

Executive Summary

This destination sector fact sheet provides key trade- and investment-related statistics for the Cape Winelands district municipality. Specifically, it provides details about the district's area, population, and employment; and trends relating to global trade, investments and tourism. The key highlights are provided below:

Economy

- The Cape Wineland's economy grew by 0.26% y-o-y in 2024, slower than 2024's growth rate of 1.65% y-o-y. The gross value added (GVA) for the region reached ZAR67.91bn in 2024, up from ZAR67.73bn recorded in 2023.
- The Drakenstein local municipality was the largest contributor to the district's output in 2024, accounting for 32.62% of the total regional gross valued added (RGVA). The municipalities of Stellenbosch and Breede Valley placed second and third, accounting for 24.08% and 19.40% of GVA respectively.
- Looking at the GVA in different sectors, the finance, insurance, real estate, and business services sector was the largest contributory sector to the district's GVA in 2024, accounting for 28.49% of the total output. The wholesale and retail trade, catering and accommodation sector (with a share of 14.89%); and the manufacturing sector (14.03%) made the second and third largest contributions.
- The total number of employed persons in the district stood at 391,787 in 2024, representing a decline of -0.78% y-o-y, from 394,878 people who were employed in 2023.
- The top-employing sector in 2023 was the wholesale and retail trade, catering and accommodation sector, with 87,770 people employed in this sector. This was followed by the agriculture, forestry and fishing sector (83,501 people) and then by the community, social and personal services sector (69,737 people).

Trade

- Exports from the Cape Winelands reached ZAR49.79bn in 2024, decreasing by -0.93% y-o-y from ZAR50.26bn earned in 2023. Imports in turn grew by 5.74% y-o-y to a cost of ZAR14.35bn in 2024, up from ZAR13.57bn incurred in 2023.
- The Netherlands was the top destination market for the district's exports in 2024 which were valued at ZAR9.29bn. The United Kingdom, which received exports valued at ZAR7.06bn, and China, with exports of ZAR2.94bn, ranked second and third.
- China was the district's top import source market in 2024, having imported goods at a cost of ZAR2.66bn. The Netherlands followed with imports valued at ZAR1.00bn, and Germany with imports that cost ZAR965.69m.
- With regard to products, citrus fruit was the district's top export product category in 2024, having earned ZAR9.41bn in that year. Maize (corn) was the district's top import product in 2024, at a cost of ZAR1.31bn.

Foreign Direct Investment

- According to Foreign Direct Investment (FDI) Intelligence, the Cape Winelands district attracted 16 FDI projects valued at ZAR8.03bn from January 2015 to September 2025.

Tourism

- Based on the findings of the 2024 Annual Wesgro Regional Tracking Survey, 84.83% of visitors to the Cape Winelands were domestic visitors, primarily from the Western Cape (72.49%). Overseas visitors accounted for 15.17% of tourists, with the United States (27.02%), the United Kingdom (20.81%), and Germany (18.94%) as the leading source markets for the region.
- Most of the visitors (18.42%) travelled to the region primarily for leisure/holiday. Some 1.22% of visitors were in the region for education while others (0.75%) travelled for events or festivals.
- The most popular activities among tourists included culture and heritage experiences (with 6.31% of visitors participating in these), scenic drives (4.19%) and wine tasting (3.72%).

Cape Town and the Western Cape – A Leading Regional Economy

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1. Area

The Cape Winelands district is situated next to the Cape Metropolitan area and is landlocked by the neighbouring West Coast and Overberg regions, as seen in Figure 1. The Cape Winelands district covers an area 21,472.7 km² which constitutes 17% of the Western Cape's total area. It is the second most-populated area in the Western Cape, with an estimated population of 994,332 people in 2024.

Figure 1: District municipalities in the Western Cape



The district has five local municipalities, namely the Stellenbosch, Drakenstein, Witzenberg, Breede Valley and Langeberg municipalities (see Figure 2). Major towns include Ceres, Franschhoek, Paarl, Robertson, Stellenbosch, and Worcester.

In terms of economic activity, the region has an extensive agricultural industry that is mostly rural. Witzenberg is known for its apple and pear orchards, while Langeberg is the heart of the fruit canning industry. Drakenstein, home to the bustling node of Paarl, boasts a diverse economy encompassing agro-processing and business services. Stellenbosch is surrounded by lush vineyards and internationally acclaimed wineries. This town hosts numerous finance and tech head offices as well as Stellenbosch University which attracts students from across South Africa and abroad. Lastly, Breede Valley, well known for its winemaking capabilities and table grape exports, completes the Cape Winelands district.

Figure 2: Municipalities that make up the Cape Winelands district



2. General Information

Table 1 shows the key indicators for the Cape Winelands district.

Table 1: Key indicators, Cape Winelands

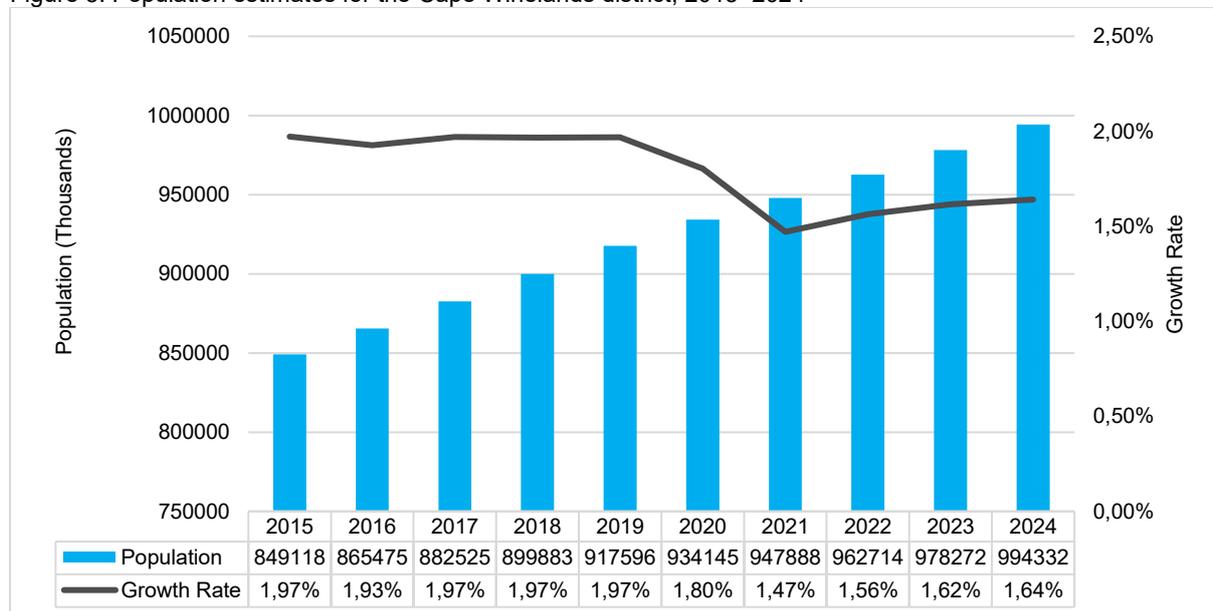
INDICATOR	
Executive Mayor	Ald (Dr) Elna von Schlicht
Area size	21 473.40 km ² (16.59% of WC)
Population (2024) (estimates)	994,332 (13.41% of WC)
Population racial groups (2024) (estimates)	Coloured (61.79%), Black African (28.49%), White (9.34%) & Indian or Asian (0.38%)
Real RGVA (2024)	ZAR67.91bn (11.30% of WC)
Real RGVA growth (2024)	0.26%
Unemployment rate (2024) (average)	13.21%
Gini Coefficient - current income per capita (2024)	0.56
Functional literacy rate ¹ (2024)	63.87%
Human Development Index (2024)	0.76

Source: Cape Winelands District Municipality, 2025; Quantec, 2025; Stats SA, 2025

2.1. Demographics

The population estimates and population growth rate for the Cape Winelands district in 2015–2024 are illustrated in Figure 3. In 2024, the district's population was estimated at 994,332 people, making the region the second most-populated district municipality in the Western Cape after the City of Cape Town. The district accounted for 13.41% of the Western Cape's population in 2024 and its population is estimated to have grown by an annual average rate of 1.79% over the specified 10-year period.

Figure 3: Population estimates for the Cape Winelands district, 2015–2024



Source: Quantec, 2025. Author own calculations based on Quantec data.

Table 2 shows the demographic breakdown of the population groups in the Cape Winelands. In 2024, the Coloured population represented the largest group, accounting for 61.79% of the total population, followed by Black Africans (28.49%) and Whites (9.34%).

¹ The Functional Literacy Rate of the population is the percentage of persons aged 20 years and above with the highest level of education grade 7 and higher.

