

# Garden Route

# January 2026

## Executive Summary

This destination sector fact sheet provides key trade- and investment-related statistics for the Garden Route district municipality. Specifically, it shows the Garden Route district's area, population, employment, trade, investment, and tourism trends in relation to the rest of the world. The key highlights are provided below:

### Economy

- The Garden Route district's economy grew by 1.2% y-o-y in 2024, reaching a value of ZAR45.98bn – up from ZAR45.42bn in 2023.
- The George local municipality was the largest contributor to economic output in the Garden Route in 2024, accounting for 40.09% of the total regional gross value-added (RGVA). Mossel Bay and Oudtshoorn were the second and third largest contributors, accounting for 17.55% and 12.45% of the RGVA respectively.
- Looking at different sectors, the finance, insurance, real estate, and business services sector was the largest contributing sector to the district's RGVA in 2024, accounting for 34.66% of total output. The wholesale and retail trade, catering, and accommodation sector followed with a share of 14.14%, and the manufacturing sector was the third largest contributor at 13.00%.
- The top-employing sector in the district in 2024 was the wholesale and retail trade, catering and accommodation sector which employed 55,306 people. This was followed by the finance, insurance, real estate, and business services sector which employed 43,774 people; and by the community, social and personal services sector with 42,239 employees.

### Trade

- The total value of exports from the Garden Route district amounted to ZAR4.97bn in 2024, a decrease of 3.59% on the ZAR5.16bn earned in 2023. Imports in turn increased by 1.08% y-o-y to a cost of ZAR3.06bn in 2024, up from ZAR3.02bn incurred in 2023.
- The United States was the top destination market for the district's exports in 2024 which amounted to a value of ZAR931.72m. This was equivalent to 18.740% of the region's total global exports. The Netherlands followed with exports to that country valued at ZAR529.30m, while China was in third place with ZAR421.03m worth of Garden Route exports.
- China was the district's top import source market in 2024, with imports from China costing ZAR555.09m, and equivalent to 18.17% of the district's total import costs incurred. This was followed by United States with imports costing ZAR280.38m and Italy (ZAR205.10m).
- Looking at products, the district's top export product in 2024 was seeds, fruit, and spores, with earnings of ZAR1.02bn. This was equivalent to 20.57% of the total export earnings. The top import category was optical fibres and optical fibre bundles which cost ZAR132.47m, equivalent to 4.34% of all import costs incurred in 2024.

### Investments

- Between January 2015 and September 2025, as reported by fDI Markets, four foreign direct investment (FDI) projects materialised in the region with investments from four multinational companies. These projects had a cumulative capital investment of ZAR274.59m and led to the creation of 73 jobs.

### Tourism

- Based on the findings of the 2024 annual mobile location insights, the Garden Route & Klein Karoo district attracted a higher influx of domestic tourists than international visitors. More than 205,395 domestic tourists visited the district in 2024, primarily from the municipalities of Cape Town, Nelson Mandela Bay, and the city of Johannesburg.
- The average length of stay for domestic tourists in the region was between 1.8 and 2.1 days, and international visitors spent between 1.6 and 2.1 days from January to December in 2024.
- Information relating to passenger movement at George airport is also provided in this factsheet.

[Cape Town and the Western Cape – A Leading Regional Economy](#)

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## 1. Area

The Garden Route district is one of six districts in the Western Cape, as shown in Figure 1. Located in the south-eastern part of the province, it occupies a total land area of 23,331km<sup>2</sup> and had an estimated population of 643,604 in 2024. Looking at population groups, the largest group in the district was Coloureds (53.49%), followed by Black Africans (30.29%), Whites (15.77%) and Asians/Indians (0.45%).

Figure 1: District municipalities in the Western Cape



The Garden Route district encompasses the towns of George, Plettenberg Bay, Mossel Bay, and Oudtshoorn. It is known for its diverse landscapes, including lush forests, scenic beaches and towering mountains. The Garden Route is a major tourism destination, attracting visitors who explore its national parks, observe the wildlife, and engage in outdoor adventures. The local economy thrives on tourism, agriculture (especially citrus and wine) and retail, with key economic hubs in George and Knysna. Mossel Bay also hosts important port and energy infrastructure. Figure 2 illustrates the different municipal areas in the Garden Route district.

Figure 2: Local municipalities in the Garden Route district



## 2. Population

Table 1 shows the key indicators for the Garden Route district.

Table 1: Key indicators, Garden Route district

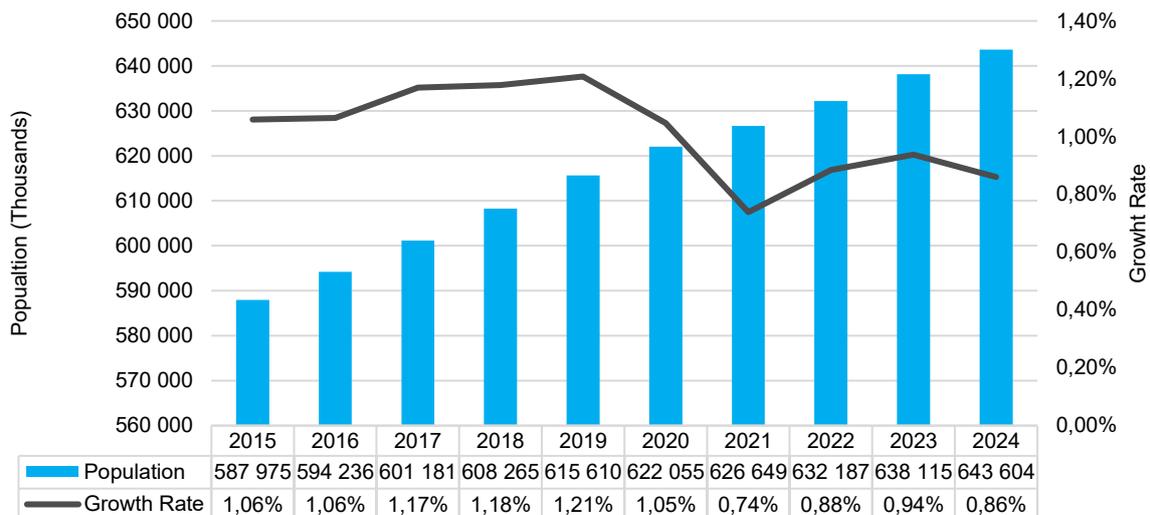
INDICATOR	
Executive Mayor	Ald. Marais Kruger
Population estimates (2024)	643,604
Population groups (2024 estimates)	Coloureds (53.49%), Black Africans (30.29%), Whites (15.77%) and Asians/Indians (0.45%).
Real GVA (2024)	ZAR45.98 billion
Real GVA growth rate (2024)	1.2%
Unemployment rate (2024 average)	20.21%
Gini coefficient (2024) based on current income per capita	0.545
Human Development Index (HDI) (2024)	0.754

Sources: Garden Route District Municipality ; Quantec, 2025

### 2.1 Demographics

The Garden Route district's population was estimated at 643,604 people in 2024. It is the third most populous district in the Western Cape, after the City of Cape Town and the Cape Winelands district. The district accounted for 9% of the Western Cape's population in 2024 and its population is estimated to have grown by an annual average rate of 1.1% during the 10 year-period from 2015 to 2024. This is illustrated in Figure 3.

Figure 3: Garden Route district's population estimates, 2015–2024



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

Table 2 shows the Garden Route district's population breakdown according to racial groups. The Coloured population is the largest group in the district, accounting for 53.49% of the total population in 2024. Black Africans accounted for 30.29% of the population, Whites for 15.77%, and Asians/Indians for 0.45%.

