

Overberg

November 2022

Executive Summary

This destination fact sheet provides key trade- and investment-related statistics for the Overberg district. Specifically, it shows trends in the Overberg area relating to employment and to global trade and investment. The key highlights are:

Economy

- The Overberg district's gross domestic product (GDP) grew by 6.15% from ZAR42.98bn in 2020 to ZAR45.62bn in 2021.
- The Theewaterskloof municipality made the largest contribution of ZAR19.48m to the Overberg district's GDP in 2021.
- The wholesale and retail trade, catering and accommodation sector was the largest employer in the Overberg district in 2021, employing 25,622 people.
- The finance, insurance, real estate, and business services sector contributed the most to the Overberg district's GDP, accounting for 26.82% of economic output in 2021.
- The construction sub-sector was the largest contributor to the Overberg manufacturing sector in 2021, with a market share of 37.86%.
- The business services sub-sector made the biggest contribution (38.98%) to the Overberg services sector.

Trade

- Over the past decade (2012–2022), the Overberg district was a net exporter of goods. In 2021, the region exported goods to the value of ZAR3.43bn compared to the value of ZAR3.07bn in 2020, representing a 11.71% growth.
- The Netherlands was the largest destination market for exports from the Overberg district at a value of ZAR489.92m, equivalent to 14.27% of total exports in 2021.
- The leading source market for imports to the Overberg district was China at an associated cost of ZAR308.00m, equivalent to 19.28% of total imports in 2021.
- With export earnings of ZAR695.52m, apples, pears and quinces were the leading export product from the Overberg in 2021, accounting for 20.26% of total exports. Molluscs and wine ranked second and third, accounting for 11.16% (ZAR383.07m), and 9.35% (ZAR320.81m) of total export earnings.

Investment

- According to Foreign Direct Investment (FDI) Intelligence, the Overberg district attracted one FDI project valued at ZAR79.80m between January 2003 and July 2021. This resulted in the creation of 17 jobs.

Tourism

- The top five international markets visiting the Overberg district in 2021 were Germany (33.61%), the United Kingdom (23.61%), France (7.50%), the Netherlands (5.74%) and the United States (5.70%).
- The Western Cape (88.30%) continued to lead as the dominant domestic source market for the Overberg. The region is very popular among local Western Cape travellers, largely due to its proximity to Cape Town. Gauteng and KwaZulu-Natal ranked second and third in providing domestic travellers to the region.

1. Area

The greater Western Cape provincial economy comprises the Cape Metro – often referred to as the City of Cape Town – and five district municipalities. These five districts (shown in Figure 1) are the Cape Winelands, Central Karoo, Garden Route, Overberg, and West Coast. Together with the Cape Metro, they collectively represent and account for the Western Cape’s provincial economy.

The Overberg district, which is known for its coastline and vast farmlands, has four local municipalities with major towns and cities that include: Agulhas, Arniston, Barrydale, Betty’s Bay, Birkenhead, Bot River, Bredasdorp, Buffeljagsrivier, Caledon/Myddleton, De Kelders, Elim, Fishershaven, Franskraal, Gans Bay, Genadendal, Grabow, Greyton, Hawston, Hermanus, Infanta, Kleinmond, Klipdale, Malgas, Napier, Onrus, Pearly Beach, Pringle Bay, Protem, Riviersonderend, Rooi-Els, Sand Bay, Stanford, Struis Bay, Suiderstrand, Suurbraak, Swellendam, Theewaterskloof, Van Dyks Bay, Vermont and Villiersdorp.

Figure 1: Districts in the Western Cape, 2022



Source: Overberg District Municipality, 2022

The Overberg District Municipality (ODM) is situated in the south of the Western Cape and borders the Indian and Atlantic oceans to the south, and Cape Town, the Cape Winelands, and Eden to the west, north and east respectively. The district consists of four local municipalities (Category B Municipalities), namely Theewaterskloof, Overstrand, Cape Agulhas and Swellendam, as shown in Figure 2.