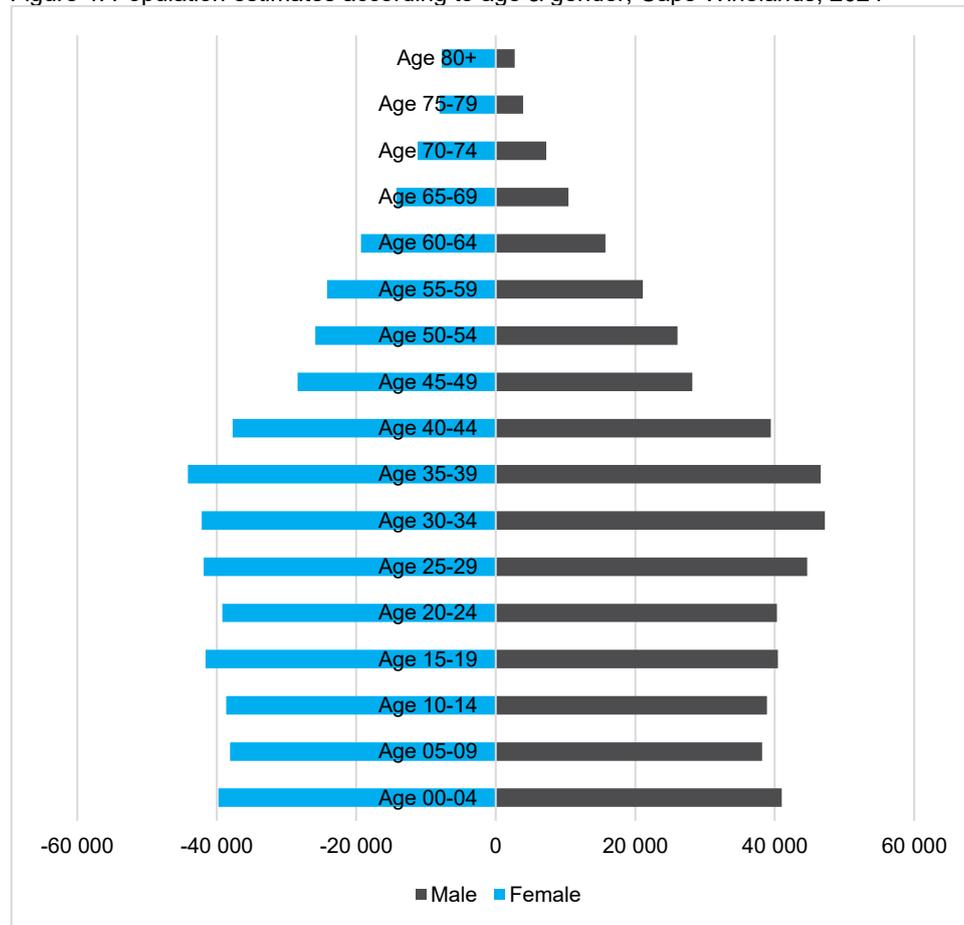
Table 2: Population breakdown according to groups, Cape Winelands, 2023–2024

GROUP	2023	2024	% SHARE, 2024	% CHANGE, 2023-2024
Coloured	604 508	614 367	61.79%	1.63%
Black African	277 984	283 296	28.49%	1.91%
White	92 074	92 881	9.34%	0.88%
Asian/Indian	3 706	3 788	0.38%	2.21%
TOTAL	978 272	994 332	100.00%	1.64%

Source: Quantec, 2025. Author own calculations based on Quantec data.

The graph in Figure 4 illustrates the population of the Cape Winelands district according to gender and age in 2024. The data shows that most of the population is young and that the size of the cohorts tends to decrease the older the age group becomes.

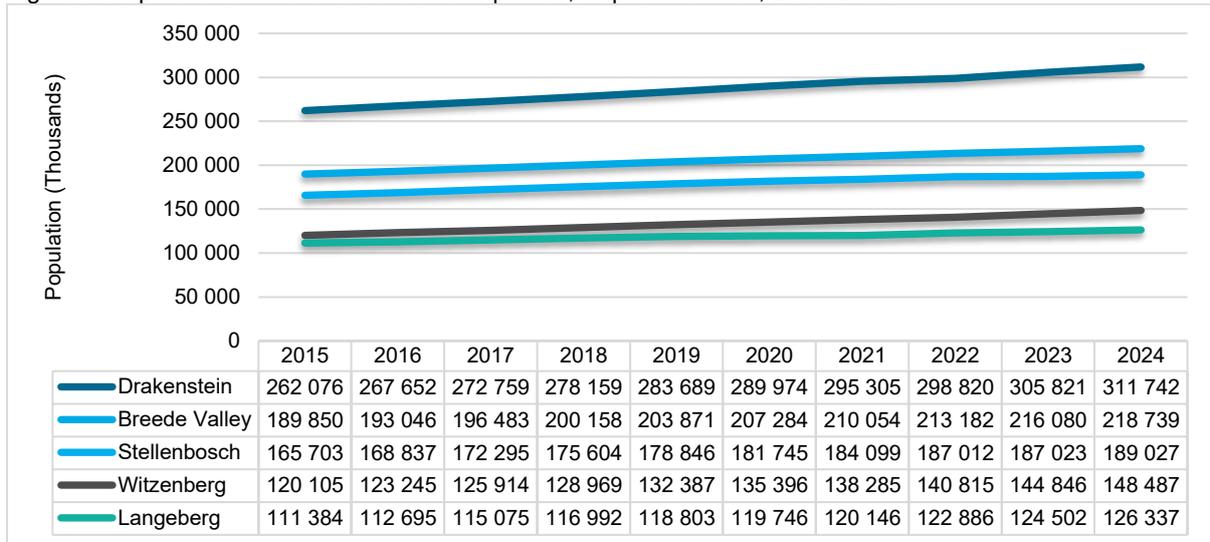
Figure 4: Population estimates according to age & gender, Cape Winelands, 2024



Source: Quantec, 2025. Author own calculations based on Quantec data.

The population figures for each local municipality in the Cape Winelands district for the period 2015 to 2024 are illustrated in Figure 5. The Drakenstein and Breede Valley municipalities rank as the two most-populated local municipalities.

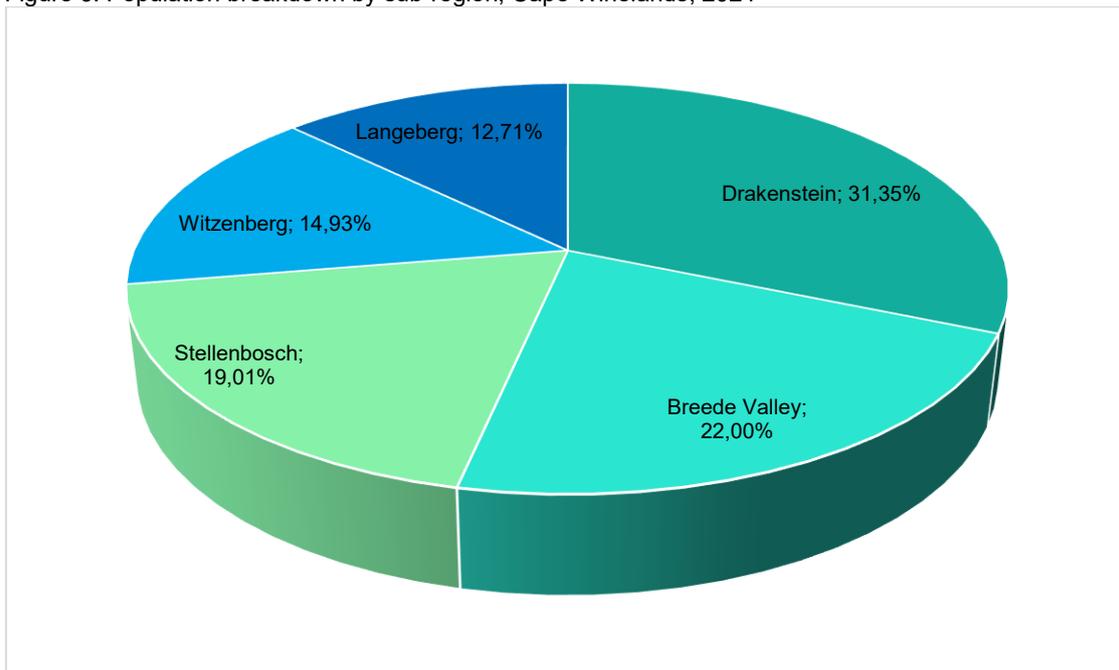
Figure 5: Population estimates of local municipalities, Cape Winelands, 2015–2024



Source: Quantec, 2025. Author own calculations based on Quantec data.

Figure 6 shows the sub-regional breakdown of the population in the Cape Winelands district in 2024. The largest proportion of the population (31.35%) lives in the Drakenstein municipality, followed by those living in Breede Valley (22.00%) and in Stellenbosch (19.01%).

Figure 6: Population breakdown by sub-region, Cape Winelands, 2024

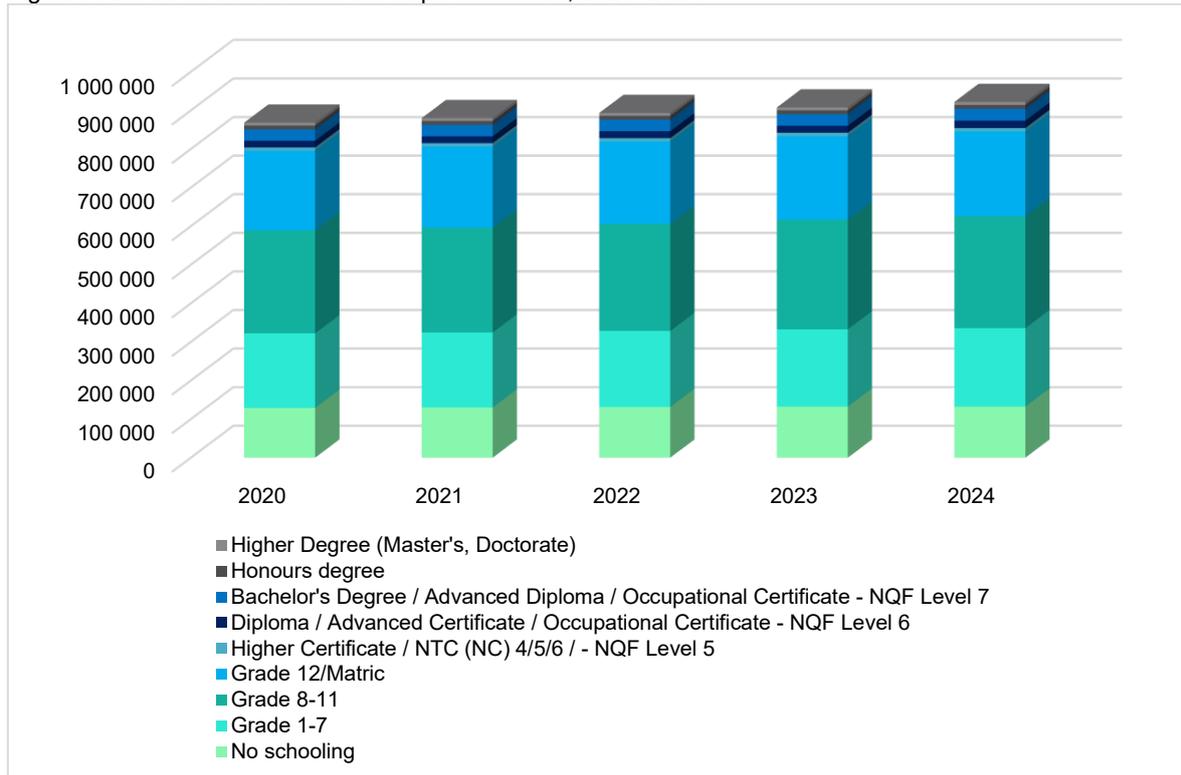


Source: Quantec, 2025. Author own calculations based on Quantec data.

