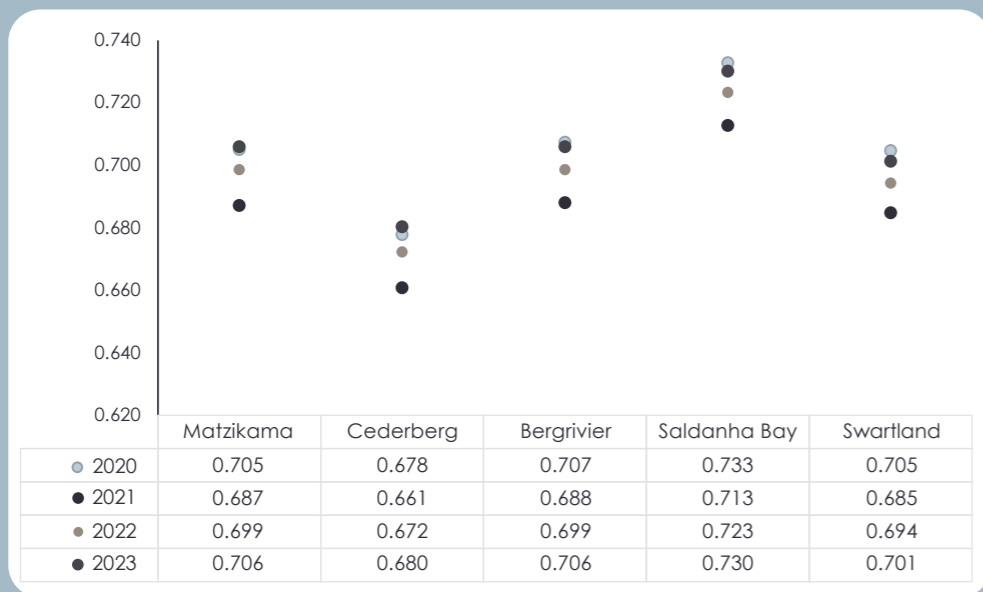
Source: Own calculation using Quantec data (2024) and conversion using the Western Cape Government PPU, 2024; provincial, district and local municipality population estimates by sex and age (2002 – 2030) based on Stats SA MYPE (202) population numbers

Human Development Index

Definition: The Human Development Index (HDI) is a measure created by the United Nations Development Programme (UNDP) to assess a country's overall progress. It allows for evaluation in terms of three fundamental aspects of human development: life expectancy, education and standard of living. The index serves as a metric to gauge the average level of achievement across these aspects within a country.

The impact of COVID-19 on life expectancy, education and employment was noteworthy and subsequently affected income levels in the District. The WCD's HDI has started to recover from the post-pandemic levels thanks to improvements in income levels, education attainment and health. In 2023, the WCD recorded an HDI of 0.705, compared to 0.697 in 2022.

Figure 98
HDI PER MUNICIPAL AREA, West Coast District, 2020 – 2023



Source: S&P Global: Market Intelligence, 2024

However, the HDI levels are quite differentiated within the District. The Saldanha Bay municipal area recorded the highest HDI in 2023 of 0.730. It was closely followed by the Matzikama and Bergrivier, supported by relatively higher incomes and improved access to education in the latter. Conversely, Cederberg (0.680) registered a comparatively lower standard of living because of challenges related to its low-skilled agriculture sector. These disparities underscore the pressing need to address socio-economic inequalities, foster educational opportunities and elevate incomes to uplift communities and create a more equitable and prosperous region.

The HDI provides a multidimensional view of a region's socio-economic development. A region's economic performance holds immense significance in determining the quality of life of its residents. As economies thrive, human development tends to improve, translating into better quality of life for individuals. The prosperity and growth of an economy can drive advancements in education, healthcare and access to resources, which in turn contribute to the overall wellbeing of the population.

INCOME AND INEQUALITY

This section analyses several dimensions of income and inequality including GDP per capita, highlighting the average economic output per person; district median income, which offers a snapshot of the middle-income range within the community; wage distribution for formal full-time employment, revealing the spread of earnings among workers; and the analysis of individual taxpayers and taxable income, providing insights into the fiscal contributions and income disparities among residents.

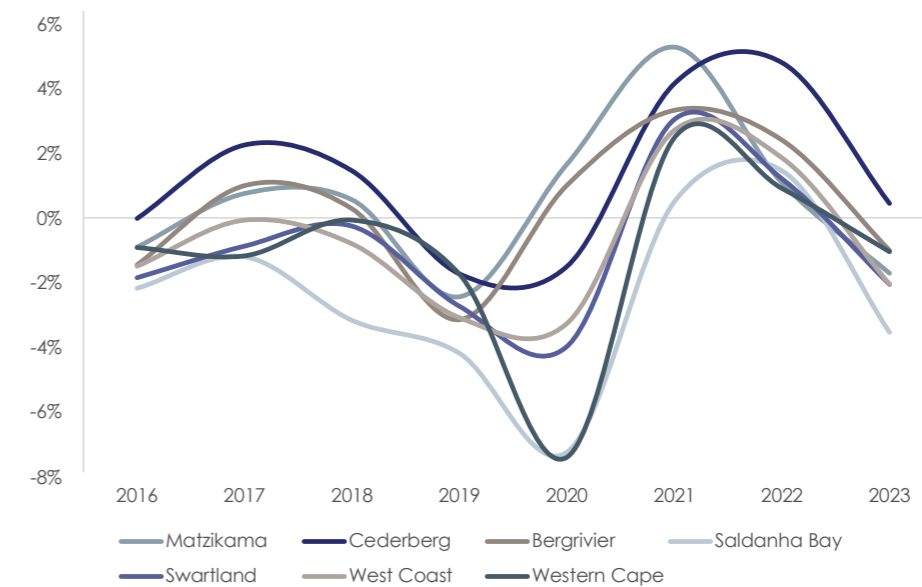
Real GDP per capita

In 2023, the WCD's GDP per capita stood at R58 028, a slight decrease from the previous year's R59 227 (a 2 per cent contraction), despite the 0.7 per cent GDP growth indicated in Section B. This declining GDP is explained by population growth that is outstripping GDP in the region. Notably, this GDP per capita remains below the Western Cape's average of R80 488.

Cederberg maintains its economic lead in the District with a GDP per capita of R67 735, a slight decrease of 0.5 per cent from the previous year. The primary drivers for Cederberg's economy include agriculture, particularly citrus farming, and tourism, which continue to bolster its economic standing despite minor contractions. Saldanha Bay's GDP per capita declined to R58 646, the lowest in the region, following a 3.5 per cent contraction. This is due to fluctuations in global demand and industrial output, which have affected the economic performance of the maritime and industrial sectors. Swartland also had a significant decrease in GDP per capita of R51 677, a contraction of 2.3 per cent.

Matzikama, with a GDP per capita of R60 784, has experienced a decline of 1.7 per cent. Bergrivier, with a GDP per capita of R60 784, has seen a slight decrease but remains among the higher-performing municipalities in the District with a 0.5 per cent decline. The economic drivers for Bergrivier include agriculture, fishing, and small-scale manufacturing. The resilience in these sectors has helped maintain its economic performance.

Figure 99
GDP PER CAPITA GROWTH (CONSTANT PRICES), West Coast District, 2016 – 2023



Source: Quantec, 2024

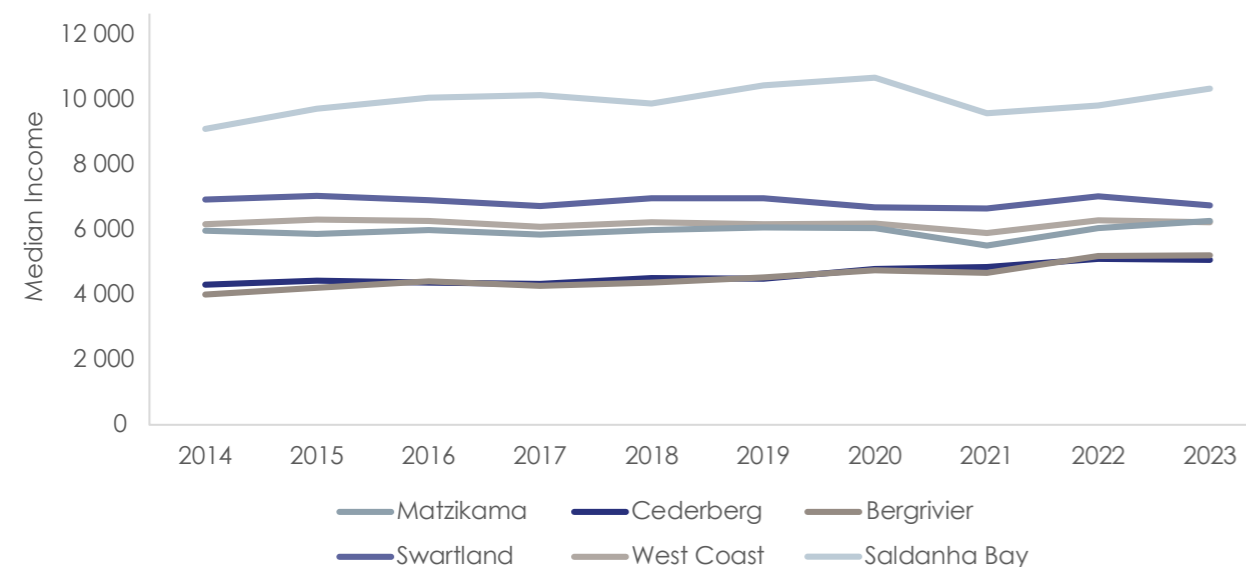
Median income

Unlike GDP per capita, which measures average economic output per person, median income focuses on the most prevalent income level and economic equality. While GDP per capita has shown an overall decline in 2023, the median income in the WCD and its municipalities has seen little change.

Cederberg reported a median monthly income of R5 072, the lowest amongst the municipalities. This is due to seasonal and lower-wage employment in the agricultural sector compared to industrial or services sectors. Matzikama reported a median income of R6 275, relatively moderate compared to other municipalities in the District. This suggests a balanced economic environment, with a significant portion of the population earning around this level. Bergrivier reported a median income of R5 215, slightly higher than Cederberg's but still on the lower end of the spectrum. Bergrivier lacks significant industrial or service sector development. This limits the availability of higher-paying jobs and contributes to lower median incomes.

Saldanha Bay reported the highest median income of R10 356 in the District, more than double that of some other municipalities. This is due to the presence of the Saldanha Bay IDZ and a strong maritime and industrial sector. Swartland reported a relatively high median income of R6 761, reflecting a stable economic environment supported by agriculture and agro-processing industries.

Figure 100
MEDIAN INCOME PER MUNICIPALITY (IN CONSTANT PRICES), 2014 – 2023

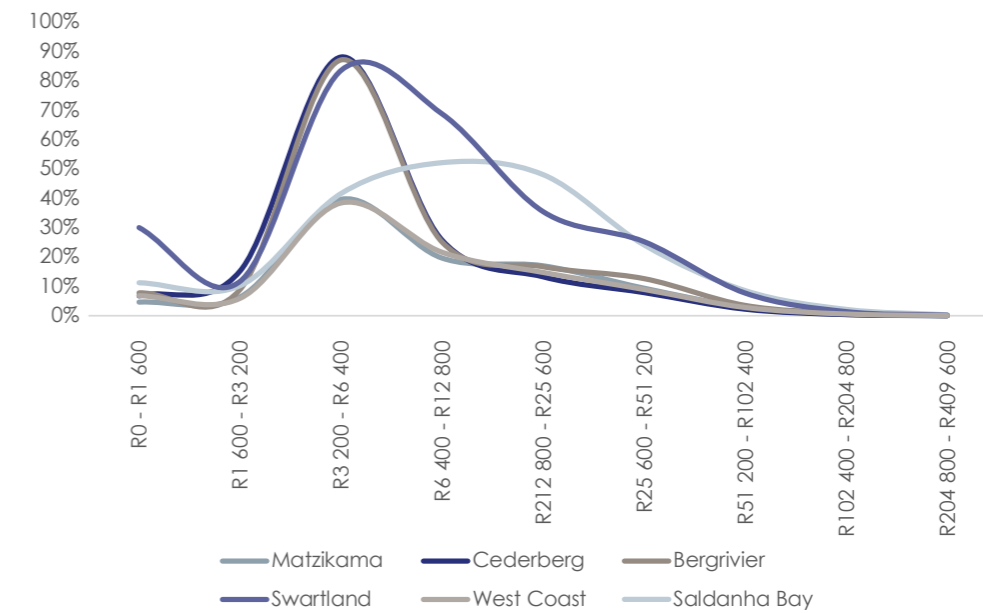


Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

Wage distribution

Across the municipalities, the wage disparity based on formal employment is evident, with most individuals earning close to the basic minimum wage: those earning above the minimum wage (approximated as higher than R3 200) constitute 21.6 per cent of the population. On the other hand, those earning between R25 600 and R51 200 account for 9 percent, highlighting district-wide income inequality and the limited disposable income available to afford basic services.

Figure 101
WAGE DISTRIBUTION PER MUNICIPAL AREA, West Coast District, 2023

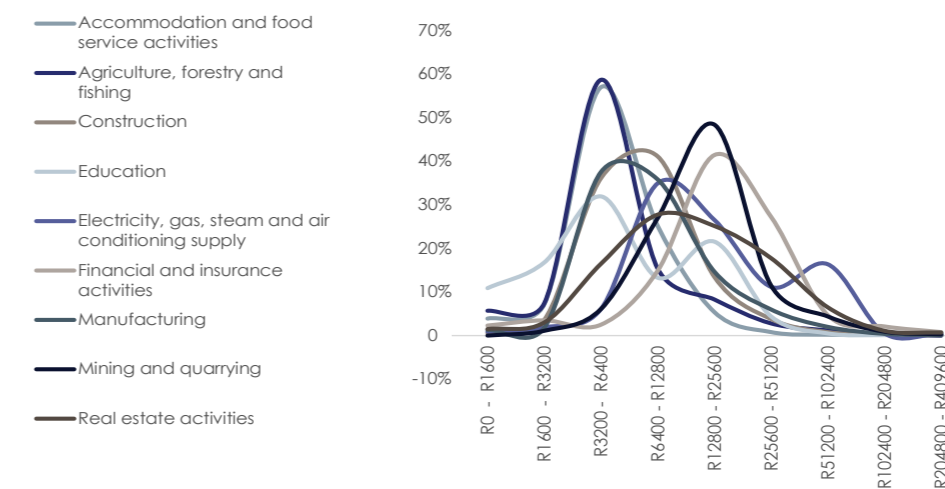


Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

The wage band data for the WCD in 2023 highlights trends in its key industries. The agriculture, forestry, and fishing sector, a major employer, has 58.8 per cent of its workforce in the R3 200 - R6 400 band, reflecting its labour-intensive and lower-wage nature. Similarly, accommodation and food services, linked to tourism, saw 57.1 per cent of workers in the same band, emphasising its reliance on service-based jobs.

In contrast, industries like manufacturing and mining and quarrying, vital to the District's economy, show higher wage distributions. Manufacturing has 35.9 per cent in the R6 400 – R12 800 band, while mining and quarrying has 48.5 per cent in the R12 800 – R25 600 band, highlighting the demand for semi-skilled and skilled labour. These patterns in 2023 reveal a divide between labour-intensive, lower-wage sectors and higher-paying, skilled industries.

Figure 102
WAGE DISTRIBUTION PER INDUSTRY, West Coast District, 2023



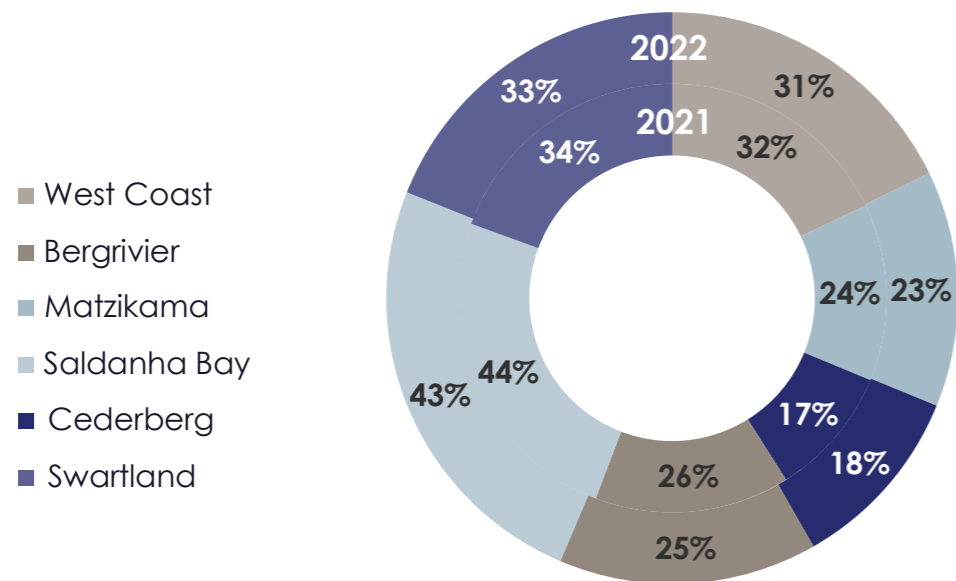
Source: Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

Individual taxpayers

The Income Tax Act of 1962 (the Act) governs the imposition of income taxes in South Africa. Under the Act, tax is levied on taxable income, essentially gross income, less any relevant exemptions and deductions permitted by law. Taxes enable the financing of public sector goods and services.