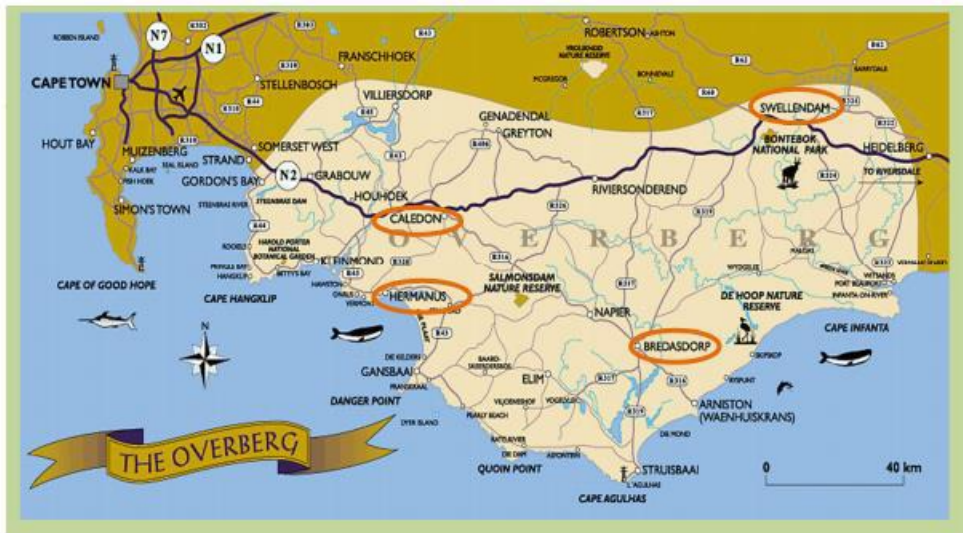
Figure 2: Overberg District Municipality, 2022



Source: Overberg District Municipality, 2022

With its size of 12,241km², the Overberg district is the second smallest of the six districts in the Western Cape. A map of the district is represented Figure 3.

Figure 3: Overberg map, 2022



Source: Overberg District Municipality, 2022

The ODM is classified as a 'Category C' municipality and functions in a legislative framework, with its head office in Bredasdorp and four regional offices in the four local municipal areas, which are detailed below.

Theewaterskloof Local Municipality with its headquarters in Caledon includes Genadendal, Grabouw, Villiersdorp, Greyton, Bot River and Riviersonderend. Agricultural activities include wheat production, stock farming and fruit production.

Overstrand Local Municipality with its headquarters in Hermanus includes Baardskeerderbos, Pearly Beach, Franskraal, Kleinbaai, Gansbaai, De Kelders, Stanford, Sandbaai, Onrus, Vermont, Hawston, Kleinmond, Betty's Bay, Hangklip, Pringle Bay and Rooi Els. The area is mainly known as a tourism and holiday destination and is well known for its small fishing communities.

Cape Agulhas Municipality with its headquarters in Bredasdorp includes Arniston (Waenhuiskrans), Struisbaai, Suiderstrand, Napier and Elim. Agricultural activities include wheat production, stock farming and small fishing communities. The area is also known as a holiday destination with the southernmost point at L'Agulhas.

Swellendam Local Municipality with its headquarters in Bredasdorp in Swellendam includes Suurbrak, Buffeljagsriver, Infanta and Barrydale. Agricultural activities include fruit, wheat, barley, young berry, livestock, dairy farming, grapes for export and wine making. Other sectors are retail and manufacturing, mining, and quarrying. Swellendam is also known as tourist destination

Source: Overberg District Municipality Draft Annual Report 2021/22

2. General Information

Table 1 shows the key indicators for the Overberg district.

Table 1: Overberg District Municipality general information, 2021

KEY INDICATORS – OVERBERG DISTRICT MUNICIPALITY	
Executive Mayor	Alderman Andries E Franken
Population (2021)	305,529
Human Development Index (HDI) 2022	0.762
GDP (2021)	ZAR45,624.26m
GDP Growth (2021)	6.15%
Unemployment (2021)	22,154 (16%)
Literacy rate (2022)	59%
Ethnic groups (2022)	Black (29.86%), Coloured (54.87%), Indian & Asian (0.29%), White (14.97%)
Languages	Afrikaans (68%); isiXhosa (21%); English (6%); Sesotho (2%); Other (3.1%).
Gini Coefficient (2020)	0.608