2.2. Education

Figure 7 presents the levels of education held by those living in the Cape Winelands district. The data indicates that approximately 22.09% of the people living in the Cape Winelands district attained a matric (Grade 12) qualification in 2024. Some 13.33% of the population had no schooling in 2024, and those with bachelor's, master's and higher education degrees constituted only 4.90% of the population.

Figure 7: Levels of education in the Cape Winelands, 2020–2024



Source: Quantec, 2025. Author own calculations based on Quantec data. Note: Data is from the REDU—Persons' level of education by gender, population group and age group at 2016 local municipality/ward-based metro region level

2.3. Employment

Table 3 provides a snapshot of employment figures in the Cape Winelands district in 2024. The unemployment rate in the district stood at 13.21% in 2024, with 391,787 people employed from a working-age population of 694,205 people.

Table 3: Estimates for employment indicators, Cape Winelands, 2024

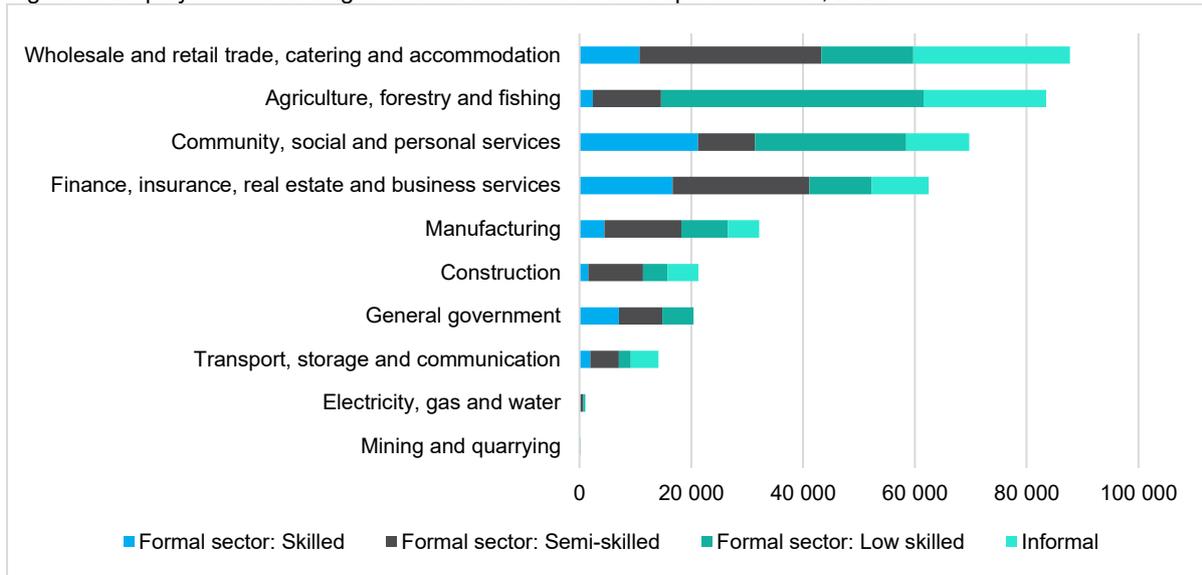
INDICATOR	
Population (2024 estimates)	994,332
Working-age population (15-64 years)	694,205
Labour force (economically active)	451,435
Not economically active	242,770
Labour force participation rate (%)	65.03%
Employed	391,787
Labour absorption rate (%)	56.44%
Unemployed	59,648
Unemployment rate, official (%) average	13.21%

Source: Quantec, 2025

The wholesale and retail trade, catering and accommodation sector was the largest employing sector in the district in 2023, with 87,770 people employed in this sector. This was followed by the agriculture, forestry and fishing sector, which employed a total of 83,501 people. The community, social and personal services sector was in third place, having employed 69,737 people.

Looking at the number of people employed in different sectors in 2024 in relation to their skill levels, the community, social and personal services sector employed the largest number of highly skilled people (21,201), as shown in Figure 8. Most of the semi-skilled (32,502) and informal workers (28,054) were employed in the wholesale and retail trade, catering and accommodation sector. The agriculture, forestry and fishing sector was responsible for employing most of the low-skilled workers (46,921).

Figure 8: Employment according to sectors and skills in the Cape Winelands, 2024

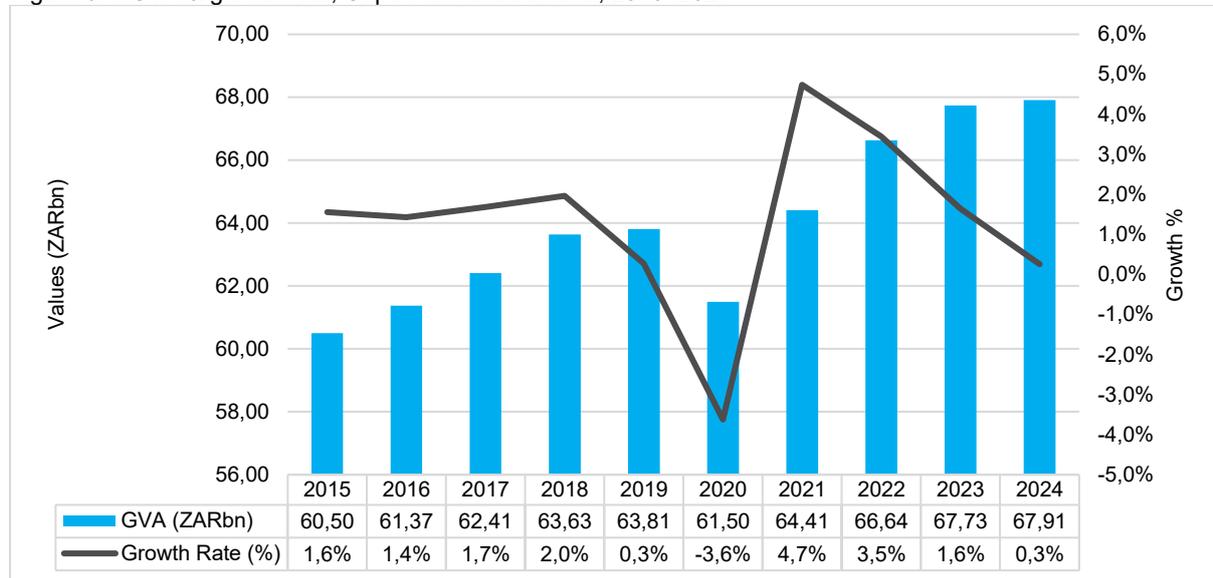


Source: Quantec, 2025. Author own calculations based on Quantec data.

3. Economic Overview

The Cape Wineland's economy grew by 0.26% y-o-y in 2024, slower than 2024's growth rate of 1.65% y-o-y. The GVA for the region reached ZAR67.91bn, slightly more than the value of ZAR67.73bn in 2023. Over the past 10 years, 2015 to 2024, the economy grew by 12.24% overall from a value of ZAR60.50bn in 2015 to ZAR67.91bn in 2024. On average, output grew at an average annual growth rate of 1.34% from 2015 to 2024.

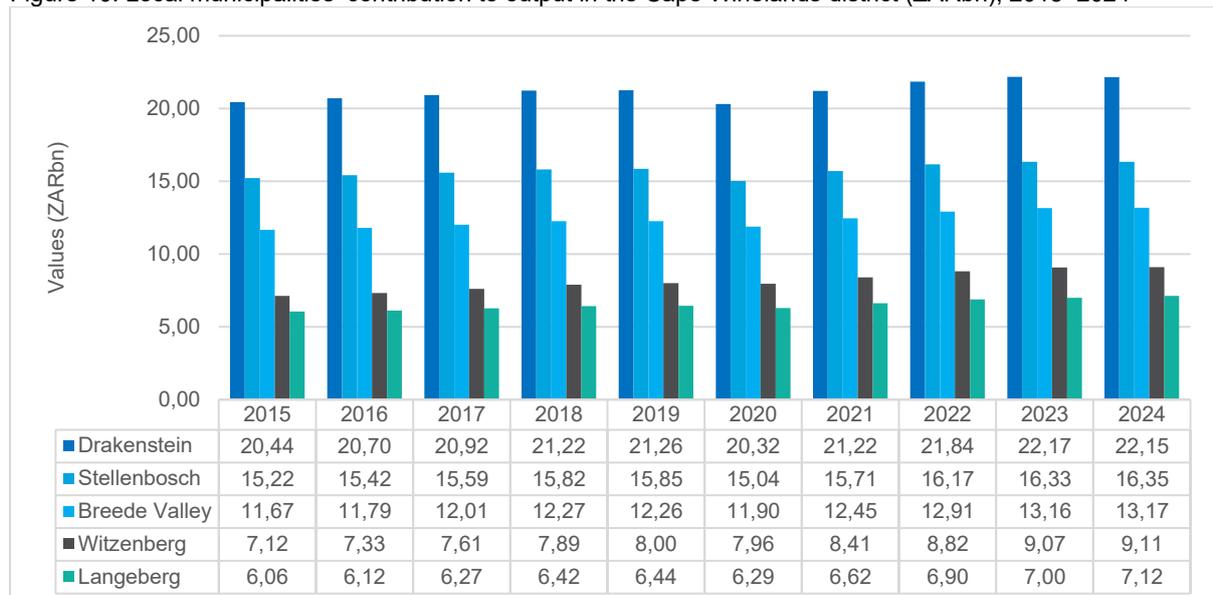
Figure 9: RGVA & growth rate, Cape Winelands district, 2015–2024



Source: Quantec, 2025. Author own calculations based on Quantec data. Note: Concept: GVA at basic prices. Unit: ZAR, constant 2015 prices.