The WCD had an increase in the number of taxpayers to 52 927 in 2022 from 51 414 in 2021, equal to a 2.9 per cent growth. This contrasts with the Western Cape Province, which saw a slight overall decline in taxpayers over the same period. Within the District, Cederberg was a major contributor to this growth, with a notable rise of 482 taxpayers. Saldanha Bay, Swartland and Matzikama saw increases of 408, 219 and 215 taxpayers respectively, while Bergrivier experienced an increase of 194 taxpayers.

Figure 103
TAXPAYERS AS A PERCENTAGE OF TOTAL EMPLOYMENT, West Coast District, 2021 – 2022



Source: Quantec, 2024

While the WCD saw an increase in taxpayer numbers, the average monthly taxable income data for 2021 and 2022 provides additional layers to the economic picture. The District's average income rose from R26 056 to R28 501 per month, marking a 9.4 per cent inflation-related adjustment equal to R2 445 per month. This shows that more individuals were paying taxes and earning more on average.

Saldanha Bay experienced a growth in average income from R21 854 to R23 715. Matzikama's average income increased from R22 232 to R23 700, an above-inflation increase of 6.6 per cent. Swartland saw an average income increase from R22 272 to R23 442, indicating a shift towards higher-paying jobs within the municipal area. Bergrivier saw an average income increase from R21 682 to R21 901. However, Cederberg, despite adding 482 taxpayers, witnessed a slight decrease in average income from R19 127 to R18 238, suggesting an influx of lower-income earners or an oversupply of labour in the market.

Table 9
TAXPAYERS AND THE AVERAGE MONTHLY INCOME, West Coast District, 2021-2022

Number of Taxpayers	2021	2022
Western Cape	1 077 470	1 076 693
West Coast District	51 414	52 927
Matzikama	5 896	6 111
Cederberg	4 078	4 560
Bergrivier	6 845	7 039
Saldanha Bay	20 396	20 799
Swartland	14 199	14 418

Average monthly taxable income	2021	2022
Western Cape	R 21 774	R 22 926
West Coast District	R 26 056	R 28 502
Matzikama	R 22 233	R 23 700
Cederberg	R 19 127	R 18 238
Bergrivier	R 21 682	R 21 902
Saldanha Bay	R 21 846	R 23 715
Swartland	R 22 273	R 23 443

Source: Quantec, 2024

Income inequality

Income inequality is a measure of the uneven distribution of income within a population. It is a critical economic and social indicator that reflects the gap between the wealthy and the poor. Various metrics are used to assess income inequality, each providing a different perspective on the economic conditions of a society.

The Gini Index is one of the most widely used measures of income inequality. It is a number between 0 and 1, where 0 corresponds to perfect equality (everyone has the same income) and 1 corresponds to perfect inequality (one person has all the income, and everyone else has none).

From 2020 to 2023, the WCD and its municipalities have witnessed an improvement in income inequality, as indicated by the marginal decline in their Gini Indices. Over this period, the WCD's Gini Index decreased slightly from 0.609 in 2020 to 0.582 in 2023, indicating modest progress toward greater equality. This gradual improvement can be attributed to focused efforts on education and skills development, enhancing workforce participation and creating better employment opportunities and wage growth, particularly for historically disadvantaged communities.

Within the District, Swartland demonstrated consistent improvement, with its Gini Index moving from 0.609 in 2020 to 0.581 in 2023. Matzikama also showed progress with a slight increase from 0.601 in 2020 to 0.574 in 2023. Cederberg too showed progress, although its Gini Index saw a slight increase from 0.583 in 2022 to 0.586 in 2023, suggesting a minor challenge in maintaining the momentum. Bergrivier saw a slight decrease with its Gini Index improving from 0.596 in 2020 to 0.571 in 2023, indicating substantial efforts towards addressing income inequality. Saldanha Bay's Gini Index similarly improved, moving from 0.617 in 2020 to 0.581 in 2023.

Table 10
INCOME INEQUALITY MEASURED BY THE GINI INDEX, West Coast District, 2021-2023

Geography	2020	2021	2022	2023
West Coast	0.609	0.596	0.581	0.582
Matzikama	0.601	0.588	0.573	0.574
Cederberg	0.608	0.597	0.583	0.586
Bergrivier	0.596	0.584	0.570	0.571
Saldanha Bay	0.617	0.603	0.588	0.588
Swartland	0.609	0.596	0.580	0.581

Source: S&P Global: Market Intelligence, 2024

The National Development Plan (NDP) envisions a transformed South Africa by 2030. Key goals include eliminating households with a monthly income below R419 per person, reducing this percentage from 39 per cent to zero, and decreasing the Gini coefficient from 0.690 to 0.600. Achieving these objectives requires addressing the root causes of poverty and inequality, shifting from short-term to evidence-based policies, and ensuring a "decent standard of living" for all South Africans by 2030.



POVERTY

This section analyses the two dimensions of poverty, namely, prevalence of indigent households and the food poverty line. A household is classified as indigent if its occupants earn a combined income that is less than the threshold specified in the indigent policy of a municipal area. Food security is a condition in which people have physical, social, and economic access to sufficient, safe, and nutritious food that meets their dietary needs and food preferences for an active and healthy life.

Indigent households

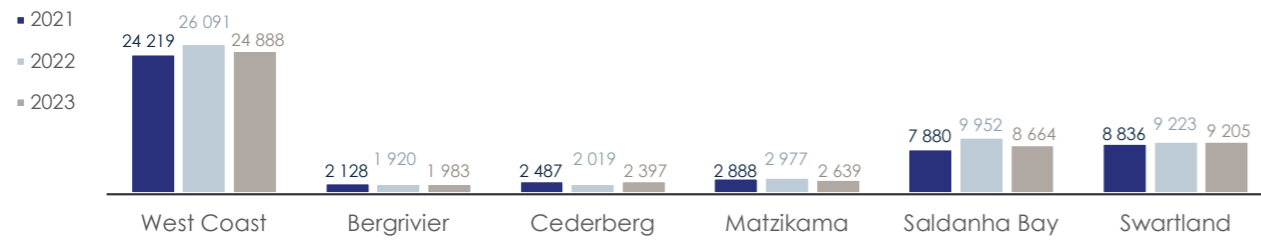
The definition of indigent households in WCD municipal areas consider all sources of income to ensure that support is extended to a broader range of individuals in need.

Matzikama	Cederberg	Bergrivier	Saldanha Bay	Swartland
All households earning less than R5 103 per month will receive free basic services	All households earning less than R3 800 per month will receive free basic services	Customers can apply for indigent subsidies if the total household income of all members of the household living on the premises is less than R4 000 per month	Gross income for a household must be R5 500 or less per month	The combined income of the occupants does not exceed R4 515.38

In the WCD, the number of indigent households saw a contraction of 4.6 per cent from 26 091 in 2022 to 24 888 in 2023 (19 per cent of total households), reflecting an overall improvement in socio-economic conditions. However, the trends varied across different areas within the District. Bergrivier saw a slight increase of 3.3 per cent in indigent households from 1 920 in 2022 to 1 983 in 2023 (9.9 per cent of total households), driven by localised economic challenges and rising living costs. Cederberg experienced a more significant rise of 18.7 per cent from 2 019 in 2022 to 2 397 in 2023 (14.3 per cent of total households), due to job losses and reduced working hours, especially for those in lower-paying and informal sectors.

Conversely, Matzikama saw a decrease of 11.4 per cent from 2 977 in 2022 to 2 639 in 2023 (13.3 per cent of total households), due to successful local economic initiatives and poverty alleviation programmes. Saldanha Bay experienced a notable contraction of 12.9 per cent in indigent households from 9 952 in 2022 to 8 664 in 2023 (21.9 per cent of total households), driven by industrial growth and job creation efforts in the region. Swartland's indigent household numbers remained relatively stable, with a slight decrease of 0.2 per cent from 9 223 in 2022 to 9 205 in 2023, indicating consistent socio-economic conditions. The overall decrease in indigent households indicates that targeted interventions and economic development efforts have had a positive impact on reducing poverty in the region.

Figure 104
NUMBER OF INDIGENT HOUSEHOLDS, West Coast District, 2021 – 2023



Source: Quantec, 2024. Nell, A & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor), 2024

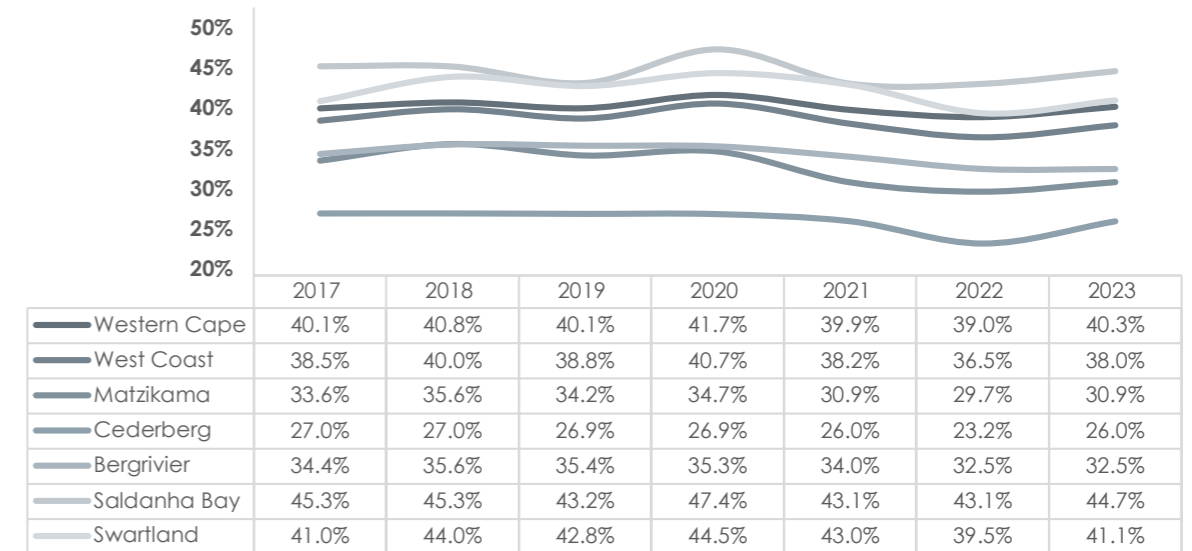
Food insecurity

Food security is a condition in which people have physical, social, and economic access to sufficient, safe, and nutritious food that meets their dietary needs and food preferences for an active and healthy life. It encompasses four key pillars: availability, access, utilisation, and stability according to the Bureau for Food and Agricultural Policy (BFAP). Food insecurity refers to limited access across these dimensions.

In 2022, 36.5 per cent of the population in the WCD lived below the food poverty line (FPL). This figure increased to 38 per cent in 2023, indicating a growing challenge in ensuring food security for the region's population. In Matzikama, the proportion of food insecurity increased from 29.7 per cent in 2022 to 30.9 per cent in 2023. This is due to economic challenges such as high unemployment rates and limited job opportunities. Cederberg experienced a notable increase in the proportion of food insecurity, with rates rising from 23.2 per cent in 2022 to 26 per cent in 2023, due to social exclusion and limited access to social support networks.

In Bergrivier, the proportion of food insecurity remained steady at 32.5 per cent in both 2022 and 2023. This stability indicates persistent economic challenges and limited job opportunities that have maintained high food poverty rates. Saldanha Bay saw an increase in the proportion of food insecurity, with rates rising from 43.1 per cent in 2022 to 44.7 per cent in 2023. This increase is driven by economic instability and high unemployment rates. Swartland experienced an increase in the proportion of food insecurity, with rates rising from 39.5 per cent in 2022 to 41.1 per cent in 2023. This is due to high housing costs further straining household budgets and reducing the amount available for food.

Figure 105
PROPORTION OF POPULATION BELOW THE FOOD POVERTY LINE, West Coast District, 2017 – 2023



Source: Quantec, 2024

Insufficient consumption of essential nutrients is a common contributing factor to both severe acute malnutrition and low birth weight. Notably, pregnant mothers experiencing food poverty may lack access to the nutrients necessary for healthy foetal development, potentially resulting in low birth weight. Similarly, children growing up in conditions of food poverty are likely to have diets deficient in the nutrients crucial for optimal growth and development, potentially leading to severe acute malnutrition. The dire state of food insecurity in the country needs to be given significant attention given the elevated levels compared to global averages as discussed below.



The State of Food Security and Nutrition in the World 2024: A Condensed Overview

The "State of Food Security and Nutrition in the World 2024" report by the Food and Agricultural Organisation of the United Nations highlights persistent global hunger and food insecurity. From 2019 to 2021, global hunger rose sharply and has since remained at nearly the same level, affecting 9.1 per cent of the population in 2023, up from 7.5 per cent in 2019. An estimated 733 million people faced hunger in 2023, about 152 million more than in 2019.

Regional trends show significant variation. Hunger continues to rise in Africa, remains unchanged in Asia, and shows progress in Latin America. In 2023, Africa had the highest proportion of its population facing hunger at 20.4 per cent, while Asia, despite having 8.1 per cent of its population affected, is home to more than half of the world's hungry, approximately 385 million people. Latin America and the Caribbean, and Oceania had 6.2 per cent and 7.3 per cent of their populations facing hunger, respectively.

Projections indicate that 582 million people will be chronically undernourished by the end of the decade, with more than half in Africa. This is 130 million more than pre-COVID-19 levels. Additionally, moderate or severe food insecurity remains above pre-pandemic levels, affecting 28.9 per cent of the global population, or 2.33 billion people, in 2023. Of these, 864 million people were severely food insecure, posing significant health risks.

The report underscores the urgent need for global efforts to address food insecurity and hunger, calling for policies and interventions that provide immediate relief and build resilient food systems to withstand future shocks.



HEALTH

The wellbeing of a population plays a crucial role in improving labour productivity, an aspect that has immense potential for economic growth and development. This section reviews the main health indicators which are health infrastructure and resources, child health, maternal health and communicable diseases to gauge progress towards promoting health and welfare within the WCD.

Infrastructure and Resources

Health facilities play a crucial role in promoting and maintaining a healthy society by providing access to healthcare, quality health services, and contributing to economic and community well-being. The WCD has a total of 27 primary healthcare (PHC) facilities, consisting of 26 fixed clinics and 1 community day centre. There are an additional 38 mobile/satellite clinics plus 7 District hospitals.

Table 11
TOTAL NUMBER OF PRIMARY HEALTH CARE (PHC) FACILITIES, West Coast District, 2021/22 – 2024/25

Total number of PHC facilities (Fixed Clinics, CHCs and CDCs)	2021/22	2022/23	2023/24	2024/25
Bergvriër	3	3	3	3
Cederberg	6	6	6	4
Matzikama	5	5	5	5
Saldanha Bay	7	8	8	8
Swartland	5	5	7	7
West Coast	26	27	29	27

Source: Western Cape Department of Health and Wellness, 2024

These public healthcare facilities serve the 484 110 residents in the WCD. In the last three years, the District's population has grown at 1.6 per cent per annum indicating an increased demand for existing resources. Recognising this need, the MTEF has allocated R101 million for the period 2024/25 – 2026/27 across 20 projects to expand healthcare services. Effective implementation of this expansion is crucial to ensure access to adequate healthcare for all residents.

Hospital beds

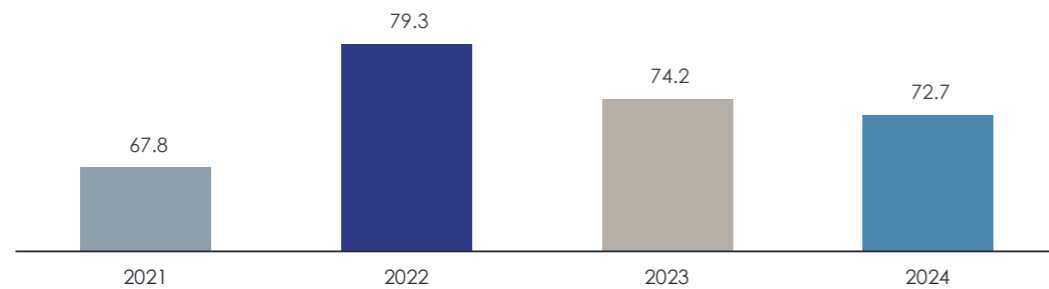
Hospital bed availability is critical for ensuring access to medical care and reflects capacity to address healthcare needs such as emergencies and serious illnesses.³⁸ The hospital beds are measured on a per 10 000 target population. The total number of hospital beds includes inpatient beds approved in all categories of health facilities in the public sector.

As of March 2023, the national average for hospital beds per 10 000 uninsured population is 20.3. In the Western Cape, this average is lower at 18.3 beds.