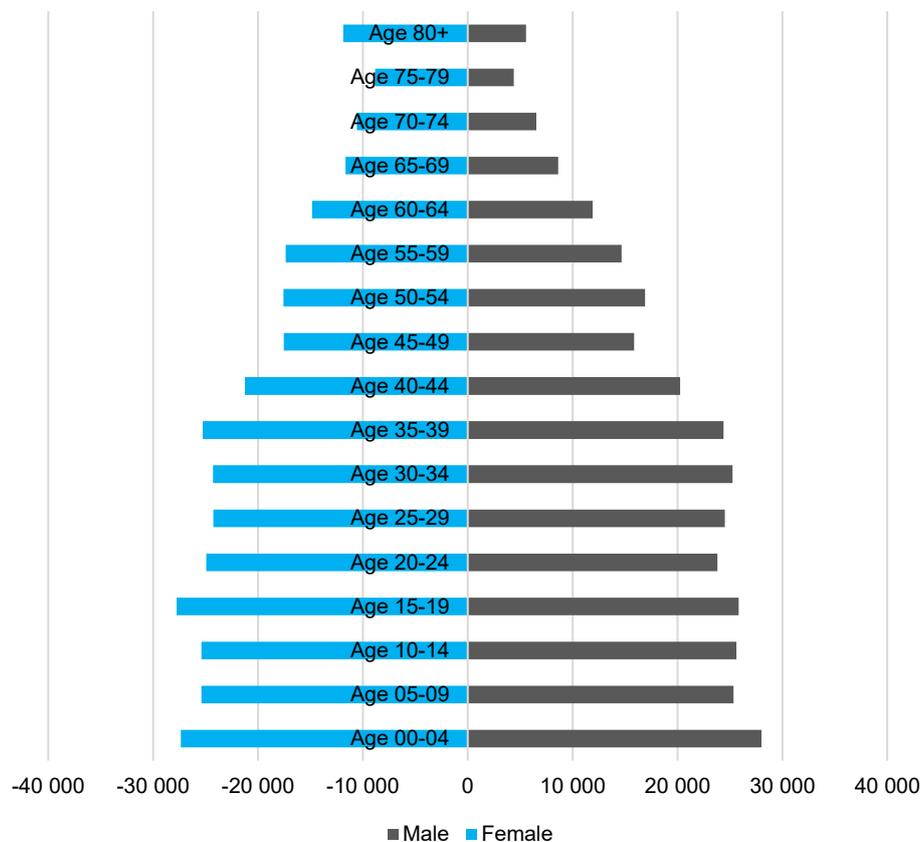
Table 2: Population breakdown by group, Garden Route, 2023–2024

GROUP	2023	2024	% SHARE, 2024	% CHANGE, 2023-2024
Coloured	342 186	344 246	53.49%	0.60%
Black African	191 991	194 939	30.29%	1.54%
White	101 120	101 528	15.77%	0.40%
Asian/Indian	2 818	2 890	0.45%	2.57%
<b>TOTAL</b>	<b>638 115</b>	<b>643 604</b>	<b>100.00%</b>	<b>0.86%</b>

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

Figure 4 illustrates the age and gender breakdown of the Garden Route district’s population. As shown in the graph, the largest percentage of the population in 2024 was below 39 years of age, which indicates that most of the population is still young.

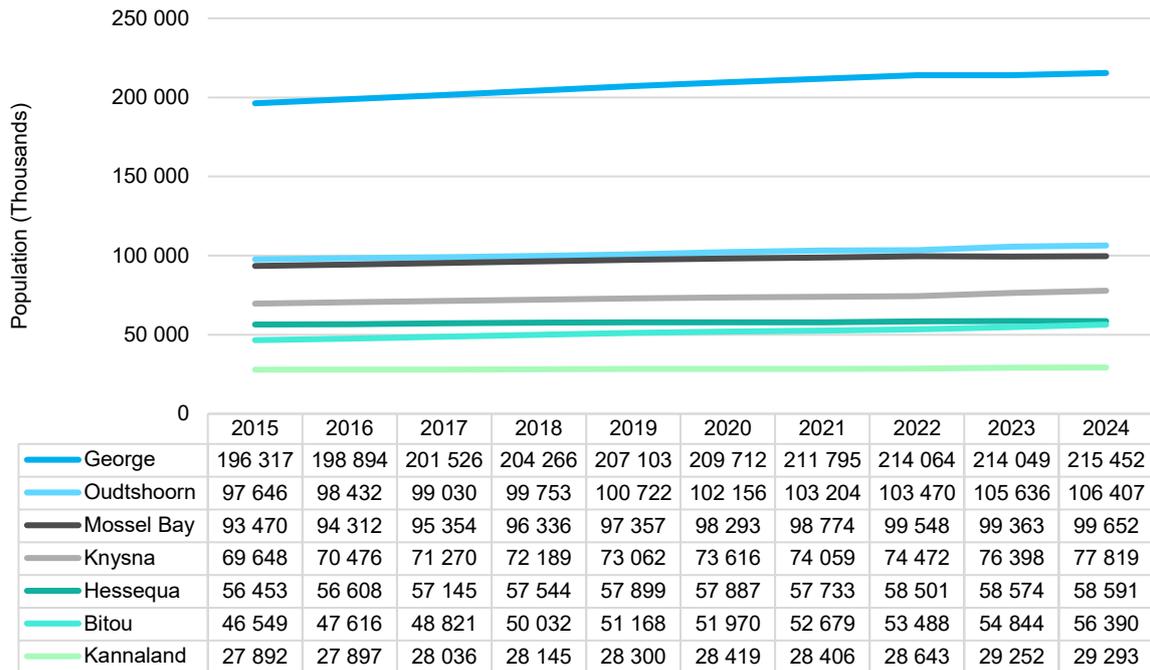
Figure 4: Garden Route population by age & gender, 2024



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

George is the most populated municipality in the Garden Route district, as shown in Figure 5. The municipality had an estimated population of 215,442 people in 2024. This was followed by the Oudtshoorn and Mossel Bay with 106,407 and 99,652 inhabitants respectively.

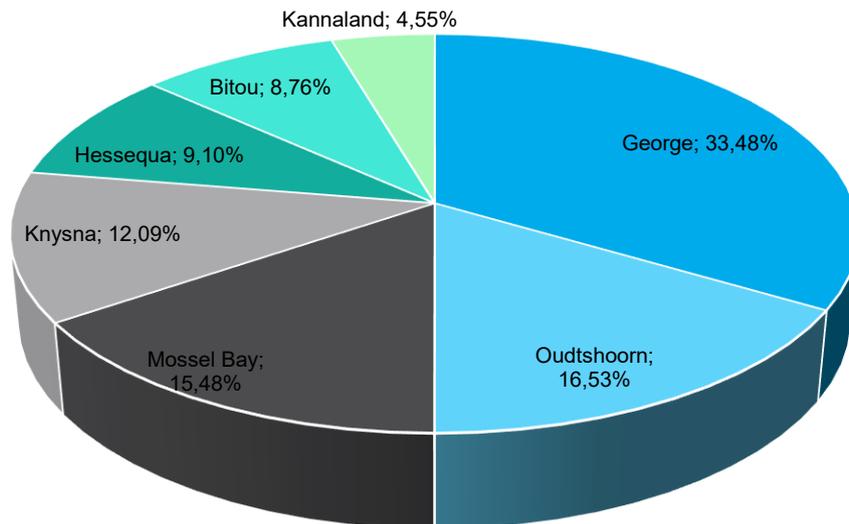
Figure 5: Population figures for local municipalities in the Garden Route district, 2015–2024



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

Figure 6 illustrates the sub-regional breakdown of the population in the Garden Route district in 2024. The largest proportion of the population lives in the George municipality (35.48%), followed by those living in Oudtshoorn (16.53%) and in Mossel Bay (15.48%).