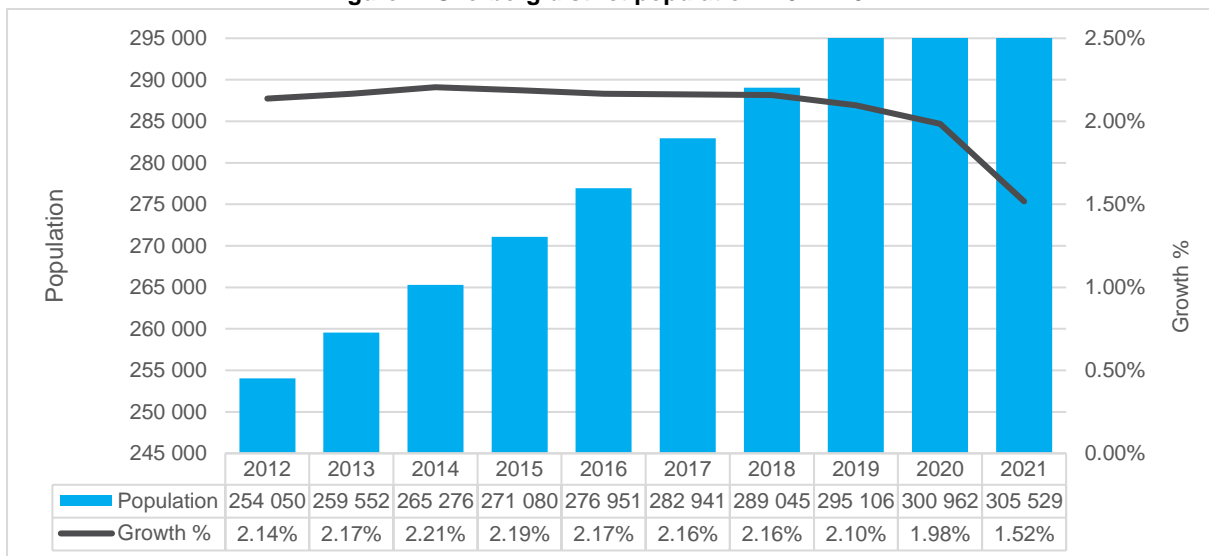
Source: Overberg District Municipality; Quantec, 2022

2.1. Demographics

The Overberg district was home to approximately 305,529 people in 2021, making it the second smallest district population outside of the metro in the Western Cape province. The district accounted for 4.3% of the province's population in 2021, with the province's largest population in the City of Cape Town (4,648,567) and the smallest in the Central Karoo district (75,647).

In 2021, the Overberg district's population increased by 1.98%, from 300,962 people in 2020 to 305,529 in 2021, as shown in Figure 4. Overall, the population of the Overberg has been growing at an annual average rate of 2% over the past decade.

Figure 4: Overberg district population: 2012–2021



Source: Quantec, 2022

The population density of the Overberg district was 24.80 people per square kilometre in 2021, up from 24.42 in 2020, and 23.95 in 2019. These numbers show the growth in the district's population over the past three years. The region's population density was slightly less than half of the Western Cape's total average of 54.59 people per square kilometre in 2021. These figures are shown in Table 2.

Table 2: Population density per square kilometer in Western Cape municipal districts, 2021

Western Cape population density by municipal district, 2019–2021			
District	2019	2020	2021
City of Cape Town	1,834.03	1,870.53	1,901.28
Cape Winelands	42.73	43.50	44
Eden	26.39	26.66	27
Overberg	23.95	24.42	24.80
West Coast	14.46	14.72	14.94
Central Karoo	1.94	1.94	1.95
Western Cape, total	52.80	53.78	54.59

Source: Quantec, 2022

From a demographic perspective, Table 3 shows that the Coloured population dominates in the district, accounting for an estimated 54.39% of the total Overberg population in 2021, followed by Black Africans (30.88%), Whites (14.44%), and Indian or Asians (0.29%).