³⁸ Health Systems Trust, 2023

In addition to the brick-and-mortar facilities, there is need to ensure access to healthcare providers. The public sector professional nurse population declined between 2022 and 2024, from 79.3 professional nurses per 10 000 uninsured population in 2022 to 72.7 in 2024. This decline can be attributed to various factors, including retirements, budget constraints and migration of nurses to other regions. This declining trend is contradictory to the measures put in place by the DoHW. The department has made strategic investments in health education, training, and youth development programmes. These initiatives facilitate successful nursing graduations, bursary allocations, and emergency care training to collectively enhance the nursing workforce.⁴²

Figure 106
PUBLIC SECTOR PROFESSIONAL NURSE PER 10 000 UNINSURED POPULATION RATIO, West Coast District, 2021-2024



Source: Quantec, 2024

Child Health

The health and well-being of children are crucial indicators of a districts' overall development and prosperity. This section reviews key child health indicators including the neonatal mortality rate, low birth weight rate, immunisation rates and severe acute malnutrition prevalence among children under five years. By examining these metrics, stakeholders can better understand the challenges and opportunities in enhancing child health and development.

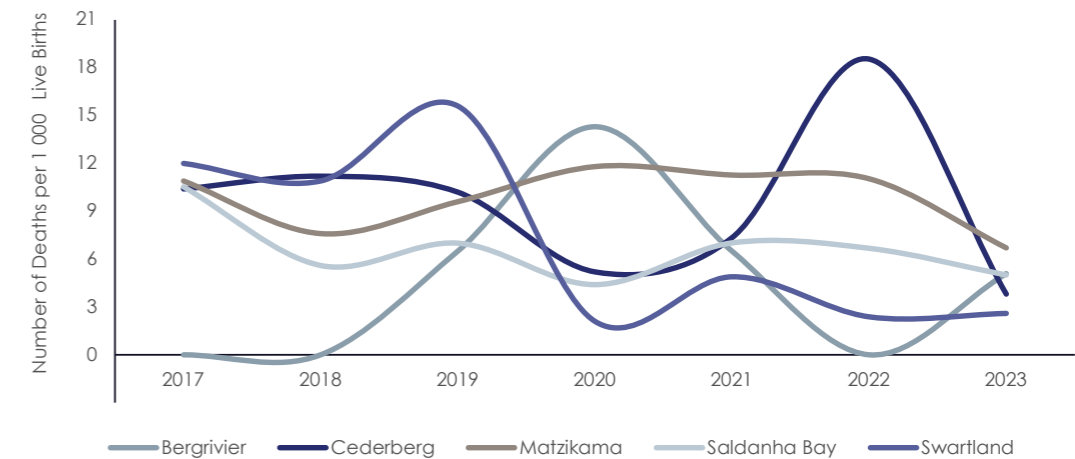
Neonatal mortality rate

The first 28 days of life, known as the neonatal period, represent the most vulnerable time for a child's survival. Consequently, the neonatal mortality rate (NMR) is measured as the number of neonates who die before reaching 28 days of age, per 1 000 live births each year.

The WCD's neonatal mortality rate has shown a downward trend over the past four years, despite some fluctuations. The rate has decreased from a peak of 9.2 in 2017 to 4.57 in 2023. Notably, the neonatal mortality rate for the District in 2023 is lower than the Provincial rate of 8.2.

39 Department of Health and Wellness, 2022/23

Figure 107
NEONATAL MORTALITY RATES PER 1 000 LIVE BIRTHS, West Coast District, 2017 - 2023



Source: Western Cape Department of Health and Wellness, 2024

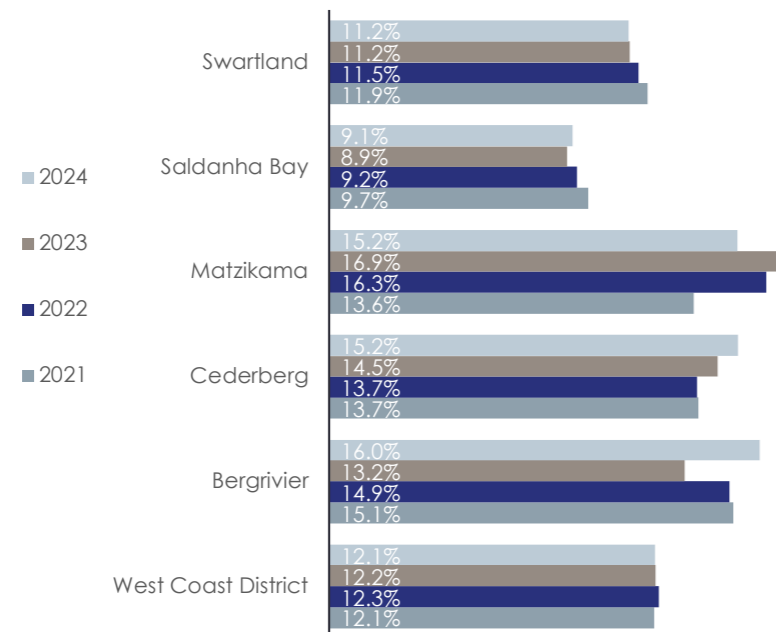
The Western Cape DHW has made efforts to improve healthcare facilities and services, which has contributed to the decline in neonatal deaths.⁴³ Swartland recorded the lowest neonatal rate in the District as well as the Province at 2.6 deaths per 1 000 live births in 2023. Matzikama recorded the highest neonatal rate at 6.7 deaths per 1 000 live births in 2024, despite a drastic decline from 11 deaths per 1 000 live births in 2022. Cederberg's neonatal rates have varied over the review period however in 2023 it recorded the highest decline of 79.5 per cent.

Weight at birth is regarded as a core health indicator. Low birth weight is linked to long-term maternal malnutrition, ill health and poor healthcare during pregnancy. Additionally, low birth weight is associated with high neonatal mortality. According to the World Health Organization (WHO), a birth weight of less than 2 500g is considered low. This indicator measures the proportion of newborn babies that are below the birth weight of less than 2 500g.

The WCD has consistently reported moderately stable low birth weight rates of around 12.1 per cent over the past four years, with a significant increase in 2022. However, the low-birth-weight rates across the local municipal areas are varied, ranging from as low as 9.1 per cent in Saldanha Bay to 16 per cent in Bergrivier. Saldanha Bay has the highest low birth weight rate in the District despite increasing in 2023.

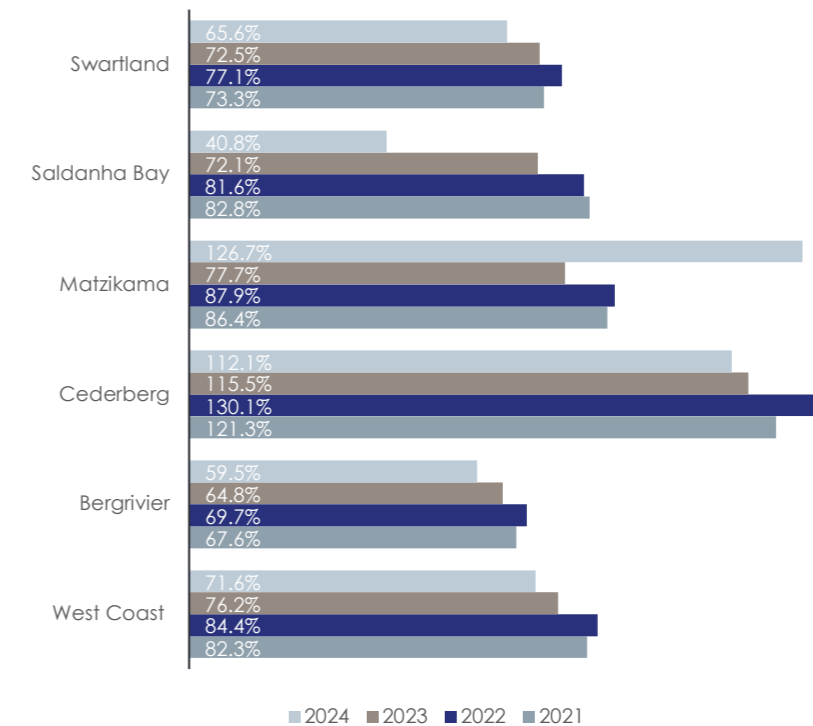
40 World Health Organization, 2020

Figure 108
LOW BIRTH WEIGHT RATE, West Coast District, 2021 -2024



Source: Western Cape Department of Health and Wellness, 2024

Figure 109
IMMUNISATION RATE (PUBLIC AND PRIVATE PARTNERS), West Coast District, 2021 – 2024



Source: Western Cape Department of Health and Wellness, 2024

The immunisation rate is measured as the number of children immunised as a percentage of the total number of children less than one year of age. Immunisations are a crucial part of public health strategy to ensure the well-being and healthy development of individuals and the community at large.⁴¹ Most individuals cannot afford vaccination programmes, leaving the mass population reliant on the public health system.

The WCD's total vaccination expenditure across all programmes was estimated at R12.9 million in 2023. This funded 4 892 vaccinations for the population under one year of age, at an average cost of R2 630 per vaccination—a notable decrease from the R2 951 average cost in 2021. In the last four years, the District's immunisation rate fell from 82.3 per cent in 2020/2021 to 71.6 per cent in 2023/24. Across the District, immunisation rates are quite varied. However, they all exhibit a concerning declining trend except Matzikama in 2023/24. Matzikama is the only municipal area in the District that experienced a significant increase in immunisation rates in 2024, rising to 126.7 per cent. In contrast, Saldanha Bay recorded the steepest decline, with rates dropping by 43.4 per cent. Despite improved affordability, the overall decline in immunisation rates can be partly attributed to limited access to immunisation programmes within the District.

Malnutrition (either under- or over-nutrition) refers to the condition whereby an individual does not receive adequate amounts, or receives excessive amounts, of nutrients. Acute malnutrition which is also known as 'wasting', is characterised by a rapid deterioration in nutritional status over a short period of time. In children, it can be measured using the weight-for-height nutritional index or mid/upper arm circumference.⁴²

There are different levels of severity of acute malnutrition, moderate acute malnutrition (MAM) and severe acute malnutrition (SAM). Severe acute malnutrition (SAM) is expressed as the number of malnourished children under five years per 100 000 people.⁴³

Access to good nutrition is a cornerstone of health and well-being, affecting every aspect of life from physical health to mental and emotional well-being, economic stability, and social equity. Yet, malnutrition remains a prevalent issue in the Western Cape and South Africa at large. The SAM rate per 100 000 children under five years in WCD has varied over the past four years recording a concerning increase in 2024 to 2.4 malnourished children under five years per 100 000, with significant variations across the WCD.

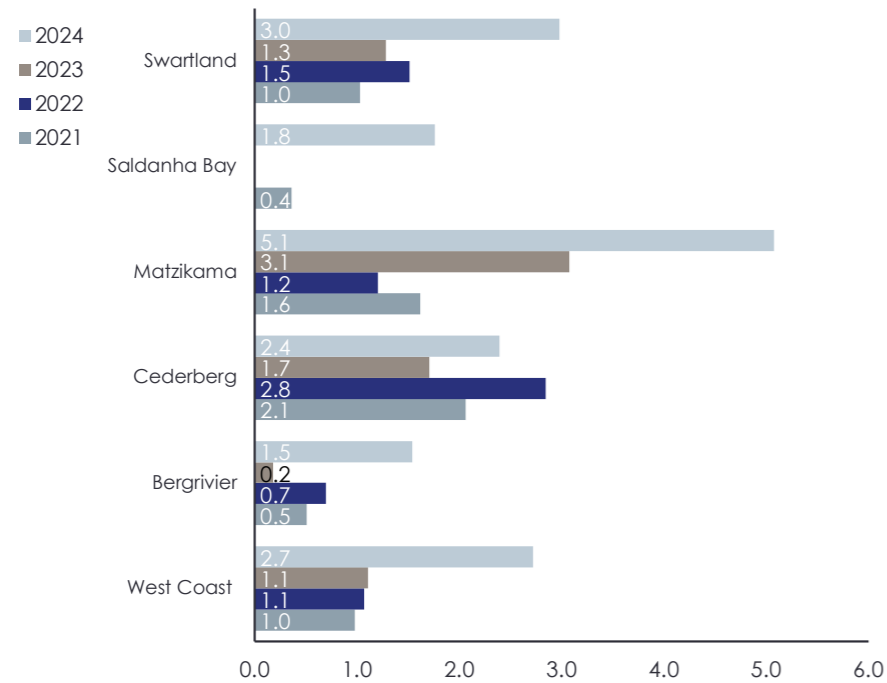
Bergrivier recorded the lowest levels of SAM across the five municipal areas at 1.5 malnourished children under five years per 100 000 people respectively. Matzikama recorded the highest SAM rate at 5.1 malnourished children under five years per 100 000 in 2023/24.

41 Western Cape Department of Health and Wellness, 2024

42 Department of Health and Wellness, 2015

43 Mandla, Mackay, & Mda, 2022

Figure 110
SEVERE ACUTE MALNUTRITION PER 100 000 CHILDREN UNDER FIVE YEARS, West Coast District, 2021 – 2024



Source: Western Cape Department of Health, 2024

Maternal health

According to the World Health Organization (WHO), maternal mortality refers to the death of a woman during pregnancy or within 42 days after the end of a pregnancy, from any cause related to the pregnancy or its treatment, excluding accidental causes.⁴⁷ The National Department of Health (NDoH) defines maternal mortality in facility ratio as the number of women who die in a healthcare facility during pregnancy, childbirth, or within 42 days after the end of a pregnancy, regardless of the cause of death, expressed per 100 000 live births in that facility.⁴⁸ The NDoH measures deaths occurring in healthcare facilities only, whereas the WHO definition encompasses all deaths related to pregnancy, regardless of where they occur.

The WCD shows a drastic decline in maternal death rates from 50.9 in 2022 to 18.3 per 100 000 live births in 2023. Cederberg recorded 220.3 deaths per 100 000 live births in 2022. Matzikama experienced an increase in the maternal death rates from 91.5 in 2022 to 99.5 in 2023 per 100 000 live births.

Table 12
MATERNAL DEATH RATES PER 100 000 LIVE BIRTHS, West Coast District, 2021/22 – 2023/24

	2021/22	2022/23	2023/24
Bergrivier	0.0	0.0	0.0
Cederberg	220.3	0.0	0.0
Matzikama	91.5	99.5	0.0
Saldanha Bay	0.0	0.0	0.0
Swartland	0.0	0.0	0.0
West Coast District	51.0	18.3	0.0

Source: Western Cape Department of Health and Wellness, 2024. Note that the statistic zero indicates no data available.



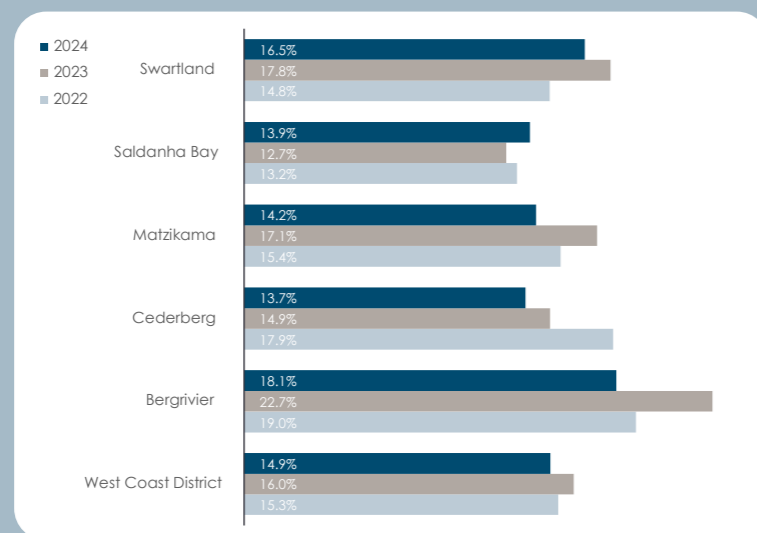
44 World Health Organization, 2024; Oyston, Rueda-Clausen, & Baker, 2017
45 Health Systems Trust, 2020

Teenage pregnancy

The delivery rates of women under 19 years of age in facility rate measures the deliveries to women under the age of 20 years as a proportion of total deliveries in the health facility presented as a percentage. The numerator is the number of deliveries to women under 19 years of age in the facility, while the denominator is the total number of deliveries in the facility. The indicator is a proxy for the adolescent birth rate.⁴⁶

The delivery rates to women under 19 years of age in facilities in the WCD are relatively high at 14.9 per cent in 2024, but have declined from 16.0 per cent in 2023. Similarly, all the municipal areas, except Saldanha Bay, experienced a decline in delivery rates to women under 19 years of age in facilities in 2024. In 2024, Bergrivier improved its delivery rates for women under 19 years of age in facilities, decreasing from the highest rate in the province, 22.7 per cent, to 18.1 per cent, which remains the highest within the District. Meanwhile, Matzikama recorded the largest decline, with delivery rates for women under 19 years of age dropping by 16.9 per cent. In contrast, Saldanha Bay showed an upward trend, with delivery rates increasing from 12.7 per cent in 2023 to 13.9 per cent in 2024.