Figure 6: Population breakdown by sub-region in 2024, Garden Route

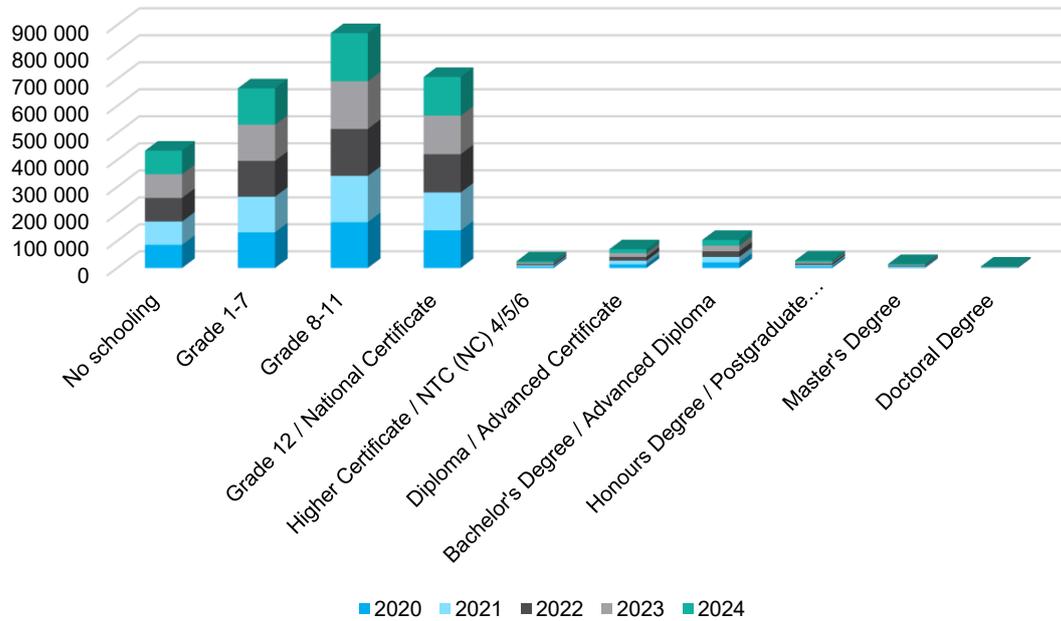


Source: Quantec, 2025. Author own calculations based on Quantec data

## 2.2 Education

Figure 7 shows the levels of education in the district between 2020 and 2024. An estimated 27.82% of the population had attended school from Grades 8 to 11 by 2024. Some 21.01% of the population were at school from Grade 1 to Grade 7, while an estimated 22.29% of the population attained Grade 12 (Matric) in 2024. Those with bachelors, master’s and higher education degrees totalled 4.81%.

Figure 7: Levels of education in Garden Route, 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

### 3. Employment

Table 3 provides a snapshot of indicators for employment in the Garden Route district in 2024.

Table 3: Employment indicators, 2024

Indicator	
Population aged 15-64 years (2024 estimates)	643,604
Working-age population (15-64 years)	418,467
Labour force (economically active)	284,196
Labour force participation rate	67.91%
Employed	226,764
Labour absorption rate	54.19%
Unemployed	57,432
Unemployment rate (%)	20.21%

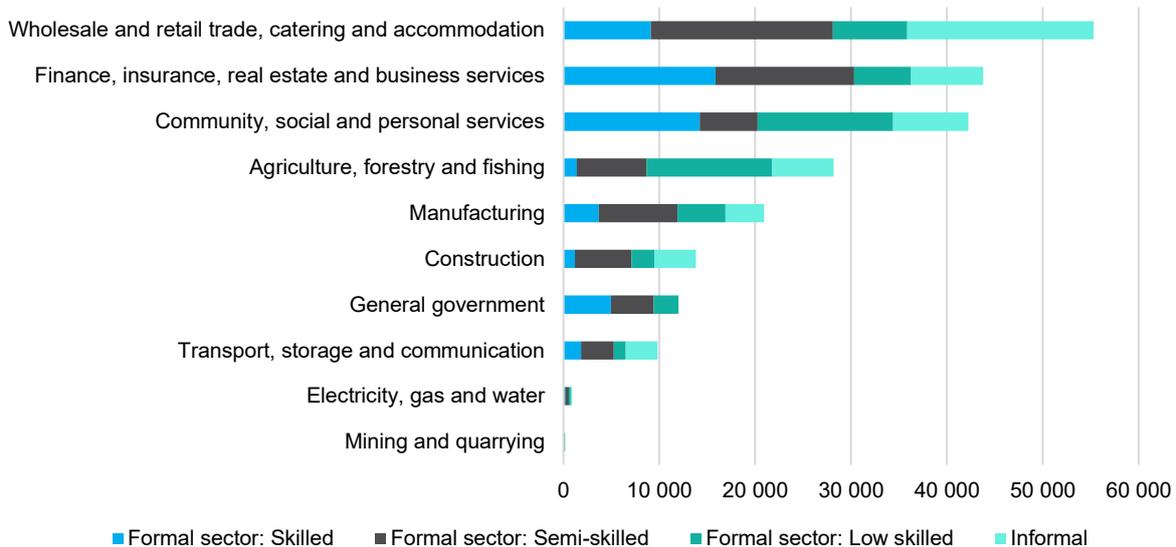
Source: Quantec, 2025

#### 3.1 Sector employment

The wholesale and retail trade, catering and accommodation sector was the largest employing sector in the district in 2024 with 55,306 employees. This was followed by the finance, insurance, real estate and business services sector, which employed 43,774 people. The community, social and personal services sector in turn employed 42,239 people.

Looking at employment figures and levels of skill in the different sectors, the finance, insurance, real estate and business services sector employed the largest number of skilled people (15,487). The wholesale and retail trade, catering and accommodation sector employed mostly semi-skilled workers (18,990) and those engaged in informal employment (19,453). Low-skilled workers (14,115) were mostly employed in the community, social and personal services sector. This can be seen in Figure 8.

Figure 8: Employment figures and levels of skill in different sectors in the Garden Route, 2024



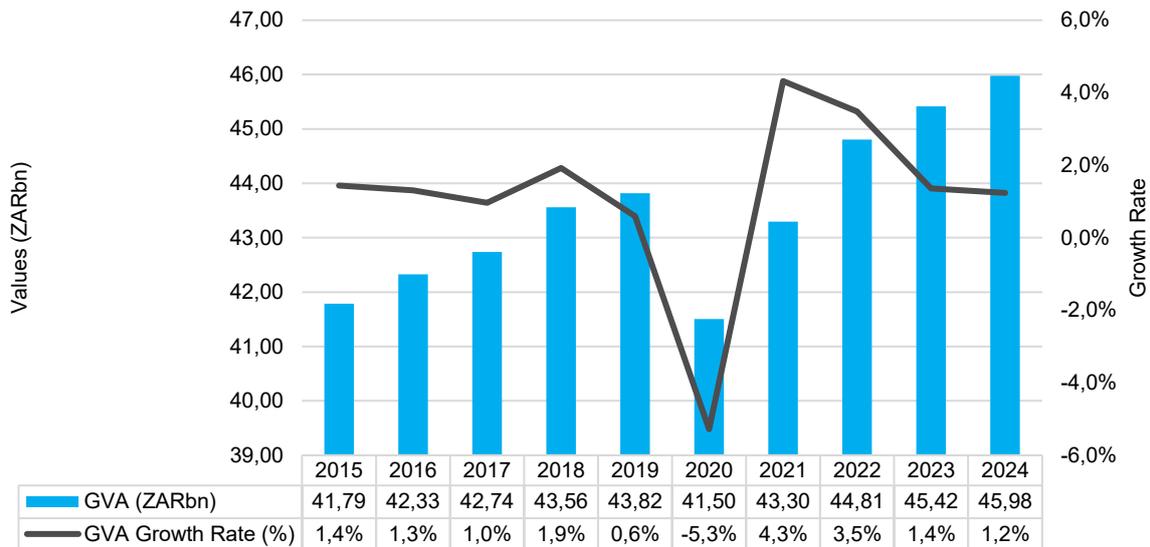
Source: Quantec, 2025. Author's own calculations based on Quantec data

## 4. Economic Overview

### 4.1 Regional Gross Value Added

The economy in the Garden Route district grew by 1.2% y-o-y in 2024, reaching a RGVA of ZAR45.98bn, an increase from ZAR45.42bn in 2023. This is shown in Figure 9. Output expanded by 10.0% between 2015 and 2024, from ZAR41.79bn in 2015 to ZAR45.98bn in 2024. On average, RGVA grew at an average annual growth rate of 1.1% from 2015 to 2024.