Figure 10 shows the contributory share of local municipalities to the Cape Winelands' output in 2015–2024. Historically, the Drakenstein municipality has always been the largest contributor to GVA in the Cape Winelands district, as was the case in 2024. In that year, the Drakenstein municipality contributed ZAR22.15bn to the district's economic output, equivalent to 32.62% of the total RGVA. Stellenbosch (with a share of 24.08%) and Breede Valley (with a share of 19.40%) were the second and third largest contributors to the district's GVA in 2024.

Figure 10: Local municipalities' contribution to output in the Cape Winelands district (ZARbn), 2015–2024



Source: Quantec, 2025. Author own calculations based on Quantec data. Note: Concept: GVA at basic prices. Unit: ZAR, constant 2015 prices.

The finance, insurance, real estate, and business services sector was the largest contributor to the Cape Winelands' GVA in 2023, accounting for 28.49% of the total GVA. It was followed by the wholesale and retail trade,

catering, and accommodation sector (with a share of 14.89%), and the manufacturing sector (14.03%). This is illustrated in Table 4.

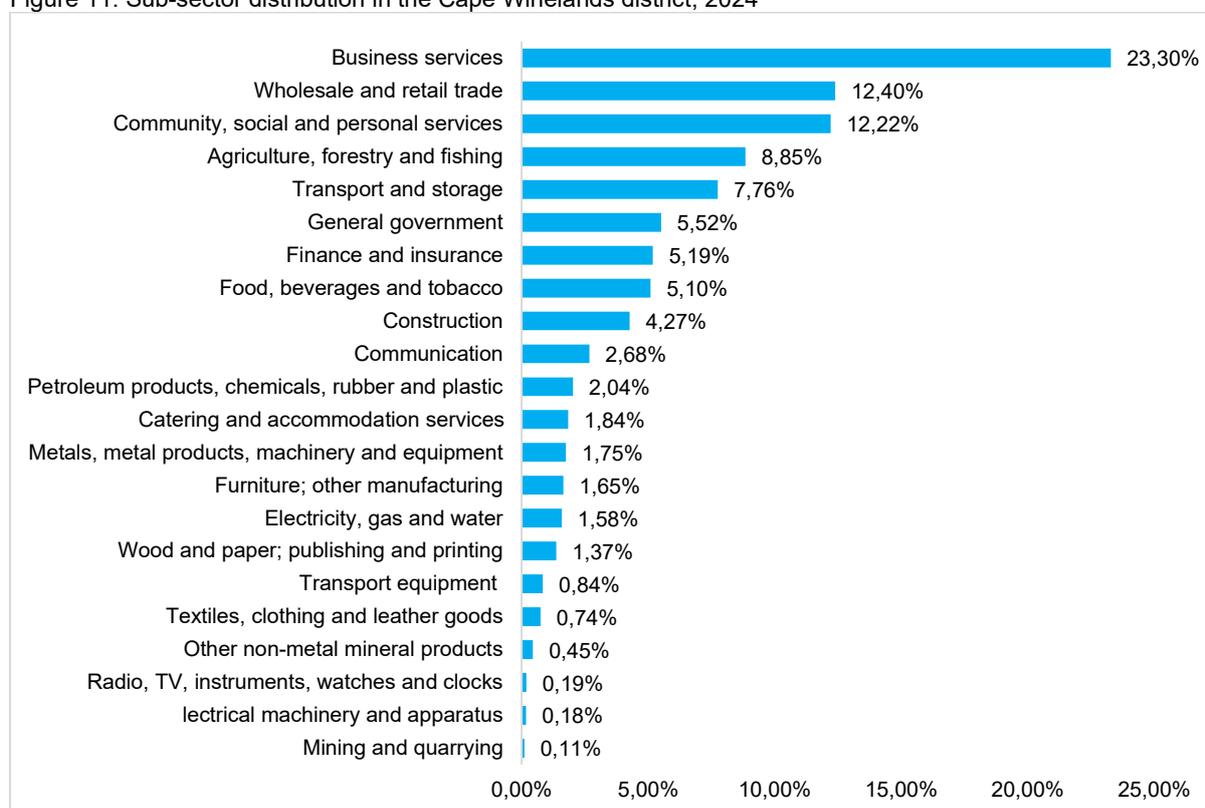
Table 4: Sector breakdown of RGVA, Cape Winelands, 2015–2024

SECTOR	VALUE 2020 (ZARbn)	VALUE 2021 (ZARbn)	VALUE 2022 (ZARbn)	VALUE 2023 (ZARbn)	VALUE 2024 (ZARbn)	% SHARE 2024	% CHANGE, 2023-2024
Finance, insurance, real estate and business services	16.49	17.27	18.12	18.59	19.35	28.49%	4.09%
Wholesale and retail trade, catering and accommodation	9.02	9.55	10.05	10.13	10.11	14.89%	-0.19%
Manufacturing	9.03	9.90	9.76	9.75	9.53	14.03%	-2.29%
Community, social and personal services	7.42	7.61	7.74	7.94	8.42	12.40%	5.98%
Agriculture, forestry and fishing	4.91	5.23	5.91	6.59	6.65	9.80%	1.01%
Transport, storage and communication	6.69	6.93	7.18	6.82	6.01	8.85%	-11.94%
General government	3.76	3.71	3.73	3.74	3.75	5.52%	0.13%
Construction	3.04	3.02	2.99	3.04	2.90	4.27%	-4.44%
Electricity, gas and water	1.06	1.10	1.09	1.06	1.12	1.65%	5.71%
Mining and quarrying	0.07	0.08	0.07	0.07	0.07	0.11%	-0.05%
Total	61.50	64.41	66.64	67.73	67.91	100.00%	0.3%

Source: Quantec, 2025. Author own calculations based on Quantec data.

Turning to contributions from sub-sectors to GVA, Figure 11 illustrates that business services was the largest contributor in 2024. At a value of ZAR15.82bn, this was equivalent to 23.30% of output. This was followed by the wholesale and retail trade sector with contributions valued at ZAR8.42bn (12.40%), and then by community, social and personal services at ZAR8.30bn (12.22%).

Figure 11: Sub-sector distribution in the Cape Winelands district, 2024

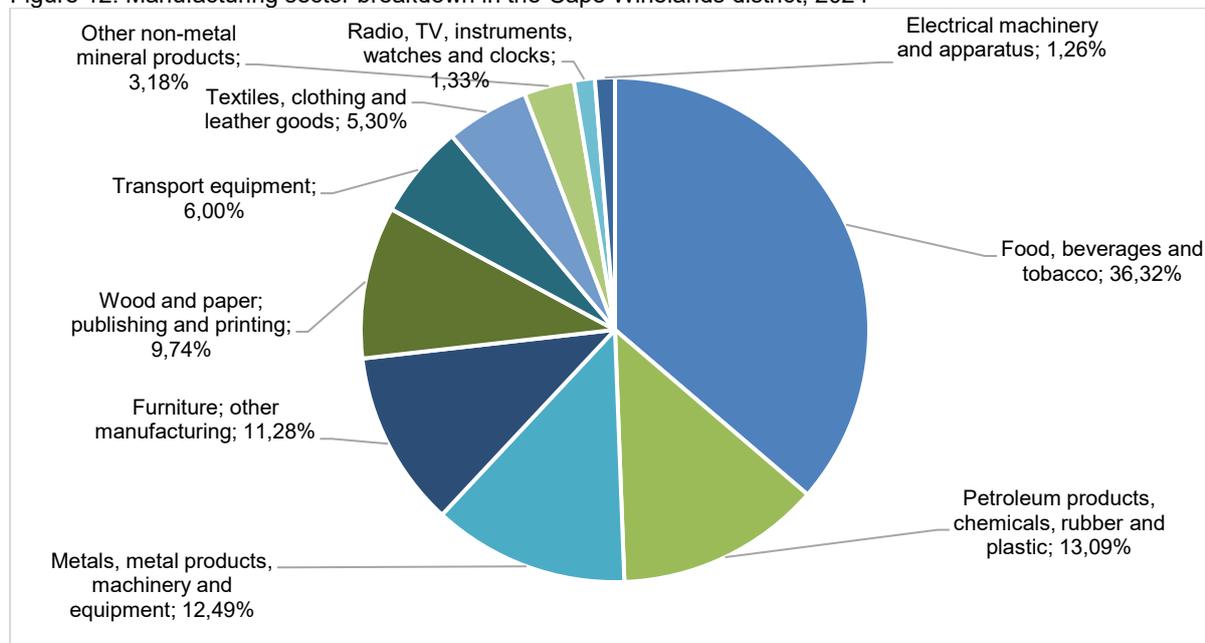


Source: Quantec, 2025. Author own calculations based on Quantec data. Note: Concept: GVA at basic prices. Unit: ZAR, constant 2015 prices.

Figure 12 illustrates contributions from sub-sectors to the Cape Winelands' manufacturing output in 2024. The top sub-sectors were:

- The food, beverages and tobacco sub-sector which, at a value of ZAR3.46bn, was equivalent to a 36.32% share of manufacturing output
- The petroleum products, chemicals, rubber and plastic sub-sector valued at ZAR1.25bn (representing a 13.09% share)
- The metals, metal products, machinery and equipment sector with a contribution of ZAR1.19bn (representing a 12.49% share).