Figure 111
DELIVERY RATE TO WOMEN UNDER 19 YEARS, West Coast District, 2022- 2024



Source: Western Cape Department of Health and Wellness, 2024

A rise in this rate indicates challenges in adolescent access to sexual and reproductive health services. Teenage pregnancies are linked to increased risks of complications during pregnancy and a greater likelihood of maternal mortality. Additionally, these pregnancies often result in the mothers not finishing their education.⁴⁷

To tackle and improve the rate of teenage deliveries, it is crucial to empower young girls and adolescents with effective life skills and education on sexual and reproductive health. It is also important to improve access to appropriate sexual and reproductive health services by advancing the implementation of services that are friendly⁴⁸ to adolescents and youth at the primary health care level, and by integrating these services into the school health programme.

46 Health Systems Trust, 2023; Western Cape Department of Health, 2024

47 United Nations Population Fund, 201748

48 Health Systems Trust, 2023

Communicable diseases

HIV and tuberculosis (TB) are critical indicators of public health, reflecting the effectiveness of healthcare systems and access to essential services. TB effective treatment and HIV antiretroviral treatment (ART) are two of the tracer indicators for the Universal Health Coverage (UHC) index that form part of the infectious disease control category. Addressing HIV and TB is essential not only for improving individual health outcomes but also for strengthening overall healthcare infrastructure and promoting health equity.

In 2023/24, the WCD had a total of 37 915 people living with HIV (PLHIV), up from 20 930 in 2021. However, only 15 511 (40.9 per cent of PLHIV) registered patients were receiving Antiretroviral Therapy (ART) treatment across 47 ART clinics or treatment sites. The gap between the PLHIV and those receiving ART treatment highlights an urgent need to increase awareness and outreach to ensure the community is adequately served.

The number of ART clinics/treatment sites increased across the District, in order to match the number of registered patients, which increased by 7.3 per cent. The WCD municipal areas all showed an upward trend in the total registered patients receiving ART in 2024. This indicates a growing demand for ART services, underscoring the need for enhanced efforts to bridge the treatment gap. Saldanha Bay recorded the highest number of 4 649 total registered patients receiving ART in 2024, which has been an upward trend since 2021. Bergrivier recorded the lowest number of 1 769 total registered patients receiving ART in 2024.

Table 13
TOTAL REGISTERED PATIENTS RECEIVING ART AND NUMBER OF ART CLINICS/TREATMENT SITES, West Coast District, 2021 – 2024

Region	Total registered patients receiving ART including Departmental partners & Dept Correctional Services				Number of ART clinics/treatment sites			
	2021	2022	2023	2024	2021	2022	2023	2024
West Coast	13 154	13 533	14 453	15 511	39	38	46	47
Bergrivier	1 418	1 394	1 741	1 769	8	8	10	10
Cederberg	2 774	2 828	2 818	3 035	5	5	5	6
Matzikama	2 126	2 159	2 371	2 521	8	8	9	9
Saldanha Bay	3 952	4 094	4 261	4 649	7	6	7	8
Swartland	2 884	3 058	3 262	3 537	11	11	14	14

Source: Western Cape Department of Health and Wellness, 2024

With respect to TB, the WCD recorded an increase in registered TB patients, rising to 3,558 cases in 2024, compared to 3,612 in 2021. Despite the increase in TB cases, the District recorded a decline in the number of TB clinics and treatment sites, which have fluctuated over the past four years, dropping from 66 in 2023 to 59 in 2024. This decrease is concerning, particularly in light of the growing number of patients requiring treatment. WCD municipal areas have shown variations in the number of TB patients registered for treatment. Bergrivier and Saldanha Bay municipal areas recorded an increase in the number of registered TB patients. However, while Bergrivier also saw an increase in the number of TB treatment sites, Saldanha Bay experienced a decrease. In contrast, Cederberg, Matzikama, and Swartland reported a decline in both the number of registered TB patients and the number of TB treatment sites.

Table 14
NUMBER OF TB CLINICS/TREATMENT SITES AND NUMBER OF TB PATIENTS REGISTERED ON TREATMENT,
West Coast District, 2021 – 2024

Region	Number of TB patients registered on Treatment				Number of TB clinics/treatment sites			
	2021	2022	2023	2024	2021	2022	2023	2024
West Coast	3 612	3 686	3 748	3 558	66	63	66	59
Bergvrievier	464	541	459	551	11	9	11	12
Cederberg	603	696	669	532	10	10	9	8
Matzikama	914	801	963	800	19	18	19	15
Saldanha Bay	778	781	718	869	11	11	11	9
Swartland	853	867	939	806	15	15	16	15

Source: Western Cape Department of Health and Wellness, 2024



EDUCATION

Education is a key factor in economic prosperity because it helps people acquire skills and knowledge that can lead to better jobs, higher earnings, and a better quality of life. Education can also help drive innovation and technological breakthroughs, which can lead to greater economic growth and diversification.

This section provides a snapshot of the schooling infrastructure in WCD. Functional literacy is also reviewed as a measure to assess the ability of those over the age of 20 understand and can apply information, practically. The section also analyses the primary and high school outcomes by reviewing the pass rates for maths and language at grades three, six and nine. Retention in school is given that students who stay in school are more likely to achieve higher levels of academic and professional success. This is analysed by looking at the Grade 10 to 12 retention level. The section concludes with an analysis of matric pass rates, differentiating between a normal pass rate and one that would qualify students for a bachelor's degree.

Schooling infrastructure

Among the 123 schools in the District, there are 81 primary schools, while the remainder are high schools. Non-fee-paying schools constitute a larger proportion of the schools, equal to 83.9 and 52.3 per cent at primary and high school, respectively. Most of the schools are in Swartland. Depending on location, the schools can also service students from other municipal areas.

Table 15
NUMBER OF PRIMARY AND HIGH SCHOOLS, West Coast District, 2023

	West Coast	Bergvrievier	Cederberg	Matzikama	Saldanha Bay	Swartland
High School	42	8	6	10	10	8
Fee charging	20	5	3	3	5	4
No Fee	22	3	3	7	5	4
Primary School	81	11	16	16	14	24
Fee charging	13	1	1	2	5	4
No Fee	68	10	15	14	9	20
Grand Total	123	19	22	26	24	32

Source: Western Cape Education Department, 2024

Functional literacy

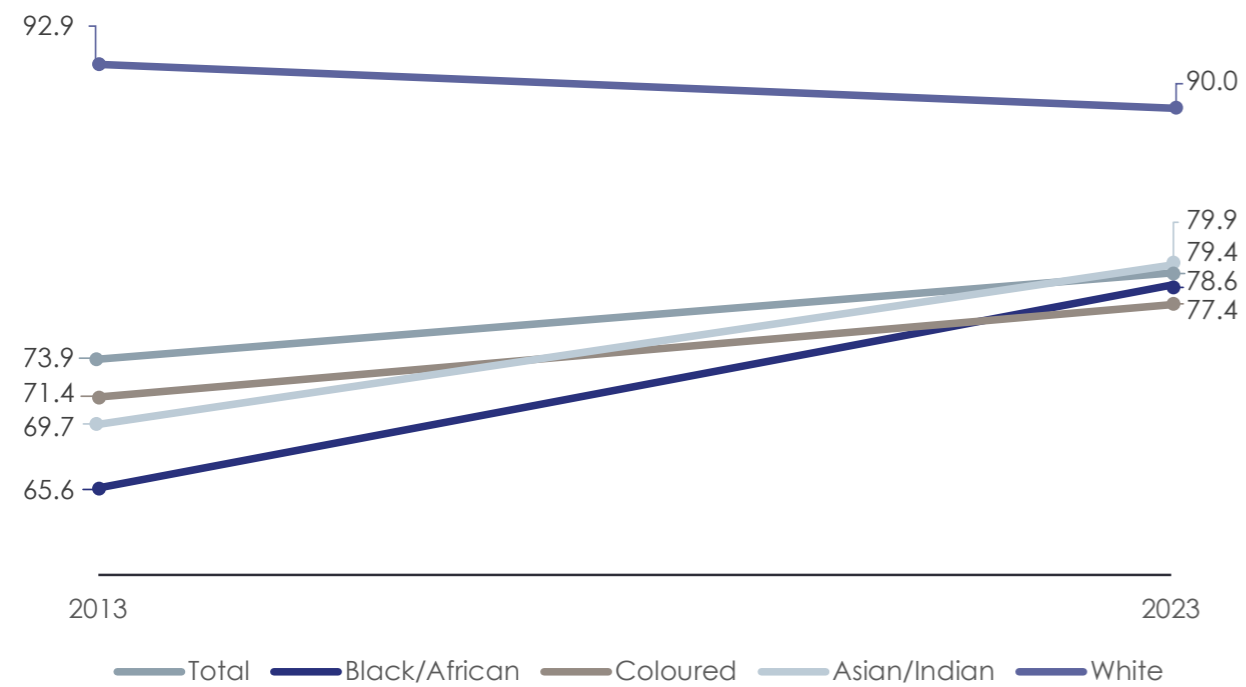
Functional literacy refers to the ability of an individual to read, write, and engage with written texts in a way that allows them to effectively manage daily tasks and participate fully in society. This includes understanding and using information in various contexts, such as in the workplace, in educational settings, and in everyday life. Functional literacy goes beyond basic reading and writing skills; it encompasses the capacity to comprehend and apply information in practical situations.⁵²

⁵² Erik Jacobson, in International Encyclopedia of Education (Fourth Edition), 2023

In the last decade, the functional literacy rate in the WCD has shown a marginal increase, from 74 per cent to 80 per cent by the end of 2023. While all groups experienced some growth, the Black African population exhibited the most significant improvement, rising from 65.6 per cent in 2013 to 79.2 per cent in 2023. The White population, which had the highest rate in 2013 at 92.9 per cent, experienced a slight decrease but still maintained the highest rate in 2023 at 90 per cent. The Coloured and Asian and Indian populations also displayed positive trends, with functional literacy rates increasing from 71.4 per cent to 78.6 per cent and 69.7 per cent to 77.4 per cent respectively, indicating progress in literacy levels within these groups.

The general improvement in literacy rates has been driven by several factors, including increased access to education in disadvantaged communities and government initiatives like the National Literacy Strategy.⁵³ Community-based programmes and partnerships among schools, NGOs, and local governments have also played a crucial role in addressing the unique needs of various racial groups.⁵⁴

Figure 112
FUNCTIONAL LITERACY RATE, West Coast District, 2013 – 2023



Source: Quantec, 2024

To bridge the educational gap, it is essential to address the challenges related to access to education and the development of literacy skills. A critical aspect of this initiative is ensuring that school-aged children within the community are enrolled in and have access to educational institutions. The scholar transport support provided by the DoE is instrumental in facilitating this access.⁵⁵

53 The National Literacy Strategy
54 The Role of NGOs in Supporting Education in Africa
55 WCED Policy on Learner Transport Scheme

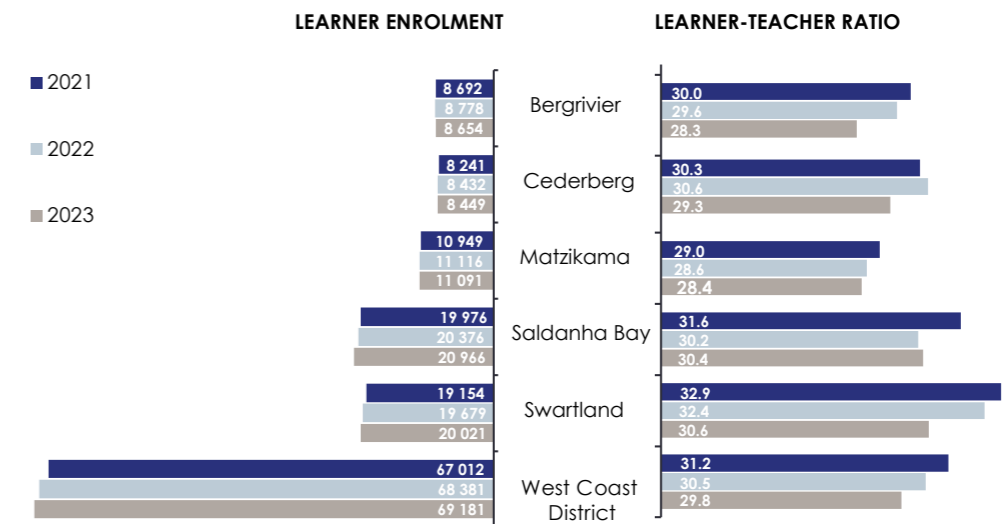
Learner enrolment and learner-to-teacher ratio

In a concerted effort to combat youth unemployment and offer crucial classroom assistance, the WCED recruited 20 500 education assistants for the 2023 school year. This initiative falls under the Presidential Youth Employment Initiative (PYEI) and aims to support schools throughout the Province. This programme addresses the need for additional classroom support. It is crucial for creating work opportunities for unemployed youth throughout the Western Cape.⁵⁶

Between 2021 and 2023, learner enrolment in the WCD recorded a steady increase across all municipal areas to accommodate the expanding student population. The expanding learner population could be attributed to a number of factors, such as a rising birth rate, migration to the region, or increased access to education for students previously excluded.

The learner-to-teacher ratio has improved across the region, with the exception for the one in Saldanha Bay which recorded a slight worsening. This indicates that the DoE has made concerted efforts to increase the teaching resources in school to meet the growing student population. While the DoE recommends a learner-to-teacher ratio of 40:1 for ordinary primary schools and 35:1 for ordinary high schools.⁵⁷ The WCD municipal areas' total of 29.7 is well below this recommendation.

Figure 113
LEARNER ENROLMENT AND LEARNER-TEACHER RATIO, West Coast District, 2021 – 2023



Source: Western Cape Education Department, 2024

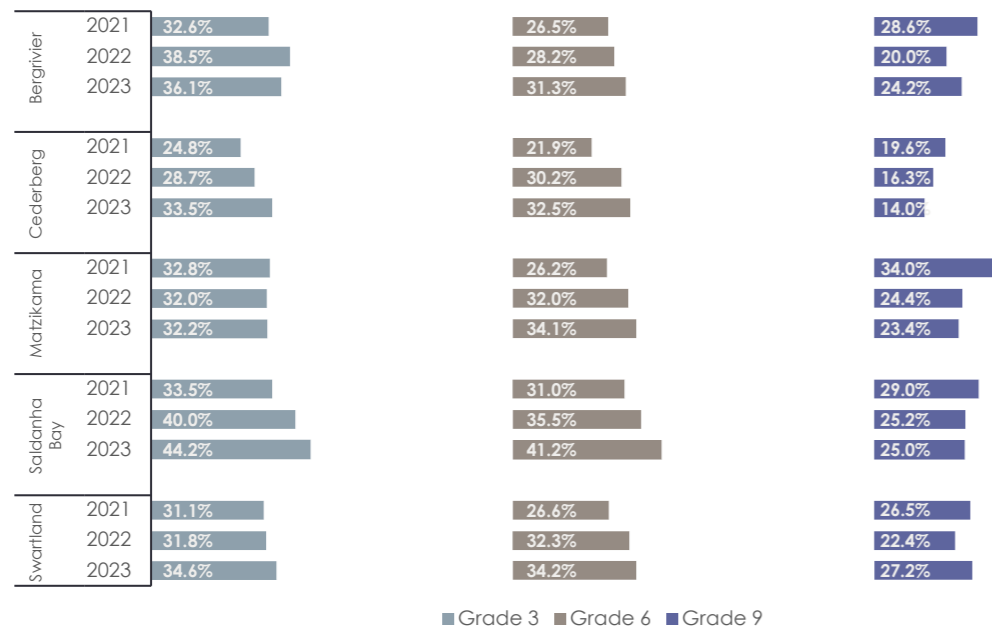
56 Western Cape Education Department, 2022
57 Department of Basic Education, 2010. Education for All (EFA) country report.

Primary and high school educational outcomes

While the learner enrollment and learner-teacher ratio do not provide information about the quality of education changes, the pass mark data for English Language and Mathematics are critical indicators of education quality. Proficiency in these areas is fundamental for personal, academic, and professional success as they are essential skills needed for effective communication, problem-solving, critical thinking, and learning.

For Mathematics, Grade 9 pass rates were generally lower than those of Grade 3 and Grade 6 across all municipal areas over the past three years. Saldanha Bay consistently achieves the highest pass rates across all grades and years, indicating a strong educational foundation. Conversely, Matzikama has shown a decline in Grade 9 pass rates from 2021 to 2023, signalling a potential issue that needs attention. Cederberg has demonstrated significant improvement in Grade 9 pass rates during the same period, a positive trend worth investigating for contributing factors. The pass rates for all three grades fluctuate across municipal areas, suggesting the need for targeted interventions to enhance educational outcomes.