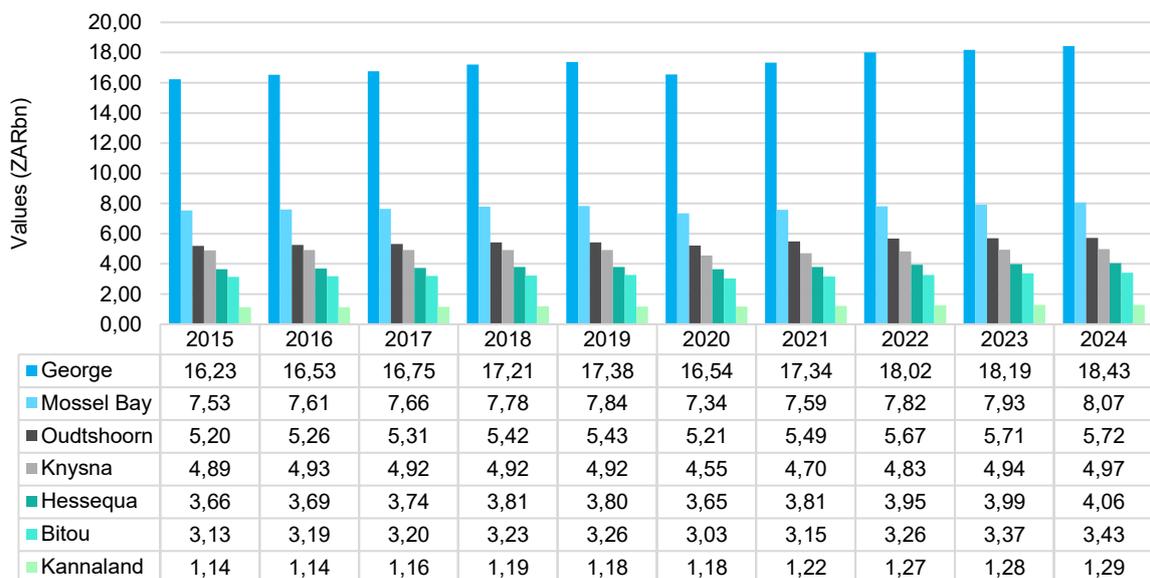
Figure 9: Garden Route district's real RGVA & growth, 2015–2024



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

Figure 10 shows the contributory share from local municipalities in the Garden Route district to RGVA in 2015–2024. The George local municipality was the largest contributor to economic output in the Garden Route district throughout the review period, and in 2024, George added ZAR18.43bn to the district's economic output, equivalent to 40.09% of the district's total RGVA. Mossel Bay and Oudtshoorn were the second and third largest contributors to the district's GVA in the year, with contributions of 17.55% and 12.45% respectively.

Figure 10: RGVA contributions from local municipalities to the Garden Route district, 2015–2024



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

## 6.1 Sector GVA

The finance, insurance, real estate, and business services sector was the largest contributor to the Garden Route district's GVA in 2024, accounting for 34.66% of the total GVA. This can be seen in Table 4. The wholesale and retail trade, catering, and accommodation sector followed with a share of 14.14%, while the manufacturing sector contributed a share of 13.00%.

Table 4: Breakdown of contributions from different sectors to RGVA, 2020–2024

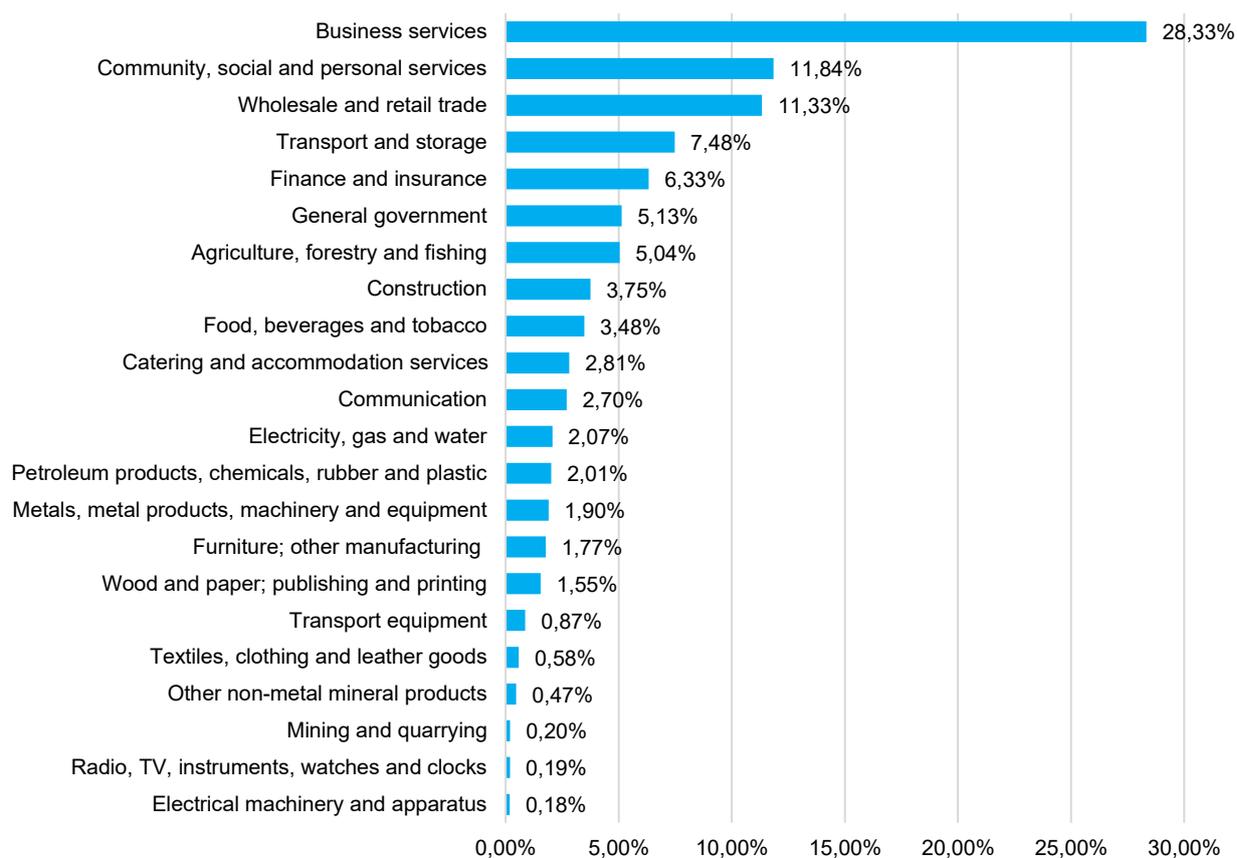
SECTOR	VALUE 2020 (ZARbn)	VALUE 2021 (ZARbn)	VALUE 2022 (ZARbn)	VALUE 2023 (ZARbn)	VALUE 2024 (ZARbn)	% SHARE 2024	% CHANGE, 2023-2024
I08: Finance, insurance, real estate and business services [QSIC 8]	13.75	14.34	15.03	15.32	15.94	34.66%	4.0%
I06: Wholesale and retail trade, catering and accommodation [QSIC 6]	5.97	6.25	6.52	6.56	6.50	14.14%	-0.9%
I03: Manufacturing [QSIC 3]	5.30	5.85	5.87	5.97	5.98	13.00%	0.2%
I10: Community, social and personal services [QSIC 92-96, 99]	4.69	4.84	4.91	5.05	5.44	11.84%	7.9%
I07: Transport, storage and communication [QSIC 7]	3.79	4.02	4.50	4.72	4.68	10.17%	-1.0%
I09: General government [QSIC 91]	2.42	2.37	2.37	2.37	2.36	5.13%	-0.4%
I01: Agriculture, forestry and fishing [QSIC 1]	2.54	2.62	2.70	2.57	2.32	5.04%	-9.8%
I05: Construction [QSIC 5]	2.00	1.93	1.87	1.85	1.72	3.75%	-6.7%
I04: Electricity, gas and water [QSIC 4]	0.95	0.97	0.95	0.91	0.95	2.07%	4.2%
I02: Mining and quarrying [QSIC 2]	0.10	0.11	0.09	0.09	0.09	0.20%	-0.8%
<b>Total</b>	<b>41.50</b>	<b>43.30</b>	<b>44.81</b>	<b>45.42</b>	<b>45.98</b>	<b>100.00%</b>	<b>1.2%</b>

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

### Sub-sector distribution

Figure 11 illustrates the contributions from sub-sectors to the RGVA. The business services sector was the largest contributor in 2024, which at a value of ZAR13.02bn was equivalent to 28.33% of output. This was followed by community, social and personal services with a contribution of ZAR5.44bn (11.84%); and wholesale and retail trade with a share of ZAR5.21bn (11.33%).