Figure 12: Manufacturing sector breakdown in the Cape Winelands district, 2024

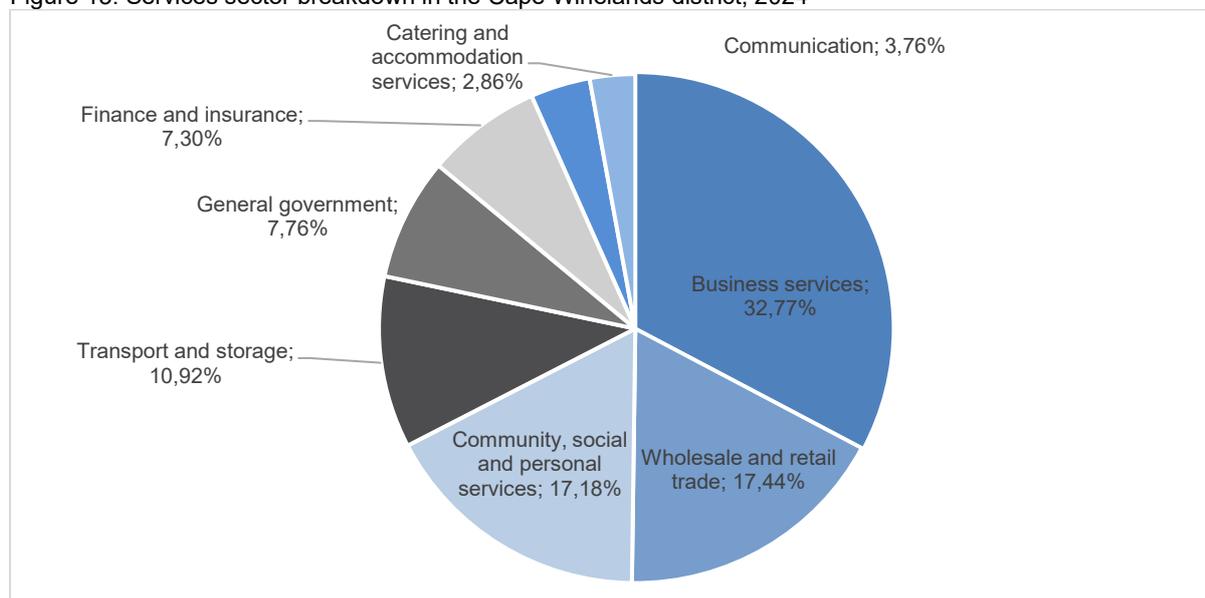


Source: Quantec, 2025. Author's own calculations based on Quantec data. Note: Concept: GVA at basic prices. Unit: ZAR, constant 2015 prices.

Figure 13 gives the breakdown of the output from the services sector in the Cape Winelands district in 2024. The top sub-sectors were:

- Business services at a value of ZAR15.82bn, which was equivalent to 32.77% of the total output
- Wholesale and retail trade at a value of ZAR8.42bn (equivalent to a 17.44% share)
- Community, social and personal services at ZAR8.30bn (equivalent to a 17.18% share)

Figure 13: Services sector breakdown in the Cape Winelands district, 2024

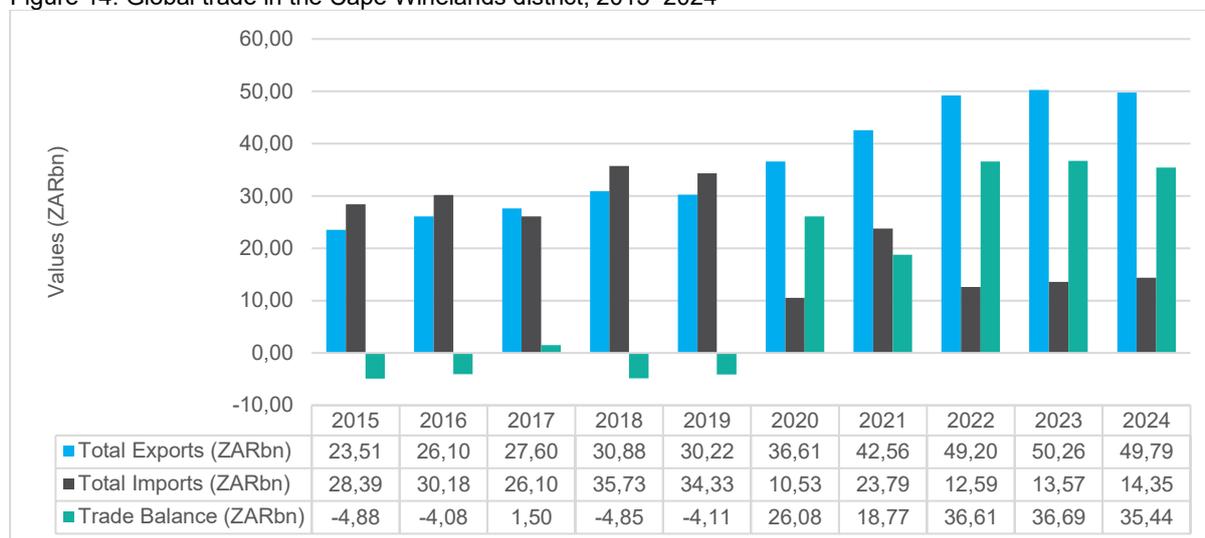


Source: Quantec, 2025. Author own calculations based on Quantec data. Note: Concept: GVA at basic prices. Unit: ZAR, constant 2015 prices

4. International Trade

The Cape Winelands district's global trade from 2015 to 2024 is shown in Figure 14. In 2024, the district exported goods to the value of ZAR49.79bn, 0.93% lower than 2023's value of ZAR50.26bn. In turn, imports were valued at ZAR14.35bn in 2024, marking a 5.74% y-o-y increase, from the value of ZAR13.57bn incurred in 2023. On average, exports increased at an average annual growth rate of 8.94% and imports at a rate of 1.42% over the past 10 years (2015–2024).

Figure 14: Global trade in the Cape Winelands district, 2015–2024



Source: Quantec, 2025. Author own calculations based on Quantec data. Note: Values are in SA Rand (ZAR, current prices)²

Table 5 lists the top ten destination markets for exports from the Cape Winelands district in 2024. The Netherlands was the largest export market for the district in 2024, accounting for 18.67% of total exports at a value of ZAR9.29bn. Top exports to the Netherlands from the district in 2024 were grapes; citrus fruit; and apricots, apples and other fruit. The United Kingdom (with a share of 14.19% of the export market) and China (5.91%) were the second and third largest export markets respectively.

Of the top 10 markets, the fastest-growing markets for the district's exports over the past five years, as measured by the highest average growth rate, were Germany (with a 34.88% growth rate), the United States (22.01%) and China (19.81%).

Table 5: Cape Winelands top 10 export destinations, 2024

RANK	COUNTRY	VALUE 2024 (ZARbn)	% SHARE, 2024	% AVE GROWTH, 2020-2024
1	Netherlands	9.29	18.67%	14.77%
2	United Kingdom	7.06	14.19%	9.69%
3	China	2.94	5.91%	19.81%
4	United States	2.69	5.39%	22.01%
5	United Arab Emirates	2.02	4.06%	12.61%
6	Botswana	1.99	4.00%	15.07%
7	Namibia	1.44	2.89%	-1.71%
8	Russian Federation	1.32	2.65%	-1.50%
9	Japan	1.26	2.52%	8.80%
10	Germany	1.09	2.19%	34.88%
TOTAL EXPORTS		49.79	100.00%	10.84%

Source: Quantec, 2025. Author own calculations based on Quantec data. Note: Values are in SA Rand (ZAR, current price)

² All trade data in this document are in values (South African rand, nominal terms), unless otherwise stated.

Table 6 gives details of the top import source markets for the Cape Winelands district in 2024. China was the district's top import source market in 2024, accounting for an 18.56% share of total imports at a value of ZAR2,662.75m (or ZAR2.66bn). Top imports from China into the district in 2023 were calculating machines and pocket-size data recording; fruit juices (including grape must); and vegetable juices and oxygen-function amino-compounds. The Netherlands (with a share of 6.97% of imports) and Germany (6.73%) placed second and third respectively.

Of the top 10 markets, the fastest-growing markets for the district's imports over the past five years, as measured by the highest average growth rate, were the Russian Federation (with an average growth rate of 1339.28%), followed by the Argentina (386.20%) and Brazil (40.58%).

Table 6: Cape Winelands' top 10 import source markets, 2024

RANK	COUNTRY	VALUE 2024 (ZARm)	% SHARE, 2024	% AVE GROWTH, 2020-2024
1	China	2662.75	18.56%	19.02%
2	Netherlands	999.80	6.97%	31.18%
3	Germany	965.69	6.73%	7.50%
4	Argentina	952.94	6.64%	386.20%
5	Italy	807.41	5.63%	7.09%
6	Spain	766.72	5.34%	10.86%
7	France	710.32	4.95%	5.79%
8	Russian Federation	678.02	4.73%	1339.28%
9	United States	672.19	4.69%	12.23%
10	Brazil	612.24	4.27%	40.58%
TOTAL IMPORTS		14347.22	100.00%	4.61%

Source: Quantec, 2025. Author own calculations based on Quantec data. Note: Values are in SA Rand (ZAR, current price)

The top ten exported products from the Cape Winelands in 2024 are listed in Table 7. Citrus fruit was the district's top export category in the year, at a value of ZAR9.41bn and equivalent to 18.91% of total exports. Grapes (at a value of ZAR7.03bn) and wine (ZAR6.68bn) followed in second and third place respectively. Combined, the top 10 export products accounted for 79.20% of total exports in 2024.

Among the top 10 export products, the fastest-growing categories over the past five years, as measured by the highest average growth rate were dates, figs, pineapples, avocados, guavas, mangoes and mangosteens (28.78%); dried fruit (24.21%) and apples, pears and quinces (18.64%).

Table 7: Cape Winelands' top 10 exports, 2024

RANK	PRODUCT	VALUE (ZARbn), 2024	% SHARE, 2024	AVE GROWTH %, 2020-2024
1	Citrus fruit	9.41	18.91%	14.26%
2	Grapes	7.03	14.12%	16.30%
3	Wine	6.68	13.41%	0.59%
4	Apples, pears and quinces	6.09	12.24%	18.64%
5	Other fruit	2.99	6.00%	13.71%
6	Apricots, cherries, peaches (including nectarines), plums and sloes	2.40	4.81%	18.53%
7	Fruit, nuts and other edible parts of plants	1.48	2.98%	9.76%
8	Fruit juices (including grape must) and vegetable juices	1.32	2.65%	18.29%
9	Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens	1.17	2.35%	28.78%
10	Fruit, dried	0.86	1.73%	24.21%
TOTAL EXPORTS		49.79	100.00%	10.84%

Source: Quantec, 2025. Author own calculations based on Quantec data. Note: Values are in ZAR, current prices

Maize (corn) was the Cape Winelands' top import product in 2024, accounting for 9.14% of the district's total import costs, at a cost of ZAR1,311.26m as shown in Table 8. This was followed by wheat and meslin at a cost of ZAR673.45m; and fruit juices (including grape must) at a cost of ZAR565.24m, in second and third place respectively. Combined, the top 10 import products accounted for 32.86% of total imports in 2024.