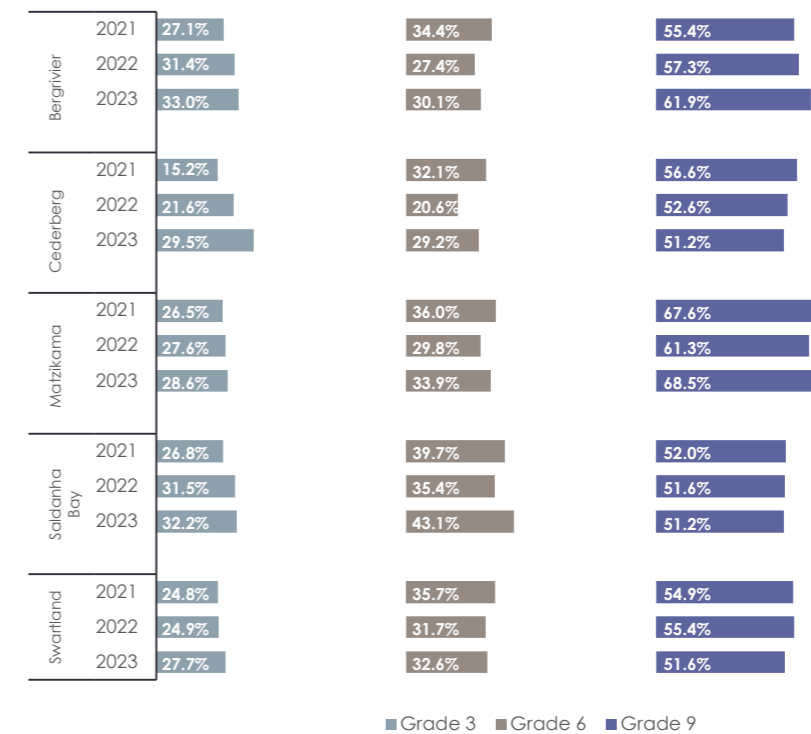
Figure 114
GRADE 3, 6 AND 9 MATHEMATICS PASS RATES, West Coast District, 2021-2023



Source: Western Cape Education Department, 2024

Language pass rates are generally high, with most schools achieving over 50 per cent in all grades. However, there are notable differences between municipal areas and grades. Grade 9 consistently has the highest pass rates across all areas, most likely because older students have had more time to develop their language skills. Bergivier boasted the highest pass rates in all three grades over the past three years, indicating a strong language program. Matzikama had the lowest pass rates in grades 3 and 6 in 2021 and 2022, but showed significant improvement in 2023, suggesting that new initiatives have enhanced language instruction. Cederberg consistently has the lowest pass rates in grade 3 and also struggles in grade 6, indicating challenges with language instruction. Saldanha Bay and Swartland have similar pass rates across all grades, with higher rates in grade 9 and lower rates in grade 3, reflecting similar patterns in language acquisition.

Figure 115
GRADE 3, 6 AND 9 LANGUAGE PASS RATES, West Coast District, 2021-2023



Source: Western Cape Education Department, 2024

The pass rates of Grade 9 learners in these subjects have significant implications for their progression to the final years of schooling. Poor performance during this pivotal year increases the risk of learners dropping out before entering the further education and training (FET) phase. A study by the South African Department of Basic Education highlights that poor performance in key subjects during Grade 9 can lead to increased dropout rates before learners reach the FET phase.⁵⁸

High school retention rates

The Grade 10 to 12 retention rate is obtained by comparing the number of Grade 12 learners of a particular cohort with the number of Grade 10 learners from the same cohort who were present two years earlier. This shows the proportion of students who progressed to Grade 12.⁵⁹

The retention rate of schools in the WCD is generally high, with most municipal areas showing rates above 70 per cent. Over the past three years, the retention rate has remained consistently high and has increased slightly, indicating a strong school system that keeps students engaged. From 2021 to 2023, most municipal areas have seen an increase in retention rates, suggesting improvements in the school system's ability to retain students. Moreover, this is partly explained by the optimal learner-teacher ratio that ensures that students are well engaged.

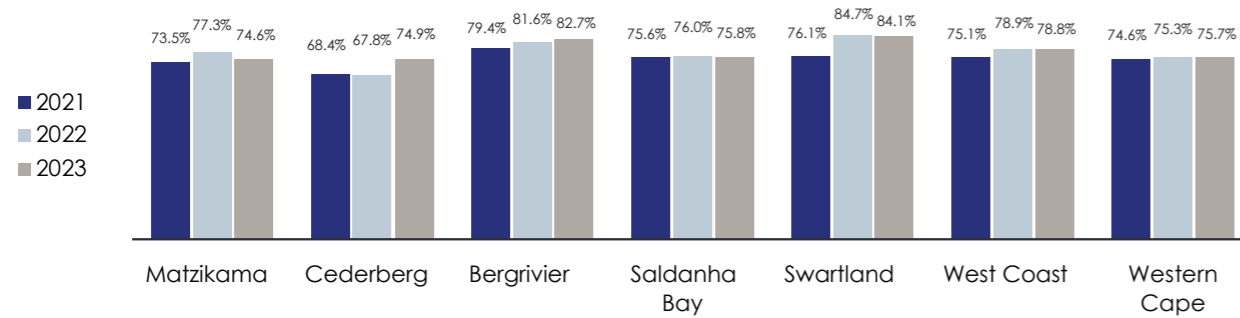
In 2023, Swartland had the highest retention rate at 84.1 per cent, followed by Bergivier at 82.7 per cent, and Matzikama at 74.6 per cent. The lowest retention rates were in Cederberg at 74.9 per cent, Saldanha Bay at 75.8 per cent, and Western Cape at 75.7 per cent. The high retention rates may be attributed to well-equipped schools with qualified teachers, supportive communities that value education, and the relative prosperity of the WCD, which provides students with access to

⁵⁸ Department of Basic Education, 2010. Education for All (EFA) country report.

⁵⁹ South African Department of Basic Education. (2014). National Senior Certificate: Technical Report.

employment opportunities. Overall, the WCD has a strong school system with high retention rates and an encouraging trend of improvement over the past three years, indicating effective efforts in retaining students and providing quality education.

Figure 116
GRADE 10 TO 12 RETENTION RATE, West Coast District, 2021 – 2023



Source: Western Cape Education Department, 2024

Matric educational outcomes

To successfully complete Grade 12 and earn a National Senior Certificate (NSC), a student needs to score a minimum of 40 per cent in three subjects: at least 30 per cent in their home language; 30 per cent in two additional subjects, and 20 per cent in a sixth subject. A matriculant who obtains a bachelor's pass can enrol in a bachelor's degree course at a university. A learner must pass six of their seven subjects to get a bachelor's pass, achieving at least 40 per cent for the home language, achieve at least 50 per cent in four subjects, achieve at least 30 per cent in one other subject, achieve at least 30 per cent in the language of learning.

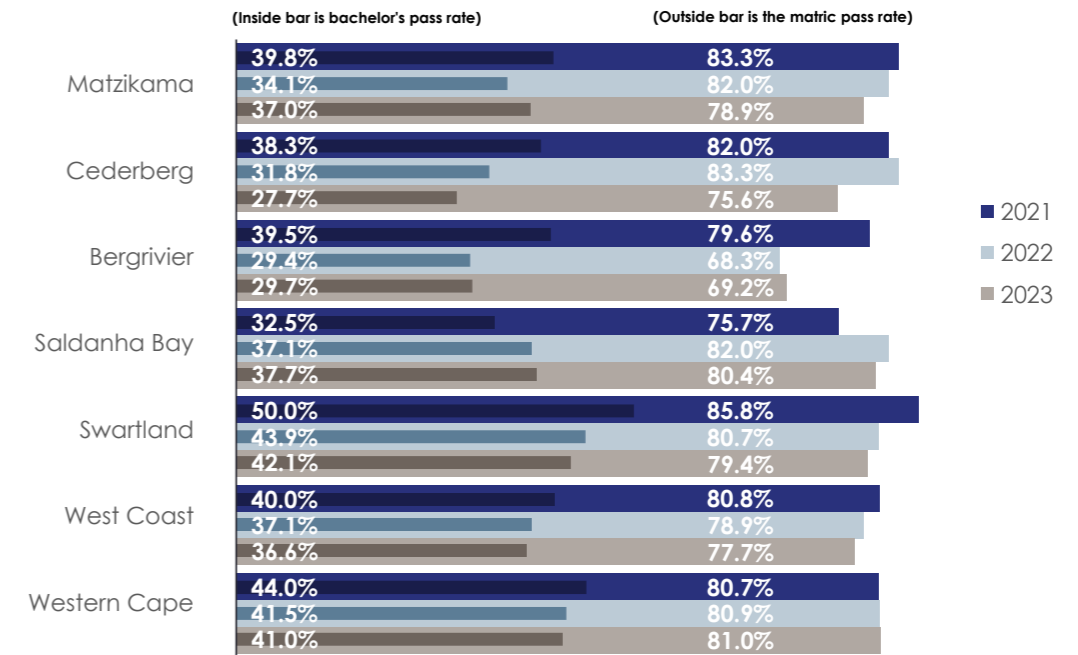
The matric pass rates are higher than bachelor's pass rates in the WCD, with the highest pass rate for matric in Swartland (85.8 per cent) and the lowest in Bergrivier (68.3 per cent). The highest bachelor's pass rate was found in Matzikama (39.8 per cent), and the lowest in Cederberg (27.7 per cent).

Matzikama has the highest bachelor's pass rate (39.8 per cent), but the lowest matric pass rate in the District. This might indicate that while the quality of education in the area is good, there are challenges with students' overall academic performance. Swartland has the highest matric pass rate (85.8 per cent), suggesting it has a robust education system. However, it also has a lower bachelor's pass rate compared to other areas, indicating that students may need more support in their pursuit of higher education. Bergrivier has the lowest matric pass rate (68.3 per cent) and a low bachelor's pass rate (29.4 per cent), which suggests that the area faces major challenges in education and needs significant investment in infrastructure, resources, and teacher development.

All areas have higher matric pass rates than bachelor's pass rates. This highlights the challenge

of preparing students for tertiary education and suggests a need for improved strategies and support for students to pursue higher education. There are significant differences in pass rates across the municipal areas, suggesting disparities in access to quality education, resources, and socio-economic factors. This points to a need for a more equitable approach to education and investment in underprivileged areas. The gap between matric pass rates and bachelor's pass rates is wider in some areas than in others. This gap can be attributed to a range of factors, including access to resources, quality of teaching, and socio-economic factors.

Figure 117
GRADE 12 PASS RATE AND BACHELOR'S PASS RATE, West Coast District, 2021 – 2023



Source: Western Cape Education Department, 2024

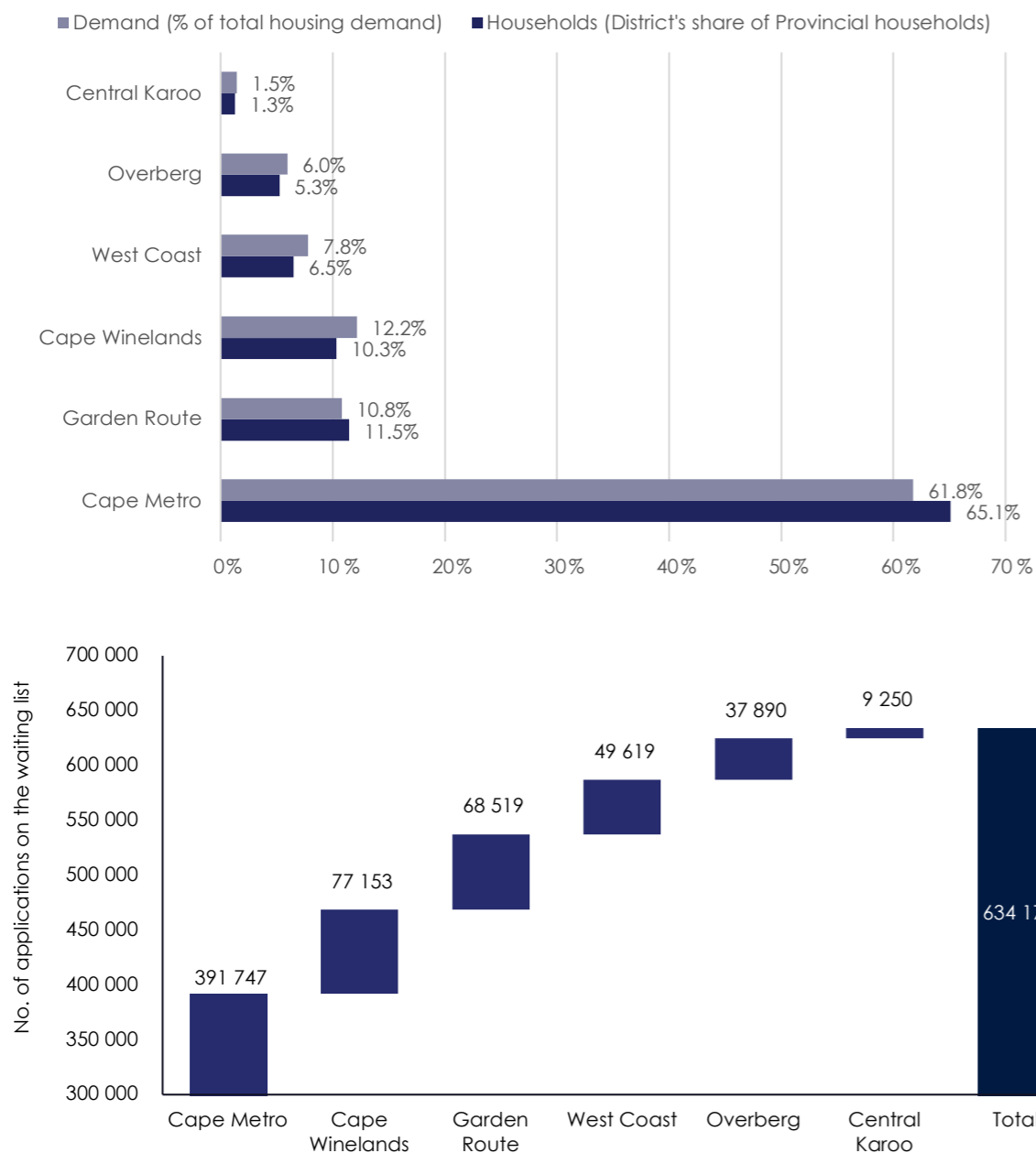


HOUSING AND ACCESS TO BASIC SERVICES

Housing

Within the Province, demand for housing is measured by the number of applications on the waiting list at the Western Cape Housing Demand Database. Housing demand in the WCD is quite low compared to other districts and the Metro, accounting for 6 per cent of applications. Notably, the WCD recorded a significant increase in demand for property relative to other districts in the Province between 2022 and 2023. This burgeoning demand in the region reflects the broader implications of urbanisation and the pressing need for effective housing solutions.

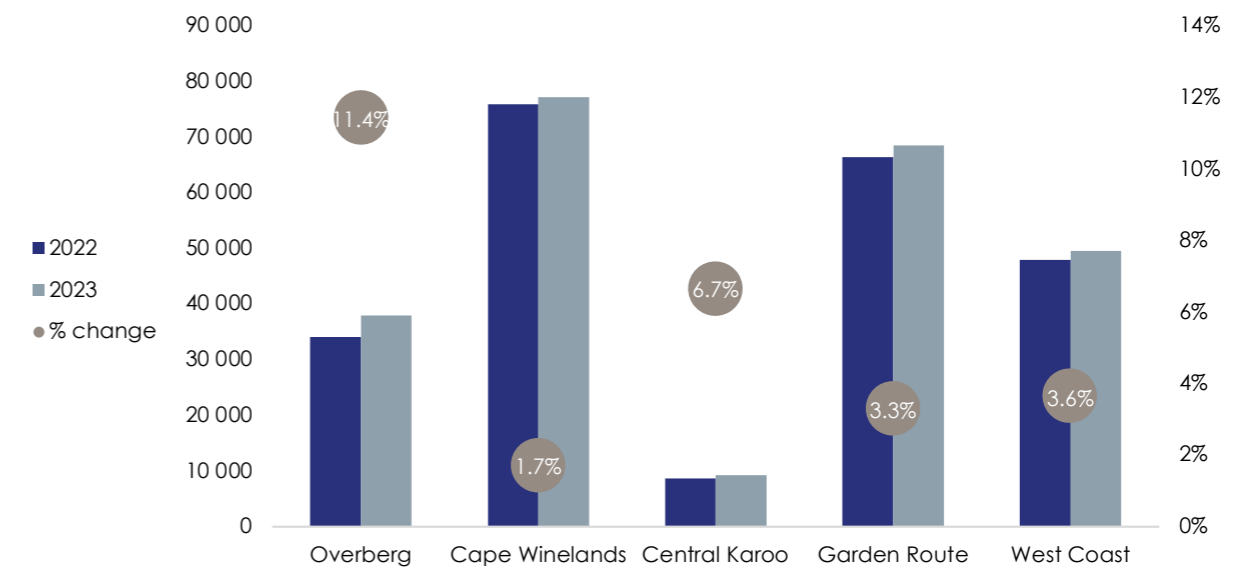
Figure 118
HOUSING DEMAND, 2023



Source: Western Cape Housing Demand Database, 2024

Across the districts, the largest demand for housing was recorded in the OD, which recorded a year-on-year change of 11.4 per cent increase. This was followed by CKD, which recorded an increase in demand of 6.7 per cent in 2023, although it was off a low base. The increase in demand in the GRD and WCD is quite modest, roughly 3.3 per cent and 3.6 per cent. The CWD recorded the least growth in housing demand, at 1.1 per cent. The demand for housing is driven by the proportion of informal dwellers and the inability of formal housing markets to meet the needs of low-income populations.