Figure 11: Garden Route district's sub-sector distribution, 2024



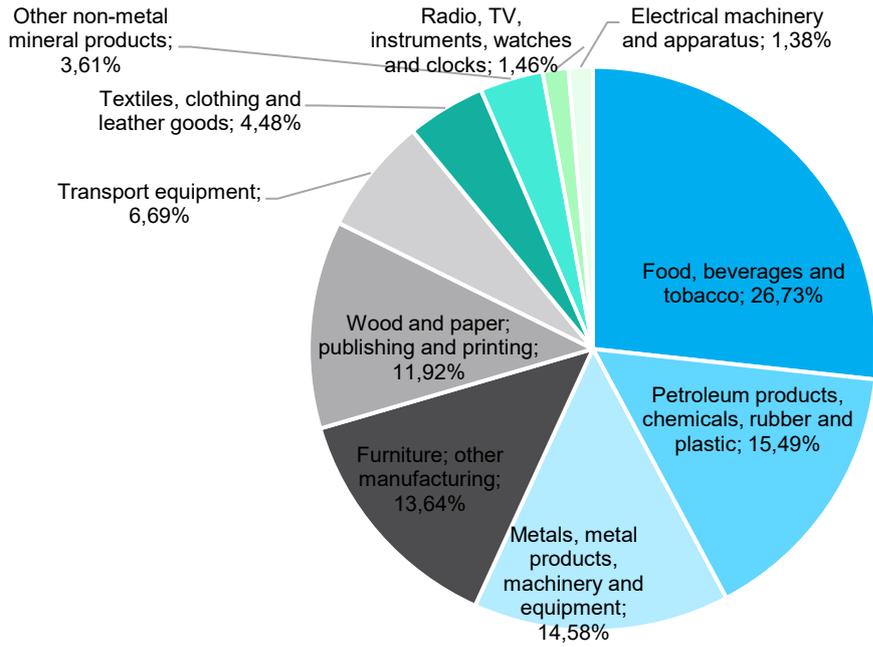
Source: Quantec, 2025. Author own calculations based on Quantec data

### Manufacturing sector breakdown

Figure 12 demonstrates contributions from different manufacturing sub-sectors to the Garden Route district's (manufacturing) output in 2024. The top sub-sectors were:

- The food and beverages and tobacco sub-sector, which at a value of ZAR1.60bn was equivalent to a 26.73% share of manufacturing output
- The petroleum products, chemicals, rubber and plastic sub-sector with a contribution of ZAR926.40m, equivalent to a 15.49% share
- The metals, metal products, machinery and equipment sub-sector with a contribution of ZAR872.00m (14.58%).

Figure 12: Garden Route district: manufacturing sector breakdown, 2024



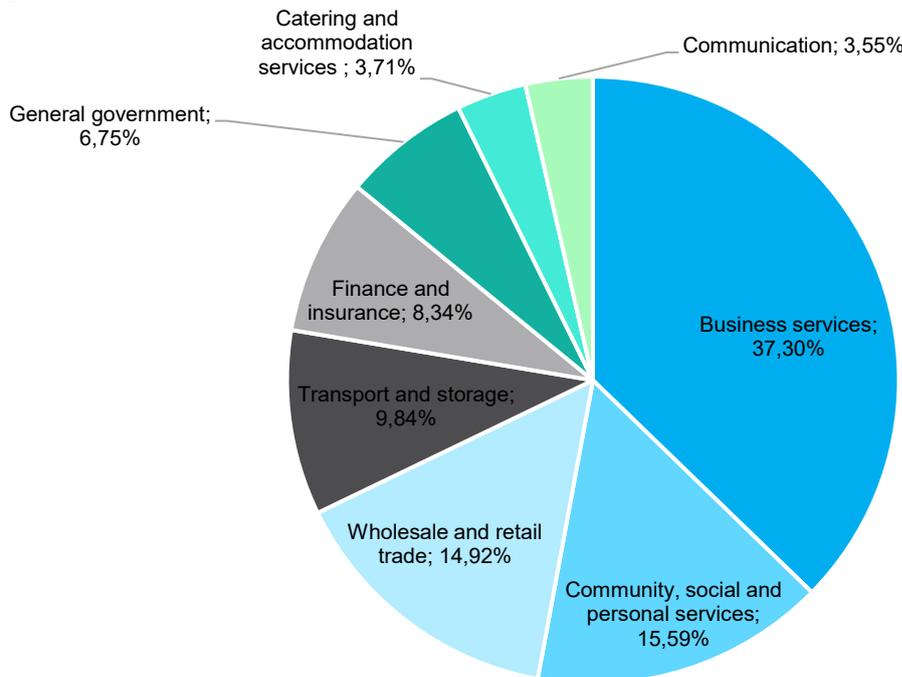
Source: Quantec, 2025. Author own calculations based on Quantec data

**Services sector breakdown**

Figure 13 gives the breakdown of the output from sub-sectors in the services sector in 2024. The largest contributory sub-sectors were:

- Business services at a value of ZAR13.02bn, equivalent to a 37.30% share
- Community, social and personal services at ZAR5.44bn (15.59%)
- Wholesale and retail trade at a value of ZAR5.21 bn (14.92%).

Figure 13: Services sub-sector breakdown, Garden Route district, 2024



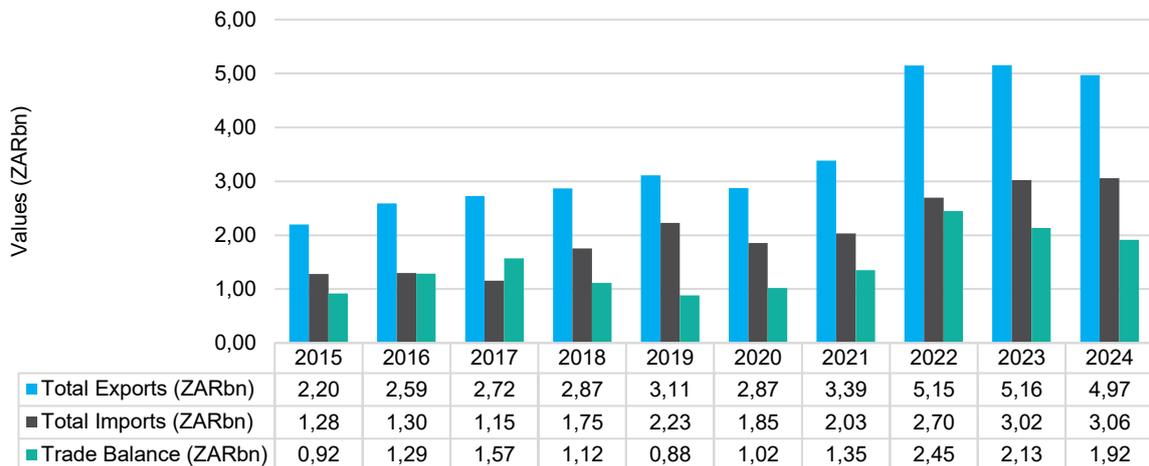
Source: Quantec, 2025. Author own calculations based on Quantec data

## 5. International Trade

In 2024, the Garden Route district exported goods valued at ZAR4.97bn. This represented a decline of –3.59% y-o-y, down from a value of ZAR5.16bn earned in 2023. Imports in turn reached a value of ZAR3.06bn in 2024, increasing by 1.08% y-o-y from a cost of ZAR3.02bn in 2023. These figures are shown in Figure 14.

On average, exports increased at an average annual growth rate of 11.76% and imports at a rate of 11.65% from 2015 to 2024.

Figure 14: Garden Route District's global trade flows, 2015–2024



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

Note: Values are in SA Rand (ZAR, current prices)

### 5.1 Key trade markets

The top ten destination markets for exports from the Garden Route district in 2024 are shown in Table 5. The United States was the top destination market for the district's exports in that year, accounting for a 18.74% share of total export earnings, valued at ZAR931.72m. The Netherlands (with exports valued at ZAR529.30m) and China (ZAR421.02m) were in second and third place respectively. Combined, the top 10 export markets accounted for 69% of district's total exports in 2024.

Among the top 10 markets, the fastest growing markets for the district's exports from 2020 to 2024, as measured by the highest average growth rate, were Zambia (with a growth rate of 36.44%), Italy (32.02%) and France (26.45%).