Among the top 10 import products, the fastest-growing categories over the past five years, as measured by the highest average growth rate were calculating machines and pocket-size data recording (with a growth rate of 1147.18%); paper, paperboard, cellulose wadding and webs of cellulose fibres, coated, impregnated (69.28%); and petroleum oils, other than crude (62.11%).

Table 8: Cape Winelands' top 10 imports, 2024

RANK	PRODUCT	VALUE (ZARm), 2024	% SHARE, 2024	AVE GROWTH %, 2020-2024
1	Maize (corn)	1311.26	9.14%	-
2	Wheat and meslin	673.45	4.69%	42.16%
3	Fruit juices (including grape must) and vegetable juices	565.24	3.94%	9.26%
4	Petroleum oils, other than crude	400.12	2.79%	62.11%
5	Flours, meals and pellets, of meat or meat offal, of fish or of crustaceans	368.07	2.57%	33.66%
6	Harvesting or threshing machinery, including straw or fodder balers; grass or hay mowers	328.18	2.29%	3.42%
7	Calculating machines and pocket-size data recording	289.74	2.02%	1147.18%
8	Casks, barrels, vats, tubs and other coopers' products	263.00	1.83%	9.07%
9	Paper, paperboard, cellulose wadding and webs of cellulose fibres, coated, impregnated	261.51	1.82%	69.28%
10	Articles for the conveyance or packing of goods, of plastics; stoppers, lids, caps and other closures, of plastics	254.58	1.77%	10.99%
TOTAL IMPORTS		14 347.22	100.00%	4.61%

Source: Quantec, 2025. Author own calculations based on Quantec data. Note: Values are in ZAR, current prices

5. Investments

This section provides information on FDI in the Cape Winelands district, including an outline of sector opportunities and government initiatives in the Cape Winelands.

5.1 Foreign Direct Investment

Table 9 illustrates inward FDI in the Cape Winelands over the past ten years, from January 2015 to September 2025. During the period, the region attracted 16 FDI projects which had an accumulative capital investment (capex) value of ZAR8,025.68m (or ZAR8.03bn) and which generated an estimated 757 jobs. The largest share of these projects materialised in the town of Stellenbosch which benefited from nine out of the 13 FDI projects.

The top three (by capex) sectors for inward FDI during this period were the food and beverages sector with investments in this sector valued at ZAR5,290.56m, followed by business services (ZAR1,181.65m) and software and IT services (ZAR676.49m).

Table 9: FDI in the Cape Winelands district, January 2015–September 2025

DATE	INVESTING COMPANY	SOURCE COUNTRY	DESTINATION CITY	SECTOR	BUSINESS ACTIVITY	CAPEX (ZARm)	JOBS
Nov-24	CareerScout	Netherlands	Stellenbosch	Business services	Business Services	426.45	12
Nov-24	Elize Partners	Switzerland	Stellenbosch	Business services	Business Services	426.45	12
Nov-24	Strategy&Ops Consultancy	Australia	Paarl	Business services	Business Services	426.45	12
Nov-23	Hensoldt South Africa	Germany	Stellenbosch	Space & defence	Sales, Marketing & Support	72.1	63
Apr-23	Lactalis South Africa	Belgium	Bonnievale	Food & Beverages	Manufacturing	117.35	8
Apr-22	Lotus Bakeries	Belgium	Wolseley	Food & Beverages	Manufacturing	201.11	14
Sept-21	TrainerRoad	United States	Stellenbosch	Software & IT services	Sales, Marketing & Support	79.77	9
Jul-21	Trevali Mining Corporation	Canada	Stellenbosch	Software & IT services	Research & Development	503.15	47
Mar-21	Worth Internet Systems	Netherlands	Stellenbosch	Software & IT services	Business Services	93.57	66
Feb-21	Lotus Bakeries	Belgium	Wolseley	Food & Beverages	Manufacturing	527.7	102
Feb-20	Skema	France	Stellenbosch	Business services	Education & Training	105.85	46
Jun-19	Lotus Bakeries	Belgium	Wolseley	Food & Beverages	Manufacturing	4,380.00	300
Nov-17	International Workplace Group (Regus)	Switzerland	Paarl	Real estate	Business Services	29.15	8
Apr-17	Nedbank Private Wealth (Fairbairn Private Bank)	United Kingdom	Stellenbosch	Financial services	Business Services	145.73	27
Jan-17	Liquorice	France	Stellenbosch	Business services	Business Services	426.45	12
Mar-15	Don Limon	Germany	Paarl	Food & Beverages	Sales, Marketing & Support	64.4	19
TOTAL						8,025.68	757

Source: fDi Markets, a service from The Financial Times 2025. All Rights Reserved.

5.2 Sector opportunities and government initiatives in the Cape Winelands district

The economy in the Cape Winelands district is underpinned by various sectors. International trade, tourism and private and public sector investments are key to the region's economy, while the region's strategic location, coupled with its natural beauty and tourism appeal, attracts businesses and investors. As such, policies should be in place to create a conducive environment for these sectors to succeed. These ideas (taken from key economic publications) are discussed below.

Cape Wineland's comparative advantage

The Western Cape government's Municipal Economic Review & Outlook (MERO)³ identifies comparative advantages in sectors in the Cape Winelands.

When a sector has a comparative advantage in a region relative to the rest of the country, it enables businesses to capitalise on its local strengths in efficiency and production. The sector is also able to meet local needs while serving a larger market outside the region. A location quotient greater than one indicates that a sector 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.

The location quotient table (Table 10) shows that Cape Winelands has a slight advantage in the construction; and wholesale and retail trade, catering and accommodation sectors. On the other hand, services sectors including finance, insurance, real estate, and business services meet most local needs. Sectors like electricity, gas, and water; general government; manufacturing; and community, social, and personal services rely on imports to fulfil local demands.

Identifying these characteristics then raises the need for targeted government policies and incentives, including interventions that will promote long term investment and innovation, and further boost the region's growth potential. For example, sectors such as construction and business services currently exhibit low to medium comparative advantages but are on a growth trajectory. Key among these factors is the availability of skilled labour which is essential for both sectors to thrive. The district's educational institutions and training programmes play a crucial role in developing a workforce equipped with the necessary skills. Infrastructure developments in sectors such as the transport, storage and communication sector could boost economic growth by enhancing efficiency and reach through transportation networks and digital connectivity.

Table 10 shows key infrastructure projects in the Cape Winelands, planned by the Western Cape government, which will support these initiatives.

Table 10: Location quotient in terms of GVA, Cape Winelands, 2023

	GVA Location Quotient	Contribution to GDP
Agriculture, forestry and fishing	2.32	10.0%
Mining and quarrying	0.7	0.1%
Manufacturing	0.99	13.9%
Electricity, gas and water	0.84	1.6%
Construction	1.22	4.5%
Wholesale and retail trade, catering and accommodation	1.11	15.0%
Transport, storage and communication	0.87	9.7%
Finance, insurance, real estate and business services	0.83	27.9%
General government	0.94	5.5%
Community, social and personal services	0.99	11.7%

Source: Adopted from Western Cape Government Municipal Economic Review and Outlook 2024-25: Cape Winelands District

Government initiatives in the Cape Winelands

The Cape Winelands District Integrated Development Plan (IDP) 2023/2024⁴ lists the following planned and funded provincial infrastructure projects and programmes in the Cape Winelands district for the Medium-Term Expenditure Framework (MTEF) period 2023/24–2025/26, as presented in Table 11:

³ Western Cape Government. (2024). Municipal Economic Review and Outlook 2024-25: Cape Winelands District. Cape Town: Western Cape Government. Available at: <https://www.westerncape.gov.za/treasury/files/wcg-blob-files?file=2025-04/merp-2024-cape-winelands.pdf&type=file> [Accessed: 15 November 2025].

⁴ Cape Winelands District Municipality. (2023). Integrated Development Plan 2023/24. Stellenbosch: Cape Winelands District Municipality. Available at: https://lg.treasury.gov.za/supportingdocs/DC2/DC2_IDP%20Final_2024_Y_20230606T160242Z_stoffel.pdf [Accessed: 15 November 2025].