Figure 119
HOUSING DEMAND, West Coast District, 2022-2023

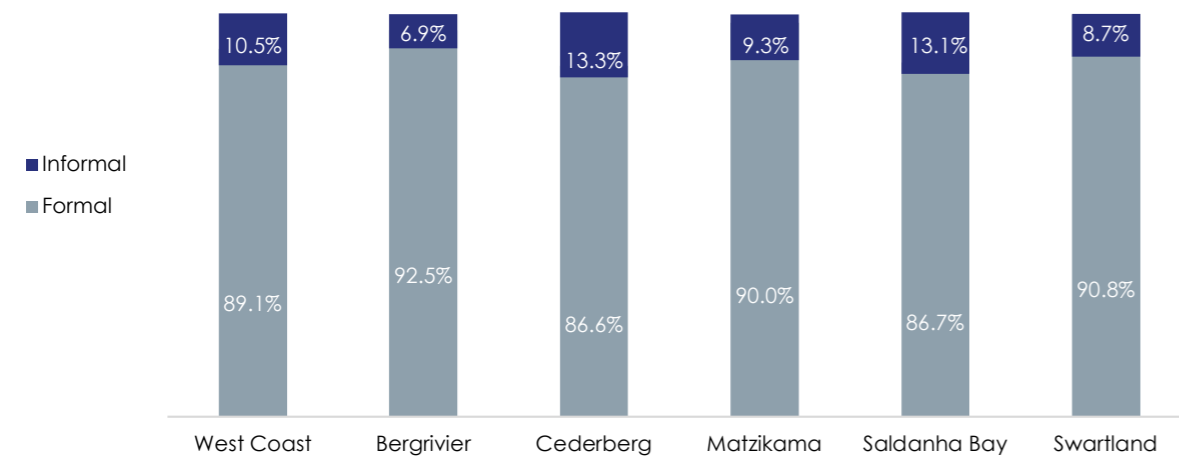


Source: Western Cape Housing Demand Database, 2024. Note: Data is unavailable for Cape Metro in 2022.

The housing sector in the WCD saw a 3.6 per cent increase in property demand between 2022 and 2023. In absolute terms, the District's property demand ranks among the top three districts in the Western Cape Province, following the CWD and the GRD. This can be attributed to the fact that it is home to approximately 11.6 per cent of the province's population. Additionally, population growth and urbanisation have significantly contributed to the increased demand for housing in the District.

At the District level, 89 per cent of dwellings are formal, which is higher than the Provincial average of 84 per cent. However, housing structures vary spatially both between and within local municipal areas. Towns such as Swartland, Saldanha Bay, and Matzikama are experiencing rapid urbanisation, with informal settlements emerging near urban centres. This is particularly evident in Saldanha Bay, where employment opportunities, access to services, and infrastructure are attracting residents. While the Cederberg has a high informal settlement rate of 13 per cent, the demand for housing has remained relatively stable from 2021 to 2023, with less than a 3 per cent increase per year.

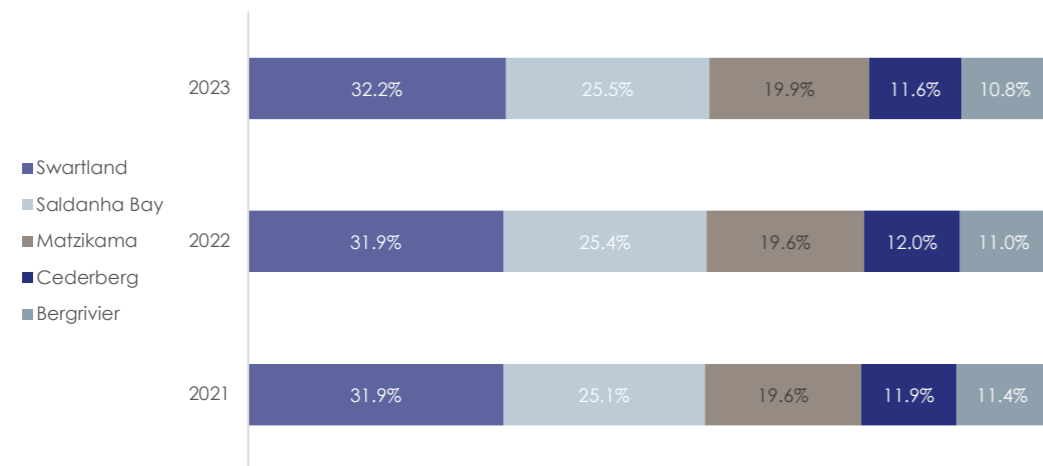
Figure 120
FORMAL DWELLINGS AND INFORMAL DWELLINGS, West Coast District, 2023



Source: Western Cape Housing Demand Database, 2024

Over the past three years, three municipal areas have consistently experienced the highest housing demand within the WCD: Swartland (32 per cent), Saldanha Bay (25 per cent), and Matzikama (25 per cent). The consistent demand for housing in these areas is largely attributed to rapid urbanisation within the towns in these areas, which has resulted in a high number of people migrating to these areas.

Figure 122
PROPOSITION OF MUNICIPAL DEMAND, West Coast District, 2021-2023



Source: Western Cape Housing Demand Database, 2024.

Housing subsidies are a key tool the government uses to improve access to housing. However, the income thresholds for these subsidies can limit access. Many deserving households earn more than the upper limit for the subsidy but do not qualify for commercial home mortgages, leaving them in a vulnerable position. The recently launched Housing Market Studies will be critical in shaping housing policies across the various districts in the Province (see textbox below).

Input on the Municipal Economic Review and Outlook: Housing Market Study Round II

The Western Cape Government has initiated the second round of Housing Market Studies (HMS) to support the ongoing implementation of the Western Cape Inclusionary Housing Policy Framework (WCIHPF). These studies, scheduled to conclude by the end of the 2024/25 financial year, are essential for understanding the dynamics of local housing markets and for shaping policies aimed at improving housing affordability and inclusivity across the province. The Saldanha Bay and Swartland draft Housing Market Studies have been finalised, and are two of seven municipalities participating in this critical initiative.

Purpose of the Housing Market Study

The HMS aims to provide a comprehensive analysis of the residential property market by evaluating housing supply and demand across income segments, identifying affordability gaps, and examining the local housing stock, both owned and rental. The study is structured to answer pivotal questions, such as:

1. What types of housing are available, and what are the market trends in terms of value, location, and typology?
2. Are housing supply levels adequate to meet the needs of all income groups?
3. How are residents accessing housing, and is it affordable now and into the future?
4. What are the key drivers of housing development, and where are the opportunities for inclusionary housing?

By exploring these areas, the HMS informs municipalities on the effectiveness of their housing markets and identifies interventions to improve access to affordable and inclusive housing. The HMS also plays a crucial role in aligning housing delivery with spatial planning objectives, such as those outlined in Municipal Spatial Development Frameworks (MSDFs), Integrated Development Plans (IDPs), and other housing sector plans.

Use of the HMS

The findings from the Housing Market Studies will provide the municipality with evidence-based insights necessary for policy formulation, specifically enabling it to develop an Inclusionary Housing or Inclusionary Zoning Policy. By identifying where affordable housing is lacking and highlighting gaps in the market, the study will enable the municipalities to prioritize areas for inclusionary housing and determine income segments that require targeted interventions. It will also guide decisions regarding land use rights and incentives to stimulate affordable housing development.

Additionally, the HMS output will serve as a foundation for broader municipal policies aimed at promoting spatial justice and ensuring that housing markets function in a manner that supports both social and economic objectives. It will also highlight the potential for public-private partnerships and other collaborative approaches to address housing needs.

The Importance to the Inclusionary Housing Policy

A critical outcome of the HMS is its contribution to the Inclusionary Housing Policy development process. The Cabinet adopted Western Cape Inclusionary Housing Policy Framework (WCIHPF) emphasizes the role of inclusionary housing in achieving spatially efficient and economically sustainable towns and cities. The HMS helps municipalities, like Swartland and Saldanha Bay, by providing the necessary data to craft policies that respond to local housing dynamics. The studies' focus on affordability, housing supply, and demand will allow for a nuanced understanding of which income groups should benefit from inclusionary housing, ensuring policies are both equitable and practical.

The importance of this process is underscored by findings from earlier studies, such as those in Stellenbosch, where significant affordability gaps were identified. In Stellenbosch, the study revealed that a large portion of the population could not access market-driven housing solutions, necessitating the inclusion of more affordable housing in new developments. In response to this, Stellenbosch developed its Inclusionary Zoning Policy. This aligns with the broader goal of the WCIHPF to ensure inclusive, accessible housing markets that cater to a wide range of income groups. Similarly, the Overstrand HMS will be crucial in shaping policies that promote balanced, inclusive growth in the housing market.

The Housing Market Study will play a key role in helping the Municipality align its housing strategy with both provincial goals and local realities, particularly in supporting the development of an effective Inclusionary Housing Policy. This evidence-based approach is essential for creating a more inclusive and spatially just housing market in the municipality. For example, the Swartland and Saldanha Housing Market Study showed that:

Findings from the Swartland Housing Market Study

In 2024, the Swartland Housing Market Study was developed. This study looked at the housing market in the towns of Malmesbury, Darling, Riebeeck-Kasteel and Moorreesburg. Some of the high-level findings from this study are:

- The housing stock in Swartland mainly consists of freehold properties. Malmesbury and Moorreesburg also have small shares of freehold estate properties, while sectional titles are generally less prevalent. Property values in higher-income areas are concentrated in the R900,000 - R3million market segments, while lower-income areas mainly have properties valued below R300,000.
- There is very little housing stock in the R300,000 to R900,000 market segments.
- Market activity in these four towns mirrors their relatively rural character: the rental market is limited, and transaction volumes are low, particularly outside of Malmesbury. However, there is a noticeable increase in activity, especially in high-end properties, driven by strong investor and consumer confidence.
- The high-end and luxury markets have an oversupply of properties, while the middle and lower-end markets experience an undersupply. This imbalance is evident from the high incidences of backyard dwellings in areas like Malmesbury West, Nuwedorp in Darling, Rosenhof in Moorreesburg, and Esterhof in the Riebeeck Valley.
- The table below illustrates the difference between housing demand and housing supply in various market segments.

Table 16
THE DIFFERENCE BETWEEN HOUSING DEMAND AND HOUSING SUPPLY IN VARIOUS MARKET SEGMENTS, Swartland, 2024

Market segment	Minimum monthly household income needed	Malmesbury				Darling				Riebeeck-Kasteel				Moorreesburg			
		Number of properties in market segment	% share of total properties in market	Number of households with this income	% of households with this income	Number of properties in market segment	% share of total properties in market	Number of households with this income	% of households with this income	Number of properties in market segment	% share of total properties in market	Number of households with this income	% of households with this income	Number of properties in market segment	% share of total properties in market	Number of households with this income	% of households with this income
< 100 000	1,974	964	10.0%	13	0.1%	18	0.6%	-	-	372	27.6%	-	-	104	2.9%	13	0.4%
100 000 - 200 000	5,922	2,268	23.4%	4,140	42.7%	1,413	50.1%	1,587	61.7%	1,60	11.9%	667	40.3%	1,226	34.7%	1,461	47.7%
200 000 - 300 000	9,870	1,048	10.8%	1,774	18.3%	11	0.4%	343	13.3%	8	0.6%	462	27.9%	143	4.0%	622	20.3%
300 000 - 600 000	17,765	1,379	14.2%	1,168	12.1%	133	4.7%	449	17.5%	135	10.0%	182	11.0%	216	6.1%	769	25.1%
600 000 - 900 000	29,409	802	8.3%	-	-	316	11.2%	-	-	4	0.3%	-	-	500	14.2%	-	-
900 000 - 1.2 million	41,452	517	5.3%	1,211	12.5%	150	5.3%	192	7.5%	15	1.1%	345	20.8%	459	13.0%	198	6.5%
1.2 - 1.5 million	53,296	478	4.9%	1,380	14.2%	178	6.3%	-	-	25	1.9%	-	-	437	12.4%	-	-
1.5 million - 3 million	88,826	1,955	20.2%	-	-	553	19.6%	-	-	464	34.4%	-	-	379	10.7%	-	-
3 - 5 million	157,913	253	2.6%	-	-	32	1.1%	-	-	143	10.6%	-	-	36	1.0%	-	-
> 5 million	197,391	21	0.2%	-	-	16	0.6%	-	-	23	1.7%	-	-	32	0.9%	-	-

Source: Housing Market Studies Draft Swartland Report, 2024

Assuming the minimum monthly household income required to purchase property in various market segments: • Loan term of 20 years • Deposit of 10% of the property value • No subsidy or government assistance • Interest rate of 10%, reflecting a balance between long-run average rates and current economic conditions • Premium-to-income ratio of 22%

Key observations from this table are:

- **Housing Stock Composition:** The market predominantly comprises freehold properties, with limited estate and sectional title options. Higher-income areas mainly have properties valued between R900 000 and R3 million, while lower-income properties are typically under R300 000. Housing supply between R300 000 and R900 000 is notably scarce.

The follow Demand-Supply imbalances exists in the housing markets of the following towns:

- **Malmesbury:** Significant undersupply in the R100 000 - R200 000 market segment, where demand (4 140 households) far exceeds supply (2 268 properties).
- **Darling:** High demand for properties in the R300 000 - R600 000 range (449 households) versus only 113 available properties.
- **Riebeeck-Kasteel:** Shortage in the R900 000 - R1.2 million housing market segment range, with demand for 345 properties but supply of just 15.
- **Moorreesburg:** Strong demand (769 households) in the R300 000 - R600 000 range, yet only 216 properties available.
- **Affordability Gaps:** Across all towns, a gap exists in the R100 000 - R300 000 segment, indicating insufficient housing for lower-income households. Conversely, higher-income segments above R1.5 million show excess supply relative to low demand.
- **Entry-Level Housing Need:** 61.1 per cent of Malmesbury, 73.7 per cent of Darling, 43.1 per cent of Riebeeck-Kasteel, and 80 per cent of Moorreesburg households need entry-level housing (< R300 000). However, only 44 per cent of Malmesbury's, 51 per cent of Darling's, 41 per cent of Riebeeck-Kasteel's, and 42 per cent of Moorreesburg's housing stock is in this segment.

Findings from the Saldanha Bay Municipality Market Housing Market Study

In 2024, the Saldanha Bay Housing Market Study was developed. This study found that Saldanha Bay's housing market is distributed across several urban nodes of varying size, economic function, and residential character. The housing demand, supply, and market activity in the municipality is therefore shaped by the relative functioning and hierarchy of these nodes and areas. The main towns in the area are Vredenburg, Saldanha, which are identified as areas of major growth; Langebaan and St Helena Bay which are areas of intermediate growth, and Hopefield, Paternoster, and Jacobs Bay, which are areas of more modest growth. Some of the high-level findings from this study are:

- The largest share of demand for affordable units is in Saldanha and Vredenburg. These towns have higher economic potential and are expected to see the most significant household growth in the coming years, while also absorbing demand from smaller nodes and surrounding rural areas.
- The largest share of demand for affordable units is in Saldanha and Vredenburg. These towns have higher economic potential and are expected to see the most significant household growth in the coming years, while also absorbing demand from smaller nodes and surrounding rural areas.
- The property markets in Saldanha Bay Municipality display significant differences in price ranges and development activity, broadly aligned with the towns' roles as holiday destinations or local economic centres. Langebaan, St Helena Bay, and Jacobs Bay have a higher concentration of high-end and luxury properties, while Vredenburg and Saldanha have larger stocks of entry-level and affordable properties. A common trend across the towns is the dominance of freehold properties.
- Private development is more concentrated in Langebaan and St Helena Bay, particularly in the high-end and luxury segments, whereas the government is a larger player in housing development in Hopefield, Saldanha, Vredenburg, and Paternoster. Indicators of market activity, such as churn rates, resale transactions and new property developments are generally higher in Langebaan and St Helena Bay, indicating that these towns have more active and robust property markets.
- Affordability patterns vary across the dispersed towns, as each has distinct market characteristics and needs. Vredenburg, Saldanha Bay, Langebaan, and St Helena Bay have significant affordability gaps at the lower end, where households able to afford properties under R300 000 exceed supply. Middle-income gaps differ, with Vredenburg showing larger gaps for properties between R300 000 and R600 000, while Saldanha Bay and Langebaan have more gaps for properties between R600 000 and R900 000.
- There is need for municipal-level support and incentives to target interventions for the different residential markets in Saldanha Bay. This could be achieved by leveraging existing subsidies, and incentives, to realise the intentions outlined in the MSDF and housing sector plan for the different areas. There is also need for municipality-level efforts to enhance private-sector investment for different income groups.

The table below illustrates the difference between housing demand and housing supply in various market segments in Saldanha Bay.