Table 5: Garden Route's top 10 export destination markets, 2020–2024

RANK	COUNTRY	VALUE 2024 (ZARm)	% SHARE, 2024	% AVE GROWTH, 2020-2024
1	United States	931.72	18.74%	24.73%
2	Netherlands	529.30	10.65%	24.70%
3	China	421.03	8.47%	6.75%
4	France	351.62	7.07%	26.45%
5	Italy	243.39	4.90%	32.02%
6	Namibia	236.84	4.76%	14.94%
7	Japan	203.58	4.09%	22.15%
8	United Kingdom	173.94	3.50%	19.26%
9	Kenya	171.20	3.44%	18.89%
10	Zambia	146.06	2.94%	36.44%
<b>TOTAL EXPORTS</b>		<b>4971.99</b>	<b>100.00%</b>	<b>11.78%</b>

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

The top source markets for imports to the Garden Route district in 2024 are listed in Table 6. China was the district's top import source market, accounting for 18.17% of total imports which cost ZAR555.09m. The United States (with imports of ZAR280.38m) and Italy (with imports costing ZAR205.10m) ranked second and third respectively. Combined, the top 10 markets accounted for 63% of district's total imports in 2024.

Among the top 10 markets, the fastest growing markets for the district's imports from 2020 to 2024, as measured by the highest average growth rate, were Botswana (with a growth rate of 277.30%), followed by Brazil (134.19%) and the United States (32.72%).

Table 6: Garden Route district's top 10 import source markets, 2020–2024

RANK	COUNTRY	VALUE 2024 (ZARm)	% SHARE, 2024	% AVE GROWTH, 2020–2024
1	China	555.09	18.17%	0.25%
2	United States	280.38	9.18%	32.72%
3	Italy	205.10	6.71%	13.90%
4	Germany	177.69	5.82%	27.72%
5	Australia	136.87	4.48%	18.45%
6	Botswana	132.49	4.34%	277.30%
7	Brazil	119.92	3.92%	134.19%
8	Namibia	110.94	3.63%	2.87%
9	United Kingdom	109.00	3.57%	26.53%
10	Netherlands	104.88	3.43%	20.16%
<b>TOTAL EXPORTS</b>		<b>3055.57</b>	<b>100.00%</b>	<b>7.75%</b>

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

## 5.2 Key trade products

The top ten exported products from the Garden Route in 2024 are shown Table 7. Seeds, fruit and spores, of a kind used for sowing, was the top export category from the district in 2024. Valued at ZAR1.02bn, these exports accounted for 20.57% of the total export basket from the district. The export product of leather further prepared after tanning or crusting, including parchment-dressed leather was valued at ZAR681.49m; while in third place was the export product of skins and other parts of birds with their feathers or down, feathers, parts of feathers, valued at ZAR420.98m. Combined, the top 10 export products accounted for 64% of total exports from the district in 2024.

Among the top 10 export products, the fastest growing categories in the past five years (2020–2024), as measured by the highest average growth rate were yachts and other vessels for pleasure or sports; rowing boats and canoes (with a growth rate of 220.31%); seeds, fruit and spores, of a kind used for sowing (with a growth rate of 27.56%); and motor cars and other motor vehicles principally designed for the transport of persons (with a growth rate of 16.05%).

Table 7: Garden Route district's top 10 export products, 2020–2024

RANK	PRODUCT	VALUE (ZARm), 2024	% SHARE, 2024	AVE GROWTH %, 2020–2024
1	Seeds, fruit and spores, of a kind used for sowing	1022.57	20.57%	27.56%
2	Leather further prepared after tanning or crusting, including parchment-dressed leather	681.49	13.71%	14.82%
3	Skins and other parts of birds with their feathers or down, feathers, parts of feathers	420.98	8.47%	15.47%
4	Yachts and other vessels for pleasure or sports; rowing boats and canoes	271.59	5.46%	220.31%
5	Citrus fruit	216.50	4.35%	-8.68%
6	Pumice stone; emery; natural corundum, natural garnet and other natural abrasives	140.62	2.83%	-
7	Insecticides, rodenticides, fungicides, herbicides, anti-sprouting products and plant-growth regulators, disinfectants	123.69	2.49%	6.32%
8	Other prepared or preserved meat, meat offal or blood	100.12	2.01%	10.90%
9	Motor cars and other motor vehicles principally designed for the transport of persons	98.90	1.99%	16.05%
10	Apples, pears and quinces	92.87	1.87%	13.46%
<b>TOTAL EXPORTS</b>		<b>4971.99</b>	<b>100.00%</b>	<b>11.78%</b>

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

Looking at imports, the top import category in the Garden Route district in 2024 was optical fibres and optical fibre bundles; optical fibre cables. At a value of ZAR132.47m, this import product accounted for 4.34% of the total import costs. This was followed by coffee, coffee husks and skins (at a cost of ZAR131.95m); and coal, briquettes, ovoids (ZAR131.32m) in second and third place. Combined, the top 10 import products accounted for 36% of the 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 coal, briquettes, ovoids (with a growth rate of 4374.39%); coffee; coffee husks and skins (197.99%); and human blood; animal blood prepared for therapeutic use (105.40%). This is illustrated in Table 8.

Table 8: Garden Route district's top 10 import products, 2020–2024

RANK	PRODUCT	VALUE (ZARm), 2024	% SHARE, 2024	AVE GROWTH %, 2020–2024
1	Optical fibres and optical fibre bundles; optical fibre cables	132.47	4.34%	5.38%
2	Coffee; coffee husks and skins	131.95	4.32%	197.99%
3	Coal; briquettes, ovoids	131.32	4.30%	4374.39%
4	Telephone sets, including telephones for cellular networks	129.63	4.24%	39.84%
5	Trunks, suitcases, vanity-cases, executive-cases, briefcases	116.19	3.80%	2.56%
6	Human blood: animal blood prepared for therapeutic	111.56	3.65%	105.40%
7	Automatic data processing machines and units thereof	94.62	3.10%	59.64%
8	T-shirts, singlets and other vests	88.62	2.90%	6.47%
9	Hydrazine and hydroxylamine and their inorganic salts; other inorganic bases	88.50	2.90%	17.73%
10	Aircraft and spacecraft; propellers and rotors and parts thereof	83.26	2.72%	-
<b>TOTAL IMPORTS</b>		<b>3055.57</b>	<b>100.00%</b>	<b>7.75%</b>

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

## 6. Investments

### 6.1 Foreign Direct Investment

Table 9 gives details of FDI in the Garden Route from January 2015 to September 2025. Four multinational companies invested in four FDI projects during this period. These projects had a cumulative capital investment (capex) of ZAR274.59m and led to the creation of 73 jobs.

Table 9: FDI in the Garden Route district, January 2015–June 2024

DATE	INVESTING COMPANY	SOURCE COUNTRY	DESTINATION CITY	INDUSTRY SECTOR	BUSINESS ACTIVITY	CAPEX (ZARm)	JOBS
Jul-23	International Workplace Group (Regus)	Switzerland	George	Real estate	Business Services	29.15	8
Nov-19	Klinger South Africa	Austria	Mossel Bay	Industrial equipment	Sales, Marketing & Support	42.95	12
Jun-18	Nestle South Africa	Switzerland	Mossel Bay	Food & Beverages	Manufacturing	19.94	1
May-17	DuPont	United States	Hoogekrall	Food & Beverages	Research & Development	182.55	52
<b>TOTAL</b>						<b>274.59</b>	<b>73</b>

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

### 6.2 Sector opportunities and initiatives in the Garden Route district

The Garden Route district's competitive advantages include its coastal line, with opportunities in ocean economy; coastal tourism; large forestry; agriculture and farming; and effective natural resources.

The district municipality is pursuing projects that include the establishment of a development agency, bulk infrastructure provision, products value chain development, renewable energy, enterprise development, integrated waste management and other projects.

The agency *Invest in Garden Route* provides information on sector opportunities identified in the region, which includes investment projects that are underway. These links lead to the website:

- [Renewable energy](#)
- [Agro-processing and food security projects](#)
- [Garden Route Special Economic Zone \(SEZ\)](#)
- [ICT](#)
- [Manufacturing \(the marine and aviation manufacturing Project\)](#)
- [Property development projects](#)
- [Skills development and training](#)
- [Sustainable water and sanitation](#)
- [Tourism](#)
- [Transport](#)

#### Comparative advantage

The Western Cape government's Municipal Economic Review & Outlook (MERO)<sup>1</sup> identifies comparative advantages in sectors in the Garden Route.