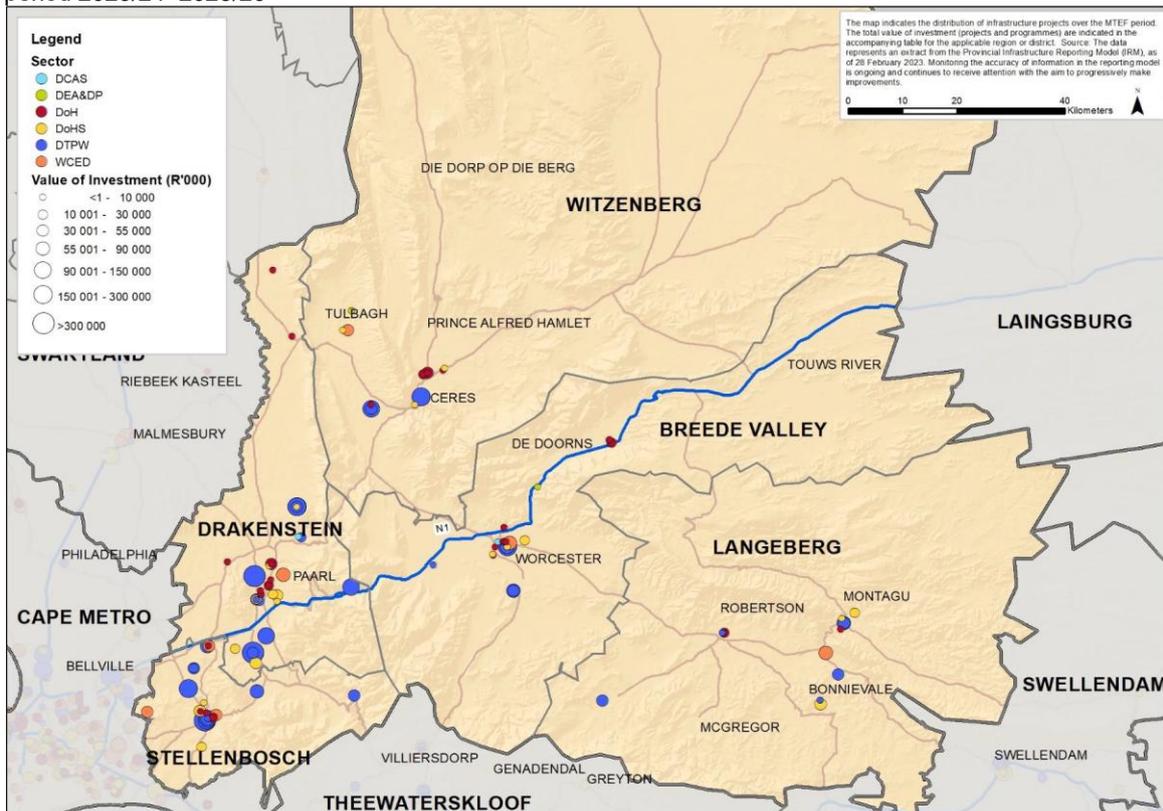
Table 11: Summary of planned and funded provincial infrastructure projects and programmes in the Cape Winelands district for the MTEF period 2023/24–2025/26

Sector	No of Projects	Value of infrastructure projects & programmes (R'000)						Grand Total (R'000)
		Infrastructure Transfers - Capital	Maintenance and Repairs	New or Replaced Infrastructure	Non-Infrastructure	Rehabilitation, Renovations & Refurbishment	Upgrading and Additions	
Arts & Culture	2	1 700	0	0	0	0	0	1 700
DEA&DP (Cape Nature)	3	0	0	0	0	0	9 500	9 500
Education	7	0	0	337 000	0	0	40 000	377 000
Health	52	0	0	37 792	77 728	85 991	83 293	284 804
Human Settlements	39	620 832	0	0	0	0	0	620 832
Transport & Public Works	41		693 637	681 000	0	2 460 316	359 175	4 194 128
Grand Total	144	622 532	693 637	1 055 792	77 728	2 546 307	491 968	5 487 964

Source: Adopted from Cape Winelands District IDP 2023/2024

The map (Figure 15) shows the spatial distribution of the provincial infrastructure investment projects in the municipality for the MTEF period 2023/24–2025/26.

Figure 15: Provincial infrastructure investment projects in the Cape Winelands District Municipality for the MTEF period 2023/24–2025/26



Source: Adopted from Cape Winelands District IDP 2023/2024

5.3 Companies

The top companies based in the Cape Winelands, and ranked according to turnover and employment levels, are listed in Table 12 and Table 13:

Table 12: Top companies (by turnover) in the Cape Winelands district

RANK	COMPANY NAME	REGISTERED CITY	TURNOVER (ZARm)	FINANCIAL YEAR
1	SIHPL (PTY) LTD	Stellenbosch	136 967.00	2015
2	MEDICLINIC INTERNATIONAL (RF) (PTY) LTD	Stellenbosch	65 235.57	2022
3	CAPITEC BANK HOLDINGS LTD	Paarl	64 000.00	2025
4	REMGRO LTD	Stellenbosch	51 145.00	2024
5	DISTELL GROUP HOLDINGS LTD	Stellenbosch	34 133.55	2022
6	KAL GROUP LTD	Paarl	21 734.92	2024
7	RFG HOLDINGS LTD	Paarl	8 006.34	2024
8	QUANTUM FOODS HOLDINGS LTD	Wellington	6 332.08	2024
9	CASIDRA SOC LTD	South Paarl	43.31	2024

Source: WhoOwnsWhom, 2025

Table 13: Top 20 companies (by employment levels) in the Cape Winelands district

RANK	COMPANY NAME	REGISTERED CITY	NO. OF EMPLOYEES	EMPLOYEE NOTES
1	MEDICLINIC INTERNATIONAL (RF) (PTY) LTD	Stellenbosch	32 625	(Group) (16,848 - Southern Africa) (Est.)
2	CAPITEC BANK HOLDINGS LTD	Stellenbosch	16 935	(Group)
3	IN 2 FOOD GROUP (PTY) LTD	Paarl	8 000	
4	AGRIMARK OPERATIONS LTD	Paarl	7 423	(Group)
5	KAL GROUP LTD	Paarl	6 842	(Group) (5,938 - Permanent; 904 - Non-permanent)
6	RFG FOODS (PTY) LTD	Paarl	5 829	(Group) (3,401- Permanent; 2,428 - Contractors) (1,441 - International)
7	DISTELL GROUP HOLDINGS LTD	Stellenbosch	4 609	(Group)
8	HUNGRY LION FAST FOODS (PTY) LTD	Stellenbosch	4 000	
9	LACTALIS SOUTH AFRICA (PTY) LTD	Stellenbosch	3 127	(Est.)
10	QUANTUM FOODS (PTY) LTD	Wellington	2 584	(Group) (1,875 - South Africa: 505 - salaried; 1,316 - waged; 709 - other African countries)
11	AGRICULTURAL RESEARCH COUNCIL OF SA - ARC INFRUITEC-NIETVOORBIJ (INSTITUTE FOR DECIDUOUS FRUIT VINES & WINE)	Stellenbosch	2 500	
12	DUTOIT AGRI (PTY) LTD	Ceres	1800	(8,000 employees - in peak season) (Est.)
13	BESTER VOER EN GRAAN (PTY) LTD	Stellenbosch	1 314	
14	HERO TELECOMS (PTY) LTD	Stellenbosch	1 296	(Est.)
15	PEAK TIMBERS LTD	Stellenbosch	1 200	(Est.)
16	ER24 EMS (PTY) LTD	Stellenbosch	1 050	(Est.)
17	LOWER ORANGE RIVER DIAMONDS (PTY) LTD	Stellenbosch	750	(Est.)
18	MPACT PAARL PROPERTY (PTY) LTD	Paarl	730	
19	A P L CARTONS (PTY) LTD	Worcester	459	(Est.)
20	GRW ENGINEERING (PTY) LTD	Worcester	433	(Est.)

Source: WhoOwnsWhom, 2025

6. Tourism

The statistics discussed in this section are from the Wesgro Regional Visitor Tracking Surveys.

Wesgro Regional Visitor Tracking Surveys

Methodology

This report provides an overview of the tourism trends and patterns in the Cape Winelands region. The findings will illustrate key visitor trends obtained from the regional visitor tracking surveys.

Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends in the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the responses from tourists in the respective tourism offices across the Western Cape and would thus represent a sample of the visitors. Therefore, where statistically relevant, absolute numbers may be given; however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys in the tourism industry for determining key trends (Wesgro Regional Visitor Tracking Survey, 2024).

Definition

Visitor: Any person travelling to a place other than his/her usual environment for less than 12 months and whose main purpose for the travel is other than the exercise of an activity to be remunerated at the place visited (South Africa Tourism, 2025).

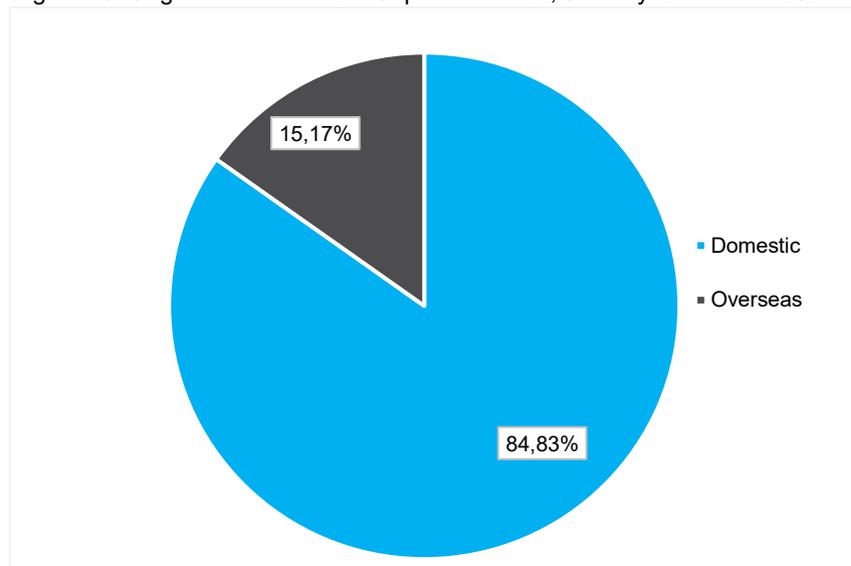
Sample size

Between January and December 2024, 2,123 responses to the regional visitor tracking surveys were received from select tourism offices in the Cape Winelands.

6.1 Origins of visitors

The domestic market accounted for the largest share of respondents (84.83%) who visited the district between January and December 2024, whereas 15.17% of respondents were overseas visitors. This can be seen in Figure 16.