Table 17
THE DIFFERENCE BETWEEN HOUSING DEMAND AND HOUSING SUPPLY IN VARIOUS MARKET SEGMENTS, Saldanha Bay, 2024

Household income bracket	Market segment	Minimum monthly income	Vredenburg						Saldanha						Langebaan			St Helena Bay		
			Number of household income bracket	% of total households	Number of properties in market segment	% of properties in market	Number of household income bracket	% of total households	Number of properties in market segment	% of properties in market	Number of household income bracket	% of total households	Number of properties in market segment	% of properties in market	Number of household income bracket	% of total households	Number of properties in market segment	% of properties in market		
R0 - R4 666	< 100 000	R1 974	3 781	27.1%	256	2.8%	3 044	27.2%	6	0.1%	-	-	2	-	2 477	36.1%	19	0.2%		
R4 667 - R11 416	100 000 - 200 000	R5 922	6 340	45.5%	2 800	31.0%	4 197	37.5%	1 558	21.6%	666	9.8%	1	-	1 207	17.6%	1 148	12.4%		
R11 417 - R22 500	200 000 - 300 000	R9 870	197	1.4%	65	0.7%	703	6.3%	803	11.1%	260	3.8%	171	1.9%	1 122	16.3%	186	2.0%		
R22 501 - R36 666	300 000 - 600 000	R17 765	2 098	15.1%	1 059	11.7%	1 004	9.0%	1 501	20.8%	547	8.0%	315	3.5%	557	8.1%	414	4.5%		
R36 667 - R51 666	600 000 - 900 000	R29 609	1 333	9.6%	1 567	17.3%	1 749	15.6%	572	7.9%	2 568	37.6%	461	5.2%	714	10.4%	608	6.6%		
R51 667 - R71 666	900 000 - 1 200 000	R41 452	185	1.3%	1 045	11.6%	260	2.3%	901	12.5%	1 179	17.3%	476	5.4%	55	0.8%	943	10.2%		
R71 667 - R100 000	1 200 000 - 1 500 000	R53 296	-	-	856	9.5%	228	2.0%	721	10.0%	1 605	23.5%	818	9.2%	122	1.8%	1 481	16.1%		
R100 001 - R145 833	1 500 000 - 3 million	R88 826	-	-	1 205	13.3%	-	-	996	13.8%	-	-	4 071	45.8%	47	0.7%	3 944	42.8%		
R145 834 - > 5 million	3 - 5 million	R157 913	-	-	93	1.0%	-	-	83	1.2%	-	-	2 308	26.0%	562	8.2%	386	4.2%		
		R197 391	-	-	99	1.1%	-	-	69	1.0%	-	-	266	3.0%	-	-	93	1.0%		

Why are there more properties than households in the higher segments?

The Spatial Economic Activity Data (SEAD) provides municipal-level data on the number of jobs within different wage bands using administrative tax records. In 2023, SEAD reported only 1 198 employees in Saldanha Bay Municipality earning over R51 200 per month. This represents only about 10% of the households that the GTI dataset identifies in this income bracket. Despite potential differences in this income bracket the significant gap between the dataset indicates that many property owners in the municipality earn their income elsewhere. In addition to the caveats discussed above, and those in Appendix A, this suggests that the gap between the number of households able to afford properties based on their income and the number of properties available is significantly influenced by the presence of second homes, retirees, and inherited wealth.

Household income bracket	Market segment	Minimum monthly income	Hopefield				Paternoster				Jacobs Bay					
			Number of households in income bracket	% of total households	Number of properties in market segment	% of properties in market	Number of households in income bracket	% of total households	Number of properties in market segment	% of properties in market	Number of households in income bracket	% of total households	Number of properties in market segment	% of properties in market		
R0 - R4 666	< 100 000	R1 974	-	-	-	117	100%	-	-	-	-	-	-	-	-	-
R4 667 - R11 416	100 000 - 200 000	R5 922	1 437	62.1%	528	27.0%	566	60.9%	199	17.0%	-	-	-	-	-	-
R11 417 - R22 500	200 000 - 300 000	R9 870	365	15.8%	8	0.4%	282	30.3%	40	3.4%	-	-	-	-	-	-
R22 501 - R36 666	300 000 - 600 000	R17 765	511	22.1%	283	14.5%	-	-	81	6.9%	-	-	-	-	-	-
R36 667 - R51 666	600 000 - 900 000	R29 609	-	-	533	27.2%	-	-	14	1.2%	-	-	1	0.2%	-	-
R51 667 - R71 666	900 000 - 1.2 million	R41 452	-	-	172	8.8%	82	8.8%	13	1.1%	409	100.0%	2	0.3%	-	-
R71 667 - R100 000	1.2 - 1.5 million	R53 296	-	-	316	16.1%	-	-	58	4.9%	-	-	2	0.3%	-	-
R100 001 - R145 833	1.5 million - 3 million	R88 826	-	-	105	5.4%	-	-	396	33.7%	-	-	351	57.9%	-	-
R145 834	> 3 million	R157 913	-	-	10	0.5%	-	-	200	17.0%	-	-	234	38.6%	-	-
	> 5 million	R197 391	-	-	2	0.1%	-	-	56	4.8%	-	-	16	2.6%	-	-

Source: Housing Market Studies Draft Saldanha Bay Report, 2024

Assuming the minimum monthly household income required to purchase property in various market segments: • Loan term of 20 years • Deposit of 10 per cent of the property value • No subsidy or government assistance • Interest rate of 10 per cent, reflecting a balance between long-run average rates and current economic conditions • Premium-to-income ratio of 22 per cent

Key observations from this table are:

Housing Stock Composition:

- A significant portion of housing stock in Vredenburg (35 per cent), Saldanha (33.1 per cent), Hopefield (28.9 per cent), and Paternoster (30 per cent) falls under the entry-level market segment (below R300 000).
- In contrast, Langebaan has a high concentration (84 per cent) of properties in the luxury market (over R1.2 million).
- Properties in the affordable segment (R300 000 - R600 000) are limited, especially in Langebaan (4 per cent) and Paternoster (7 per cent).

The follow Demand-Supply imbalances exists in the housing markets of the following towns:

- There is a consistent undersupply of properties for lower-income households, particularly in the R100 000 - R300 000 and R300 000 - R600 000 segments.
- Conversely, high-end and luxury properties (above R1.5 million) are oversupplied, while demand is low.
- In Vredenburg, 74 per cent of households need entry-level housing, but only 35 per cent of stock meets this demand. The R300 000 - R600 000 segment also has a demand-supply gap, with 2 089 households needing housing and only 1 059 properties available.
- In Saldanha, there's a need for 1 749 households in the R600 000 - R900 000 range, but only 572 properties are available.
- In Langebaan, a significant gap exists in the R600 000 - R900 000 range, with demand from 2 568 households but only 461 properties.
- The Saldanha HMS also confirmed that 12 per cent of the properties in Vredenburg, 13 per cent of Saldanha, 5 per cent of Langebaan, 10 per cent of St Helena Bay, 9 per cent of Hopefield, 1 per cent of Paternoster and 0.4 per cent of Jacobs Bay are in the high-end market (valued between R900 000 and R1.2 million), while 25 per cent of the properties in Vredenburg, 26 per cent of Saldanha, 84 per cent of Langebaan, 64 per cent of St Helena Bay, 7.6 per cent of Hopefield, 56 per cent of Paternoster and 99 per cent of Jacobs Bay are in the luxury market over R1.2 million.

From a housing demand perspective in Saldanha Bay Municipality:

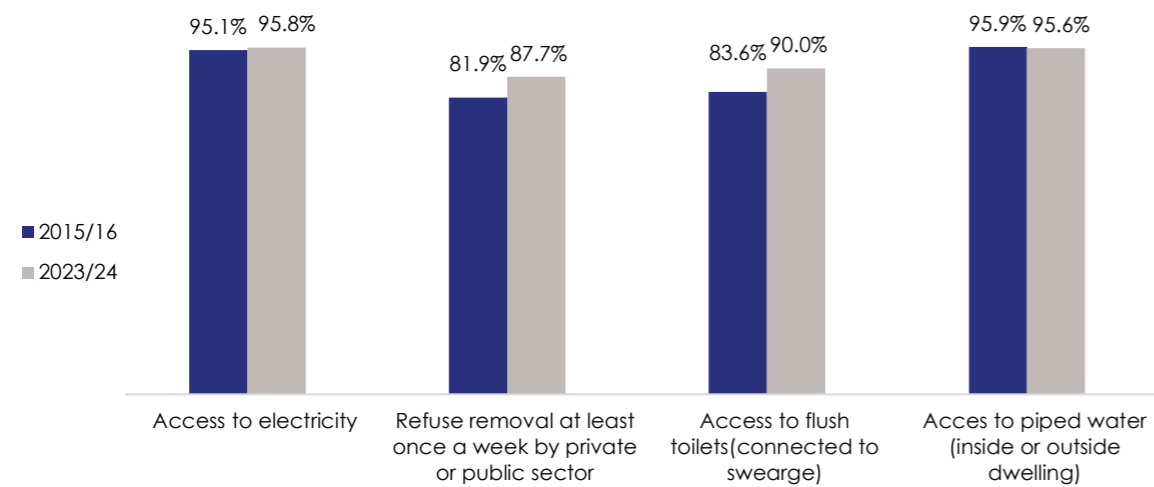
- 74 per cent of Vredenburg, 71 per cent of Saldanha, 14 per cent of Langebaan, 70 per cent of St Helena Bay, 78 per cent of Hopefield, 91 per cent of Paternoster and 0 per cent of Jacobs Bay households have a need for an entry level house (which is valued at R300 000 or less) whilst only 35 per cent of Vredenburg, 33.1 per cent of Saldanha, 2 per cent of Langebaan, 14.2 per cent of St Helena Bay, 28.9 per cent of Hopefield, 30 per cent of Paternoster and 0 per cent of Jacobs Bay households exist in this entry level segment.
- 15 per cent of Vredenburg, 9 per cent of Saldanha, 8 per cent of Langebaan, 8 per cent of St Helena Bay, 22 per cent of Hopefield, 0 per cent of Paternoster and 0 per cent of Jacobs Bay household have a need for the affordable housing segment of between R300 000 and R600 000, whilst 12 per cent of Vredenburg, 21 per cent of Saldanha, 4 per cent of Langebaan, 5 per cent of St Helena Bay, 15 per cent of Hopefield, 7 per cent of Paternoster and 0 per cent of Jacobs Bay households exist in this entry level segment.

ACCESS TO BASIC SERVICES

The WCD municipalities provides a range of basic services to ensure the well-being and quality of life of their residents. These services typically include: (i) access to clean and safe drinking water for all residents; provision of adequate sanitation services, including sewage systems and waste management; (iii) supply of reliable and affordable electricity, (iv) and (iv) disposing of household and commercial waste.

Municipalities in the WCD have improved access to basic services across the board, except for access to piped water, which slightly decreased from 95.9 per cent in 2015/16 to 95.6 per cent in 2023/24. Access to a flush toilet connected to a sewerage system recorded the largest improvement, from 83.6 per cent to 90 per cent. Refuse removal at least once per week recorded an increase of 5.8 percentage points. Access to electricity increased by 0.7 percentage points. The municipalities plan to improve the provision of basic services (which is under municipal/local governments) were hindered by floods, fuel price increases and limited energy supply during the 2023/24 financial year. This placed upward pressure on expenditure budgets and the roll-out of operations.

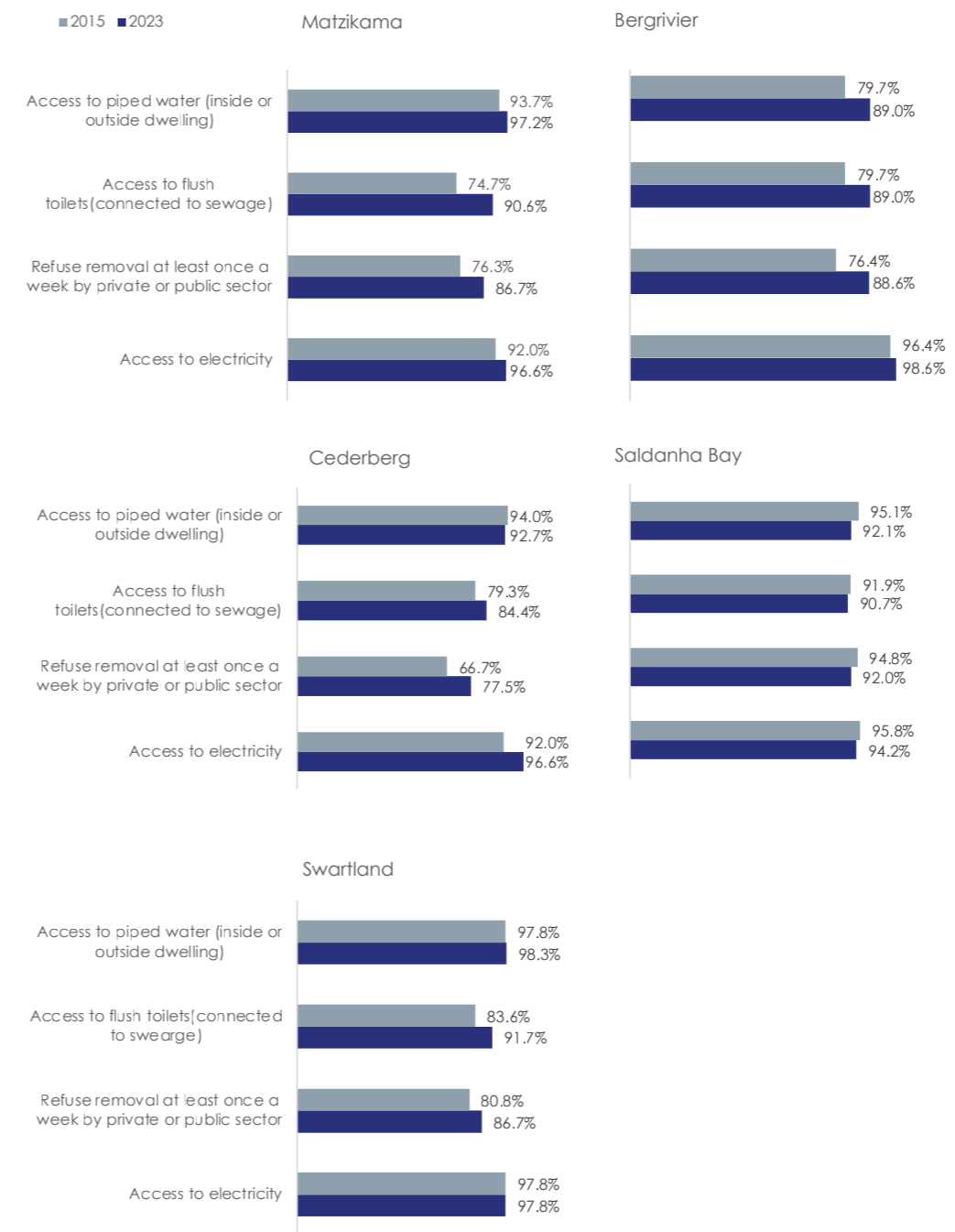
Figure 122
ACCESS TO BASIC SERVICES, West Coast District, 2015/16 - 2023/24



Source: Quantec, 2024.

The WCD has a large portion of formal housing, which allows for easier access to basic services. Most municipalities have seen an improvement in basic services from 2015 to 2023. Municipalities such as Matzikama, Cederberg, and Bergrivier have seen significant improvements in refuse removal as well as access to flush toilets. However, Saldanha Bay has seen a decrease of between 1 and 3 per cent in access to basic services, which could be due to the increase in population and the growth of informal settlements in the municipality.

Figure 123
ACCESS TO BASIC SERVICES, West Coast District, 2023



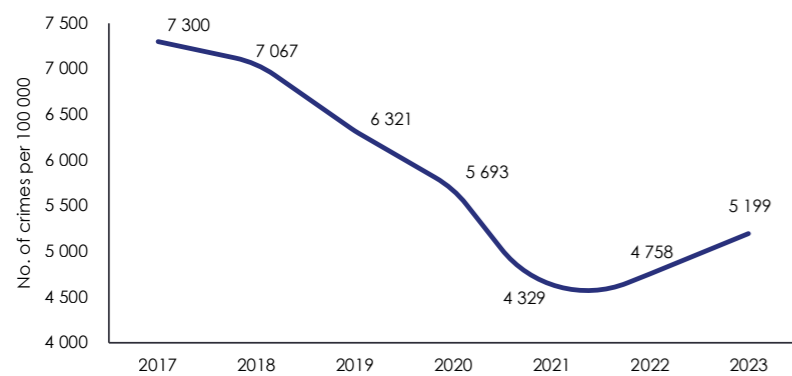
Source: Quantec, 2024.

CRIME

The WCG has invested in fighting against crime in the Province, through large-scale programmes like the Law Enforcement Advancement Plan (LEAP), which was introduced in Cape Town in 2020. LEAP officers are deployed to work with the South African Police Service (SAPS) and other law enforcement agencies.

The provincial law enforcement agencies have contributed towards a reduction in crime levels in the last decade. Between 2017 and 2021, the number of serious crimes per 100 000 people declined significantly from 7 300 to 5 199, representing a 28.8 per cent decrease. However, following this period, the number of serious crime incidents has shown an upward trend. This growth in crime has been exacerbated by the prevailing socio-economic conditions that leave a significant proportion of the adult population with limited access to employment opportunities, and therefore, income.