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

<sup>1</sup> Western Cape Government. (2024). Municipal Economic Review and Outlook 2024-25: Garden Route District. Cape Town: Western Cape Government. Available at: <https://www.westerncape.gov.za/treasury/files/wcq-blob-files?file=2025-04/mero-2024-garden-route.pdf&type=file> [Accessed: 30 November 2025].

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 (in Table 10) shows that the Garden Route district has an advantage in these sectors: agriculture, forestry and fishing; mining and quarrying; construction; wholesale and retail trade, catering and accommodation; and finance insurance, real estate and business services. Agriculture’s high location quotient underscores the region’s specialisation in farming activities which is supported by the district’s fertile soil and favourable climate resulting in a significant contribution to local food production and export markets.

Also, there are several emerging industries in the district. These include renewable energy, information technology, eco-tourism, and creative arts. Growth in the renewables sub-sector reflects the region’s commitment to sustainable development and its potential for harnessing wind, solar, and biomass resources to meet energy demands while reducing environmental impact. There is also an increase in the presence of tech startups and digital enterprises. Eco-tourism takes advantage of the region’s unique natural attractions and its appeal to environmentally conscious travellers seeking sustainable and immersive experiences. The creative arts sector is benefitting from a growth in focus on the district’s cultural heritage and the community of artists, designers, and performers.

Table 10: Location quotient in terms of GVA, Garden Route District, 2023

	Location quotient relative to Province	Gross value added at basic prices
Agriculture, forestry and fishing	1.31	5.6%
Mining and quarrying	1.30	0.2%
Manufacturing	0.94	13.2%
Electricity gas and water	1.06	2.0%
Construction	1.08	4.0%
Wholesale and retail trade catering and accommodation	1.06	14.3%
Transport, storage and communication	0.94	10.5%
Finance, insurance, real estate and business services	1.02	34.1%
General government	0.88	5.2%
Community, social and personal services	0.93	11.0%

Source: Adapted from Western Cape Government Municipal Economic Review and Outlook 2024-25: Garden Route District

### 6.3 Companies in the Garden Route district

Some of the companies based in the Garden Route are listed in Table 11:

Table 11: Selected companies in the Garden Route district

Company	Size Classification	City	Industry/Sector
BADGER HOLDINGS (PTY) LTD	Large Enterprise	George	Insurance And Pension Funding, Except Compulsory Social Security
CAW MEUBILEERDERS (PTY) LTD	Medium Enterprise	George	Retail Trade, Except of Motor Vehicles And Motorcycles; Repair of Personal Household Goods
DWR HERTZOG	Medium Enterprise	George	Manufacture: Food Products & Beverages
EAGLE ROOF TILES (PTY) LTD	Medium Enterprise	George	Manufacture: Other Non-Metallic Mineral Products
FRONTIERCO (PTY) LTD	Large Enterprise	George	Retail Trade, Except of Motor Vehicles and Motorcycles; Repair of Personal Household Goods
MARGOT SWISS PROPERTIES (PTY) LTD	Medium Enterprise	George	Wholesale & Commission Trade, Except of Motor Vehicle and Motorcycles
PLATTNER GOLF (PTY) LTD	Large Enterprise	George	Hotels & Restaurants
SAFARI VERVAARDIGING CC	Medium Enterprise	George	Wholesale & Commission Trade, Except of Motor Vehicle and Motorcycles
TEKKIE TOWN (PTY) LTD	Large Enterprise	George	Retail Trade, Except of Motor Vehicles and Motorcycles; Repair of Personal Household Goods
WATSONS BACONERIES (PTY) LTD	Medium Enterprise	George	Manufacture: Food Products & Beverages
AFRO FISHING (PTY) LTD	Large Enterprise	Mossel Bay	Fishing, Operation of Fish Hatcheries and Fish Farms
CAPEKAROO INTERNATIONAL (PTY) LTD	Large Enterprise	Mossel Bay	Manufacture: Food Products & Beverages
RHEEBOK BRICK OPERATIONS (PTY) LTD	Medium Enterprise	Mossel Bay	Manufacture: Other Non-Metallic Mineral Products
GEELHOUTVLEI TIMBERS CC	Medium Enterprise	Knysna	Manufacture: Wood & Wood Products, Paper, Printing and Publishing
KNYSNA YACHT COMPANY (PTY) LTD	Medium Enterprise	Knysna	Manufacture: Transportation Equipment
DENRON QUARRIES (PTY) LTD	Medium Enterprise	Plettenberg Bay	Other Mining & Quarrying
OLD NICK FABRICS (PTY) LTD	Medium Enterprise	Plettenberg Bay	Manufacture: Textiles, Clothing & Leather
LADISMITH CHEESE COMPANY (PTY) LTD	Large Enterprise	Ladismith	Manufacture: Food Products & Beverages
KLEIN KAROO (PTY) LTD	Large Enterprise	Oudtshoorn	Activities of Membership Organisations NEC
KLEIN KAROO AGRI (PTY) LTD	Medium Enterprise	Oudtshoorn	Activities of Membership Organisations NEC
KLEIN KAROO INTERNATIONAL (PTY) LTD	Large Enterprise	Oudtshoorn	Financial Intermediation, Except Insurance & Pension Funding

Source: *Who Owns Whom, 2025*

## 7. Tourism

This section provides an overview of the tourism trends and patterns in the Garden Route and Klein Karoo district. This includes the sample size, length of stay, as well as the origin of both domestic and international tourists who visit the district.

The statistics discussed in this section are from mobile location data insights.

### What is mobile location data?

- This is geo or spatial data from smartphones. When a user installs an app, they are often asked to share their location data with the company which provides the app, and other companies who are partners with the app publisher.
- Users can “opt in” to location sharing (or choose not to “opt in”). When they opt in, then their phone collects data and shares it with the publisher companies.
- All data collected is anonymised and does not include any personally identifiable information.

### Why use mobile location data insights?

- Mobile location-based data offers a more granular lens on visitor behaviour and provides a much larger sample size.
- These insights aim to facilitate a better understanding of visitor movement throughout the Western Cape’s six regions.
- Mobile location data serves as a sample. It does not represent 100% of visitors, and it should not be treated as such. Like any sampling method, it can be subject to biases or lack of volume.

### Factors influencing the International and Domestic Sample Counts:

**The volume of mobile location data capture counts is influenced by several factors including but not limited to:**

#### Data Source Variability

- Changing volume of mobile applications collecting and sharing data
- Data privacy and regulatory changes affecting sharing of data (GDPR, mobile OS policy changes etc.)

#### Data Collection and Processing Variability

- Mobile network and internet connectivity
- Mobile infrastructure technical issues (hardware failures, solar flare activity)
- Tourists’ logic in separating tourist from non-tourist mobile devices

#### Mobile Use Variability

- Tourists disabling data transmission services due to high international data costs
- Tourists not using partnership apps as often.

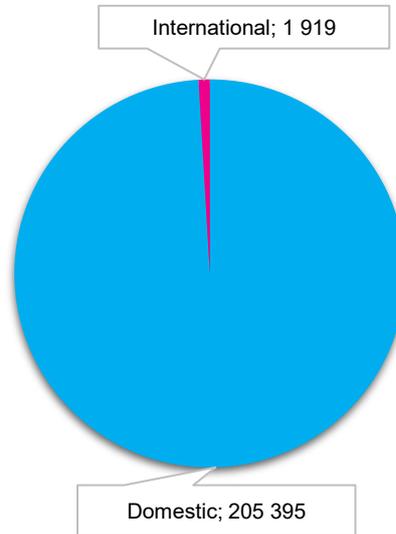
*While all mobile devices are affected by the above, international mobile device counts are affected more than domestic mobile devices when it comes to both fluctuations in mobile use and data privacy restrictions. Tourists use their phones differently when travelling internationally – they may want to avoid additional out of country fees and only use their phone through wi-fi services. Tourists might not use the partnership apps they normally do while on extensive holidays. Restrictive data privacy laws are also affecting the international landscape as these have an impact on data that can be shared. This may affect processing that identifies tourists.*

Source: ROVE, 2024

## 7.1 Garden Route and Klein Karoo mobile location data insights

The insights for this section were analysed from a sample of 205,395 domestic and 1,919 international tourists who visited the Garden Route & Klein Karoo between January and December 2024, as seen in Figure 15.