Figure 16: Origin of visitors in the Cape Winelands, January–December 2024

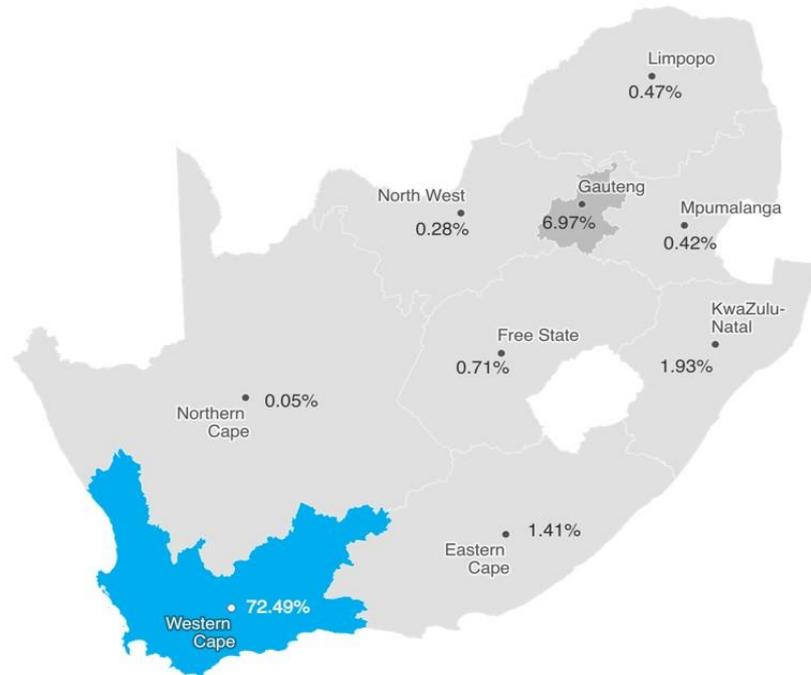


Source: Wesgro Regional Visitor Tracking Surveys, 2024

Origin of domestic visitors

Figure 17 shows that from January to December 2024, the largest share of domestic visitors to the district came from the Western Cape (72.49%), which indicates that the Cape Winelands district is a popular destination for locals in the province. Visitors from Gauteng held a share of 6.97%, followed by 1.93% of visitors from KwaZulu-Natal.

Figure 17: Origin of domestic visitors in the Cape Winelands, January–December 2024



Source: Wesgro Regional Visitor Tracking Surveys, 2024

Origin of overseas visitors

According to Figure 18, the largest share of overseas travellers to the Cape Winelands originated from the United States which accounted for 27.02% of the total number of international visitors in 2024. The United Kingdom followed with a 20.81% share of visitors, while Germany accounted for 18.94% of arrivals. Together, these three markets made up the dominant share of overseas tourists who visited the Cape Winelands district.

Figure 18: Origin of overseas visitors in the Cape Winelands, January–December 2024

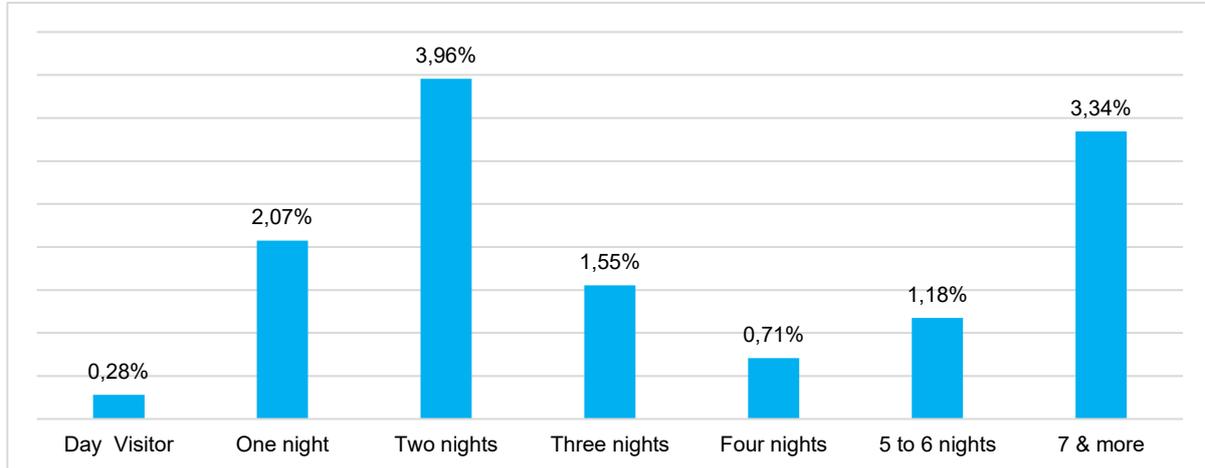


Source: Wesgro Regional Visitor Tracking Surveys, 2024

6.2 The average length of stay in the region

Figure 19 shows that the largest proportion of visitors to the Cape Winelands were overnight travellers, with 3.96% of visitors staying for two nights. This was followed by visitors staying for seven nights or more (3.34%). This pattern indicates that the Cape Winelands attracts a high share of short-stay visitors, likely weekend or leisure travellers, while a smaller segment consists of long-stay visitors who may be exploring the region's diverse towns and experiences.

Figure 19: The average length of stay in the Cape Winelands region, January–December 2024



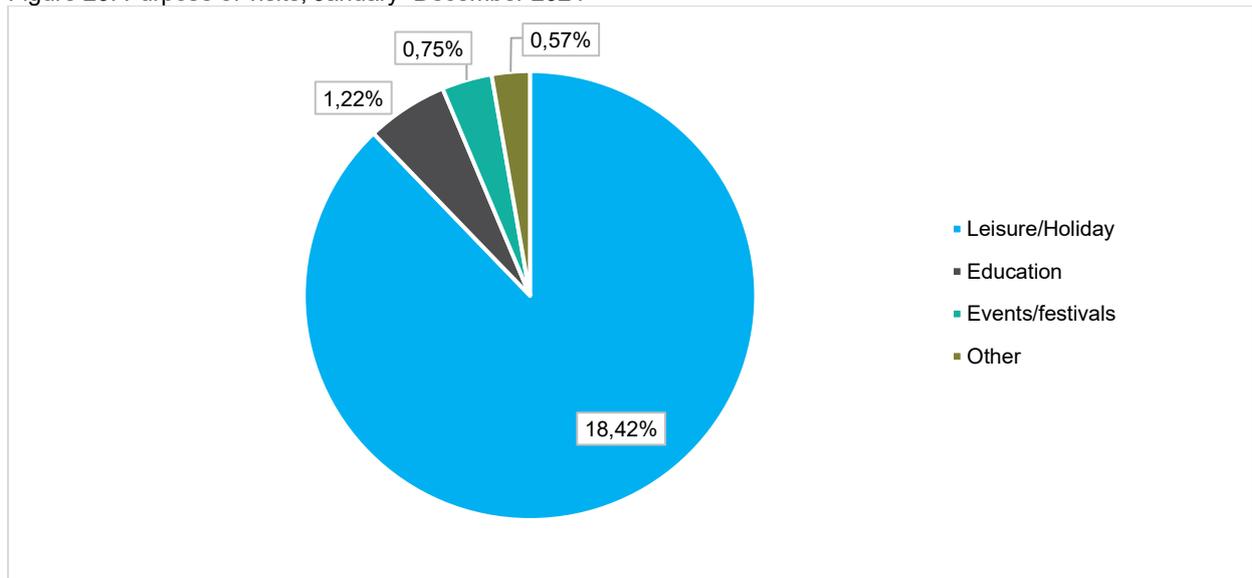
Source: Wesgro Regional Visitor Tracking Surveys, 2024

Note: 86.91% of the respondents did not indicate their average length of stay in the region.

6.3 Purpose of visit

Figure 20 shows that most visitors travelled for leisure or holiday purposes (18.42%). This highlights the destination's strong appeal as a relaxation and getaway location. Smaller proportions of visitors indicated education (1.22%), events or festivals (0.75%), and other purposes (0.57%) as their primary reasons for travel.

Figure 20: Purpose of visits, January–December 2024



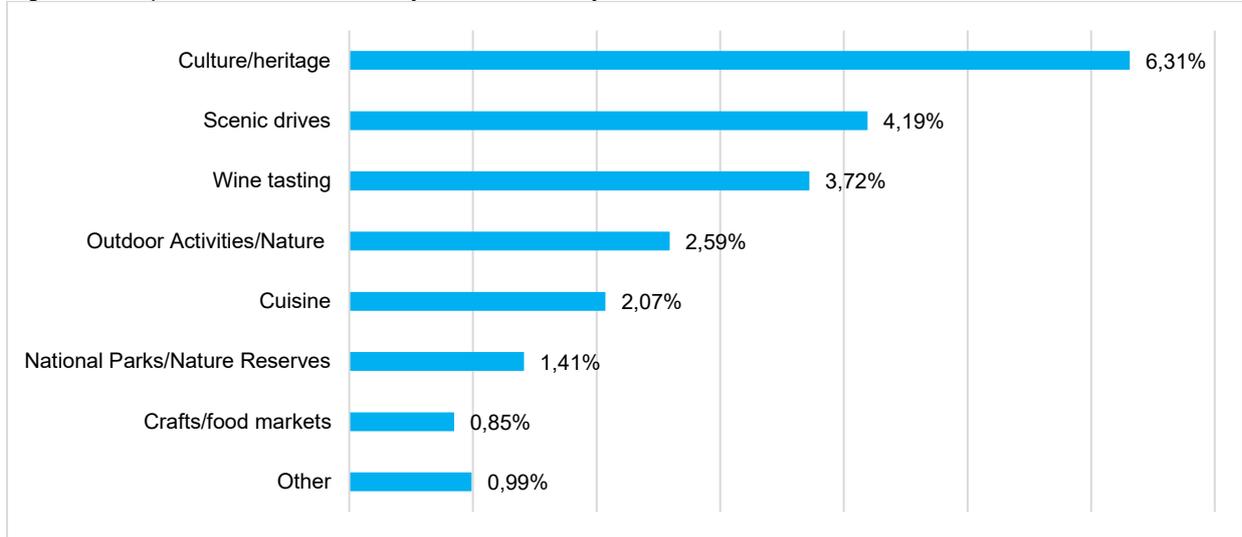
Sources: Wesgro Regional Visitor Tracking Surveys (2024)

Note: 79.04% of the respondents to the survey did not indicate their purpose of visit.

6.4 Top visitor activities in the Cape Winelands

Among the variety of activities offered and enjoyed by tourists, several emerged as particularly popular for the region. These included exploring the region's rich culture and heritage, taking scenic drives, participating in outdoor activities and indulging in the area's renowned wine and cuisine. This is illustrated in Figure 21.

Figure 21: Top activities undertaken by visitors, January–December 2024



Source: Wesgro Regional Visitor Tracking Surveys (2024)

Note: 76.87% of the respondents to the survey did not specify their activities undertaken in the region.

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