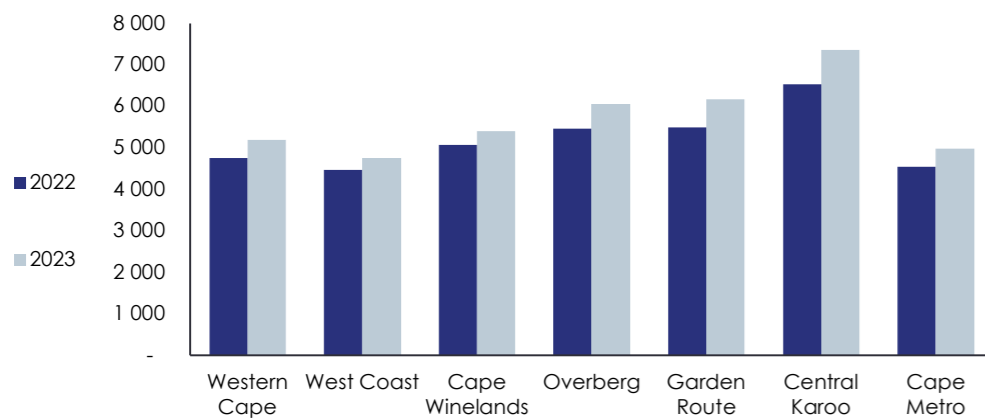
Figure 124
SERIOUS CRIMES PER 100 000 PEOPLE, Western Cape, 2017/18 – 2023/24



Source: Quantec, 2024

The increase in the number of serious crimes in 2023 is universal the Western Cape. CKD recorded the highest increase in crime rate, from 6 529 to 7 637 between 2022 and 2023. On the other hand, the lowest crime rate was recorded in the Cape Metro, reaching 4 980 by 2023/24. The crime levels in the WCD are amongst the lowest. Overall, the incidence of crimes across the districts is mostly explained by the socio-economic landscape.

Figure 125
SERIOUS CRIMES PER 100 000 PEOPLE, per district, 2022 – 2023



Source: Calculated from SAPS, Quantec and Western Cape DSD, 2023

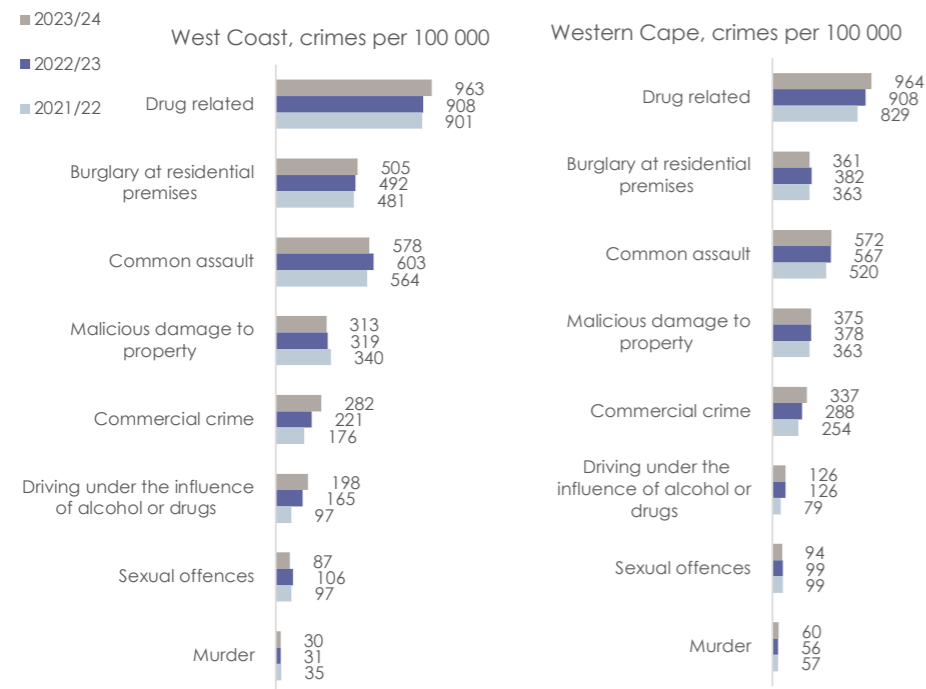
WCD is the fifth largest economy among the six districts of the WC, contributing approximately 4.9 per cent to the WC GDP. However, crime has been on an upward trend in the WCD. The highest increase in number of incidents per 100 000 was seen in driving under the influence of alcohol or drugs category, where there was a 19.5 per cent increase, i.e. an increase from 165 (2022/23) to 198 (2023/24) offences per 100 000. In recent years, commercial crime (including fraud) has been on the rise, with a 27.3 per cent increase for WCD and 16.8 per cent for WC. These more sophisticated crimes require businesses to be more vigilant, and for government to invest in precautionary measures to combat commercial crime.

Lastly, drug related offences went up by 6.4 per cent in WCD, while the Province recorded a 6.2 per cent increase. This crime category continued to have the highest number of offences per 100 000 people during the 2023/24 period. This illustrates the presence of socio-economic disparities influencing drug related crimes, and it calls for interventions from authorities to help with this scourge.



Burglary at residential premises went up to 505 per 100 000 from 492 in the previous period in WCD, and remains higher than the Province. Malicious damage to property showed a decline for both the District and the province, at 313 and 375 per 100 000 respectively. Similarly, sexual offences showed a 17.7 per cent decrease in WCD and a 5 per cent decrease in WC. This may indicate underreporting in this category of crimes, as many victims often hesitate to report incidents to authorities or the SAPS. Consequently, the recorded figures may not accurately reflect the true extent of these offences. Greater efforts in education and awareness campaigns are essential to empower GBV victims to come forward and seek support.

Figure 126
CRIMES PER 100 000 PEOPLE, West Coast District, 2021/22 – 2023/24



Source: Calculated from SAPS, Quantec and Western Cape DSD, 2023

GBV Prevalence: Insights from the Victim Empowerment Programme (VEP)

The socio-economic implications of GBV are profound. The immediate and long-term consequences not only affect the physical and psychological well-being of individuals but also disrupt family structures, reduce workplace productivity, and impose significant healthcare and legal costs. In alignment with the National Strategic Plan on GBV and Femicide, Western Cape Department of Social Development (DSD-WCG) recognized the need to assess the prevalence of GBV across the province. As a result, DSD-WCG initiated a geo-mapping project aimed at analysing psychosocial support client records from the Victim Empowerment Programme (VEP). This project involved collaboration with internal service delivery teams and non-governmental partners, focusing on utilizing service delivery data to inform evidence-based decisions.

The project enabled DSD-WCG to identify hotspots, monitor trends, and enhance the effectiveness of GBV interventions. The strategic use of service delivery data strengthens the provincial response to GBV and holds the potential to improve support services for victims within the Western Cape Province.

Figure 127
ACCESS TO GBV-RELATED SUPPORT SERVICES, West Coast District, 2023/24

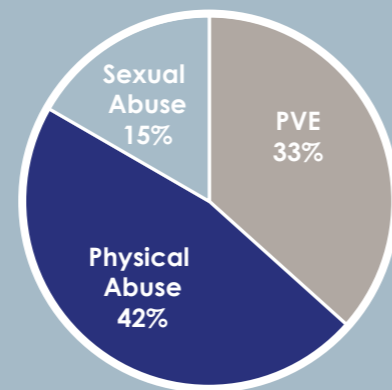


Source: Western Cape Department of Social Development, 2024

In the WCD during the 2023/24 financial year, 670 clients accessed GBV-related psychosocial support services provided by DSD-WCG and its NGO partners. Trends emerged across local municipal areas. Matzikama reported the highest number of clients, with 191, and a high concentration of cases in Vredendal North. Swartland followed with 173 clients, with Darling Town and Malmesbury Town identified as hotspot areas. Saldanha Bay recorded 116 clients, predominantly from Vredenburg and the surrounding farms across the municipality. Cederberg recorded 99 clients and a high concentration of cases in Clanwilliam, Citrusdal and Lamberts Bay. Bergrivier municipal area had the fewest clients with 91, with high client counts in Piketberg, Porterville and Eendekuil. The results reflect that the burden of GBV often falls disproportionately on vulnerable communities,

Analysis of abuse types in the WCD highlights the forms of GBV experienced by those accessing psychosocial support services. Physical abuse accounted for 42 per cent of reported cases, with psychological, verbal, and emotional abuse (PVE) accounting for 33 per cent and sexual abuse representing 15 per cent. A breakdown by municipal area reveals distinct trends. In Matzikama, Swartland and Saldanha Bay, Physical Abuse accounted for over 40 per cent and PVE accounted for over 30 per cent reported by clients. In Cederberg PVE accounted for 40 per cent and Physical for 32 per cent, whereas in Bergrivier municipality over half (54 per cent) of the clients reported physical abuse as the prevalent abuse type, with PVE at 25 per cent and Sexual Abuse at 18 per cent.

It is essential to recognise that GBV remains significantly underreported both globally and at the provincial level. This underreporting is driven by multiple factors, including limited access to services, social stigma, fear of retaliation, distrust in authorities, and cultural norms that deter victims from seeking assistance. To effectively address GBV, it is crucial to implement targeted interventions that enhance access to services, build trust in institutional responses, and shift societal attitudes towards gender-based violence



PHYSICAL VIOLENCE



SEXUAL VIOLENCE



EMOTIONAL & PSYCHOLOGICAL VIOLENCE



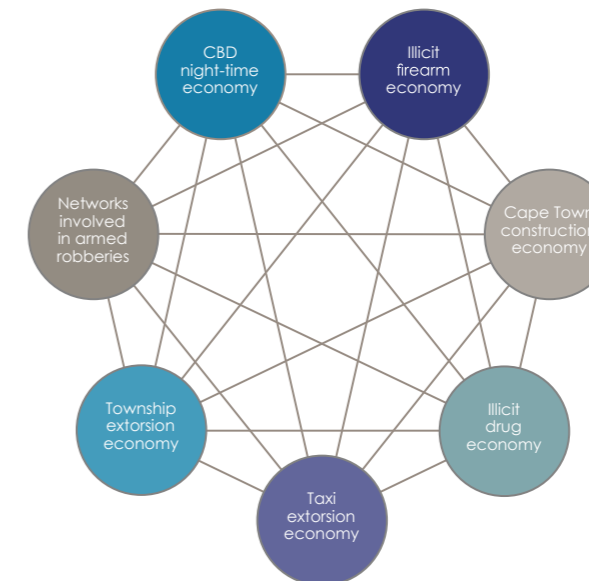
SOCIO-ECONOMIC VIOLENCE

GENDER-BASED VIOLENCE (GBV)

refers to harmful actions perpetrated against individuals based on their gender, predominantly affecting women and girls, although men and boys can also be victims. It manifests itself in various settings, such as domestic environments, workplaces, and public spaces, and is often driven by unequal power relations. GBV is entrenched in societal norms and encompasses a broad range of abuses, including psychological, verbal, and emotional abuse; physical abuse; sexual abuse; economic abuse; discriminatory abuse; harassment; domestic violence; and hate crimes.

While not explicitly stated in the crime statistics reported by the SAPS, violent crimes such as murder have been on the rise as a result of the increased presence and dominance of "extortion mafias". These so-called "mafias", seek to extort profits by bribing government officials and employing violence (murder and fires) has a detrimental impact socially and economically. The below infographic depicts the linkages between extortion and their illicit economies. Swift implementation of high-quality crime intelligence accompanied by expeditious prosecutions is required for the country to continue its infrastructure growth trajectory.

Figure 128
INTERSECTIONS BETWEEN EXTORTION AND OTHER ILLICIT ECONOMIES, 2024



Source: *The Shadow Economy - Uncovering Cape Town's Extortion Networks, 2024*

Challenges within the policing and judicial systems, such as corruption, lack of resources, and inefficiency, can hinder the effective prevention and prosecution of crime, allowing criminal activities to flourish.

CONCLUDING REMARKS

The insights gained from examining population dynamics, housing demand, essential services, household income, healthcare, education, and crime indicators are invaluable for addressing the needs of the WCD's residents and supporting sustainable development.

The WCD's population growth, driven by its appeal as a vibrant destination for residential, commercial, and tourist activities, underscores the need for strategic planning to accommodate this expansion. The District's population of 484 110 in 2023 is expected to grow at an average annual rate of 1.6 per cent from 2024 onwards. Swartland and Saldanha Bay, the largest municipalities, are projected to grow at an average rate of 2.0 per cent, highlighting their roles as key economic hubs.

Access to essential services remains a cornerstone of community wellbeing. While the WCD has made significant strides in improving access to basic services, challenges persist, particularly in areas with rapid urbanisation and informal settlements. The District has seen improvements in access to flush toilets (from 83.6 per cent to 90.0 per cent) and refuse removal (an increase of 5.8 percentage points) from 2015 to 2023. However, access to piped water slightly decreased from 95.9 per cent to 95.6 per cent.

Education plays a pivotal role in economic prosperity, and the WCD's focus on improving educational outcomes is commendable. The steady increase in learner enrolment and high retention rates indicate a robust education system. The District's learner-to-teacher ratio of 29.1 is well below the recommended 40:1 for primary schools and 35:1 for high schools. However, disparities in pass rates across municipalities highlight the need for targeted interventions to ensure equitable access to quality education. For instance, Saldanha Bay consistently achieves the highest pass rates in mathematics across all grades, while Matzikama has shown a decline in Grade 9 pass rates from 2021 to 2023.

Income and inequality metrics reveal a complex economic landscape. While the WCD has shown progress in reducing income inequality, with the Gini Index decreasing from 0.609 in 2020 to 0.582 in 2023, the persistent wage disparities and high levels of food insecurity underscore the importance of continued efforts to uplift disadvantaged communities. The District's GDP per capita stood at R58 028 in 2023, a slight decrease from the previous year's R59 227. The median income in the WCD varies significantly, with Saldanha Bay reporting the highest median income of R10 356 and Cederberg the lowest at R5 072.

Crime remains a significant concern, with recent increases in serious crimes and specific categories such as drug-related offences and commercial crime. The number of serious crimes per 100 000 people increased from 5 199 in 2021 to 7 637 in 2023. The socio-economic conditions contributing to crime highlight the need for comprehensive strategies that address the root causes and enhance law enforcement capabilities. The prevalence of GBV further underscores the urgent need for targeted interventions to support victims and prevent abuse. In 2023/24, 670 clients accessed GBV-related psychosocial support services in the WCD.

In conclusion, the WCD's path to sustainable development requires a multifaceted approach that balances economic growth with social equity. Strategic planning, investment in infrastructure, and targeted interventions are essential for addressing the diverse needs of the population. By fostering inclusive growth and ensuring access to essential services, education, and healthcare, the WCD can create a more equitable and prosperous future for all its residents.

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Infographic Indicator References

Indicator	Source	Year
Land area	Western Cape Government PPU, 2024. Provincial, District and local municipality population estimates by sex and age (2002 – 2037) based on Stats SA MYPE base year 2022	2024
Population density		
Households		
Gender		
Age		
Estimated population growth	Stats SA, Census 2022 Provinces at a glance	2024
Population	Nell, A. & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor)	2024
Average median income	Western Cape Department of Local Government	2024
Indigent households	Quantec, RHHF – Development Indicators – Households' facilities by population group at 2011 local municipal-/ward-based metro region level	2024
Access to services	Wesgro, Cape Town Visitor Trends: Jan – Dec 2022	2024
Tourism indicators	Quantec, RGVA – Income & Production – Regional Output and GVA at constant 2015 prices, Subsidies, and Taxes by industry and 211 local municipal-/ward-based metro region level	2024
Total GDPR Sectoral GDPR	Quantec, REMP – Labour – Employment and compensation by skill level, industry and 2011 local municipal-/ward-based metro region level	2024
Total employment Sectoral employment		

Infographic Indicator References

GDPR forecast	Quantec, RVGA – Income & Production – Regional Output and GVA at basic prices by industry and 211 local municipal-/ward-based metro region level Internal model forecasting methodology.	2024
GDPR per capita	Quantec, RVGA – Income & Production – Regional Output and GVA at constant 2015 prices, Subsidies, and Taxes by industry and 211 local municipal-/ward-based metro region level Western Cape Government PPU, 2024. Provincial, District and local municipality population estimates by sex and age (2002 – 2037) based on Stats SA MYPE, 2024	2024
Unemployment rate	Quantec, RUEM – Labour – Employment and unemployment by 2011 municipal-/ward-based metro region level	2024
International trade indicators	Quantec, TRD12 – RSA Regional Trade QSIC Quantec, TRD11 – RSA Regional Trade HST 4-digit	2024

Section C Infographic Indicator References

Indicator	Source	Year
Households	Western Cape Government PPU, 2023. Provincial, District and local municipality population estimates by sex and age (2002 – 2037) based on Stats SA MYPE 2021 and MYPE 2024	2024
Gender		
Age		
Estimated population growth	Stats SA, MYPE 2024	2024
Population	Nell, A. & Visagie, J. Spatial Tax Panel 2014 – 2023 (dataset). Version 3. National Treasury Cities Support Programme and Human Sciences Research Council (producer and distributor)	2024
Average median income	Western Cape Department of Local Government	2024
Indigent households	Quantec, RPOP– Population, Number of Households and Densities by population group at 2011 local municipal-/ward-based metro region level	2024
Race		



Provincial Treasury
Private Bag X9165
7 Wale Street
Cape Town
tel: +27 21 483 5618
www.westerncape.gov.za

Email: pt.communications@westerncape.gov.za

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