Figure 15: Sample size of domestic and international visitors to the Garden Route & Karoo district, Jan–Dec 2024



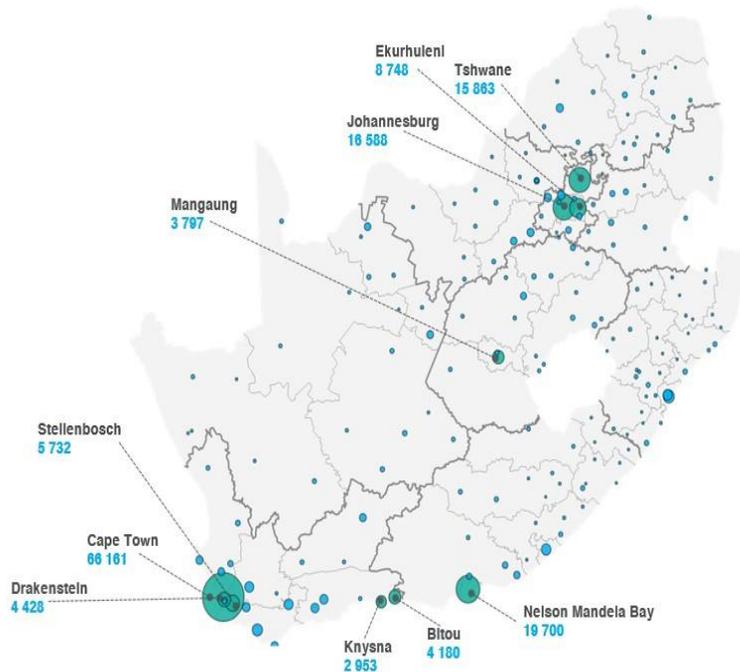
Source: ROVE, 2024

## 7.2 Origin of domestic tourists

South Africa is divided into nine provinces, and mobile location insights show that the majority of visitors to the Western Cape originate from four of these provinces.

Cape Town accounted for the largest share with 66,161 visitors. This was followed by Nelson Mandela Bay with 19,700 visitors and Johannesburg with 16,588 visitors, as illustrated in Figure 16.

Figure 16: Municipalities of origin for domestic tourists in the Garden Route & Klein Karoo, Jan–Dec 2024



Source: ROVE, 2024

### 7.3 Origin of international tourists

The top ten source countries for international visitors to the region are presented in Figure 17. From a sample size of 1,919 international visitors, the United States accounted for 24.7% of these visitors; Brazil for 18.4%; Mexico for 3.8%, and Canada for 3.0%.

These four countries collectively contributed to 49.9% of arrivals in the Garden Route and Klein Karoo. International visitors from the Middle East came from the United Arab Emirates (5.0%) and Saudi Arabia (1.4%).

Figure 17: Countries of origin for international tourists visiting the Garden Route & Klein Karoo, Jan–Dec 2024

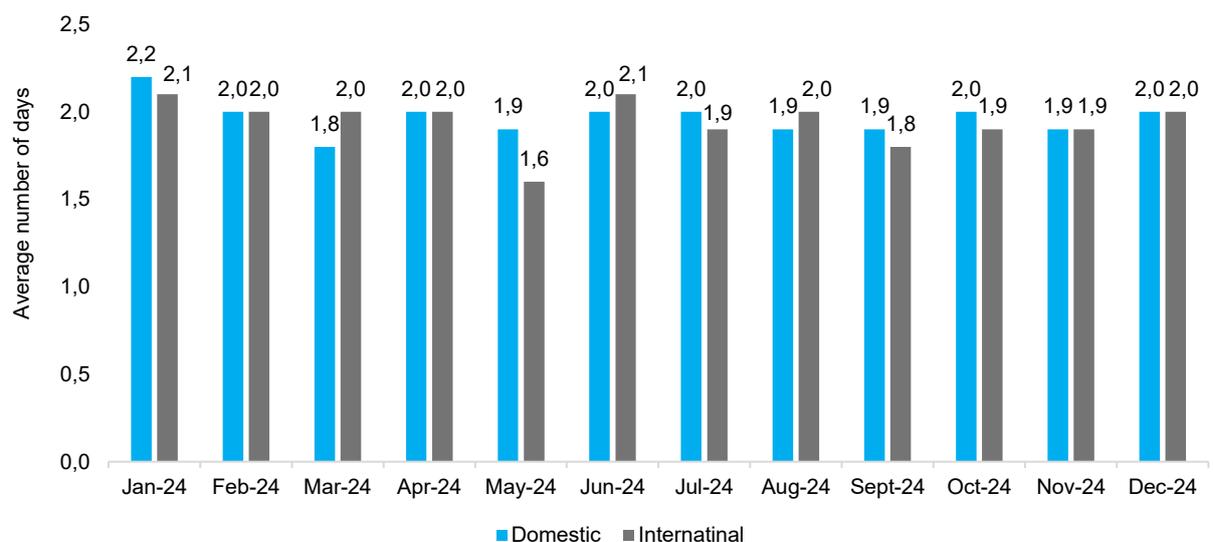


Source: ROVE, 2024

### 7.4 Average length of stay

Figure 18 illustrates tourists' average length of stay in the Garden Route & Klein Karoo during the different months in 2024. On average, domestic tourists stayed between 1.8 to 2.2 days, while international tourists stayed on average for 1.6 to 2.1 days. Travel times and months differed for domestic and international tourists. This can also be seen in Figure 18.

Figure 18: Average length of stay in the region, Jan–Dec 2024



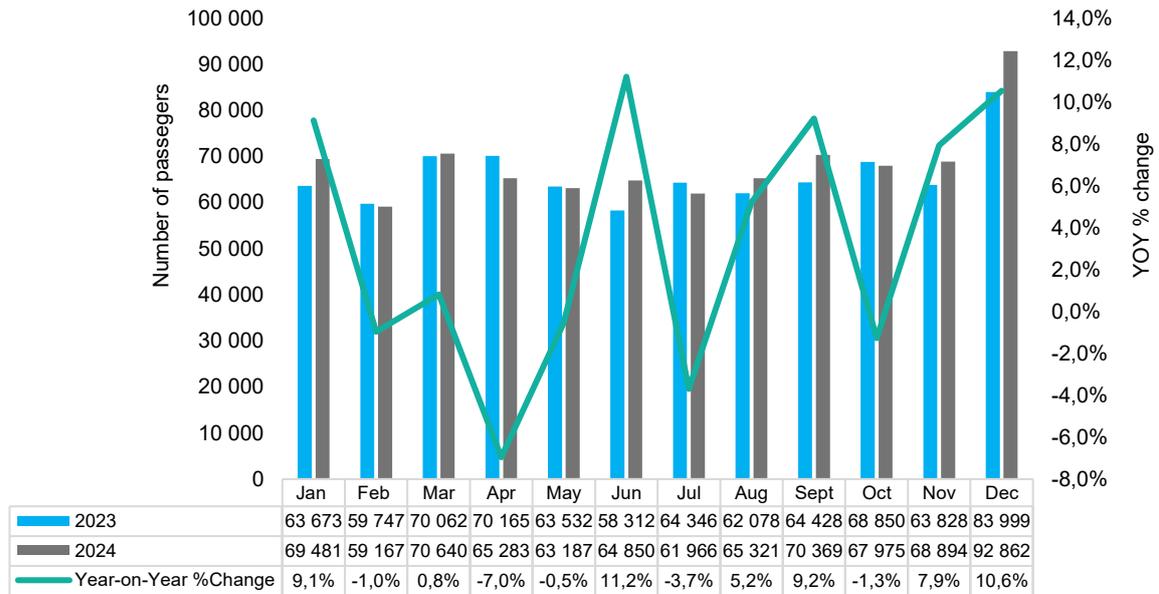
Source: ROVE, 2024

## 7.5 Passenger movement through George Airport

In 2024, George airport recorded a total of 819,995 arrivals and departures, reflecting a 3.4% y-o-y increase compared to 2023. The growing popularity of the region as a tourist destination has contributed significantly to this positive trend, as illustrated in Figure 19.

The busiest months for travel were March with 70,640 arrivals, and September with 70,369 passenger arrivals. Airlink, CemAir and FlySafair are the only commercial airlines with direct inbound routes to George. Routes are from Cape Town, Johannesburg, Bloemfontein, and Durban (George Tourism, 2025).

Figure 19: Two-way passenger movement through George airport, Jan–Dec 2024



Source: Airports Company South Africa, 2024

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