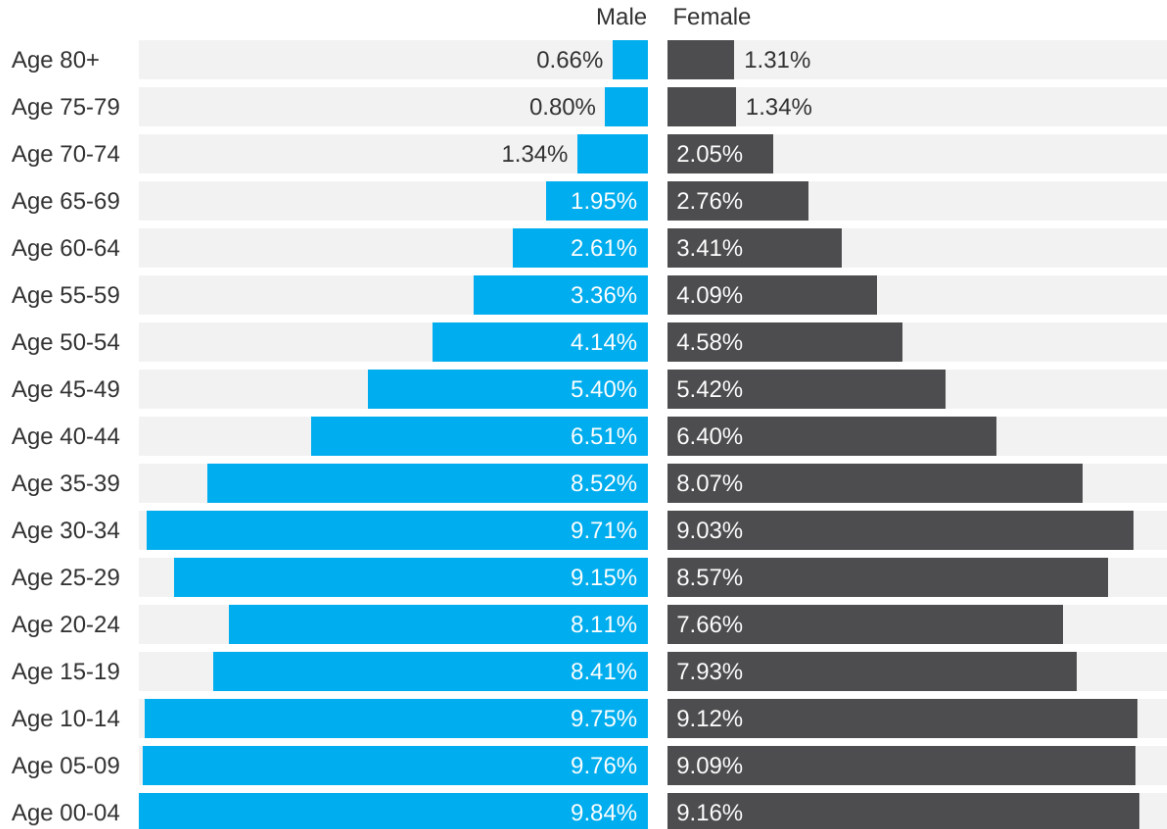
Table 3: Population breakdown by demographic group, 2020–2021

Population breakdown, by demographic group (2020–2021)				
Group	2020	2021	% Share 2021	2020 - 2021 change
Coloured	162,337	165,137	54.39%	1.72%
Black African	91,755	93,765	30.88%	2.19%
White	43,936	43,843	14.44%	-0.21%
Asian/Indian	850	875	0.29%	2.90%
TOTAL	298,878	303,619	100.00%	1.59%

Source: Quantec, 2022.

Figure 5 shows a tapering of population numbers in 2021 in the age groups 5–9 years, 10–14 years and 15–19 years. The highest number of people were between 0 to 04 years old, both males and females.

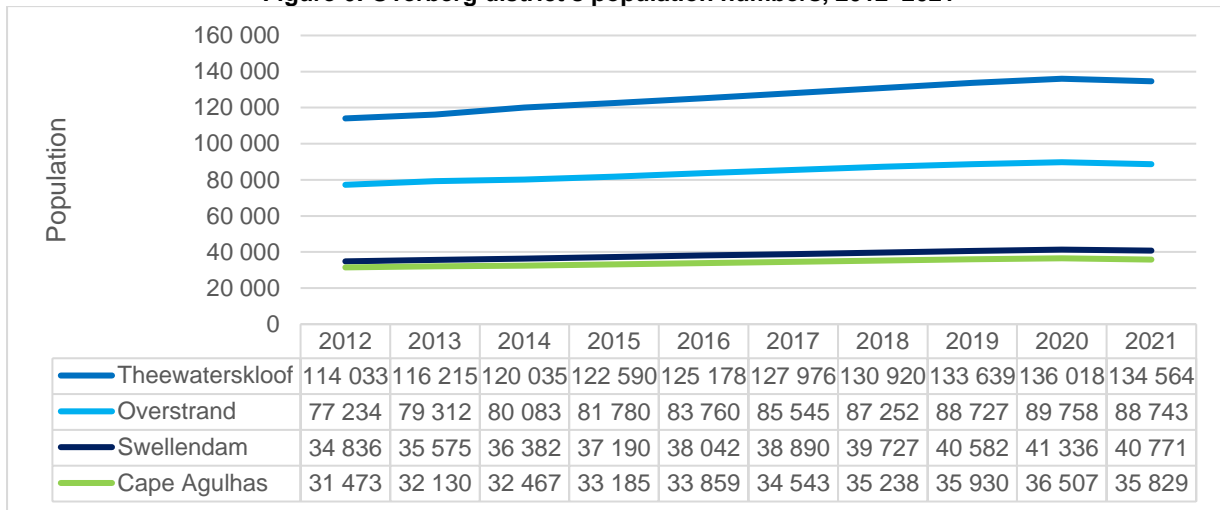
Figure 5: Overberg district's population distribution



Source: Quantec, 2022

Over the past decade, Theewaterskloof municipality had the largest population in the Overberg district, recording the highest average growth rate among the five municipalities over the past five years. This was closely followed by Overstrand, Swellendam and finally Cape Agulhas.

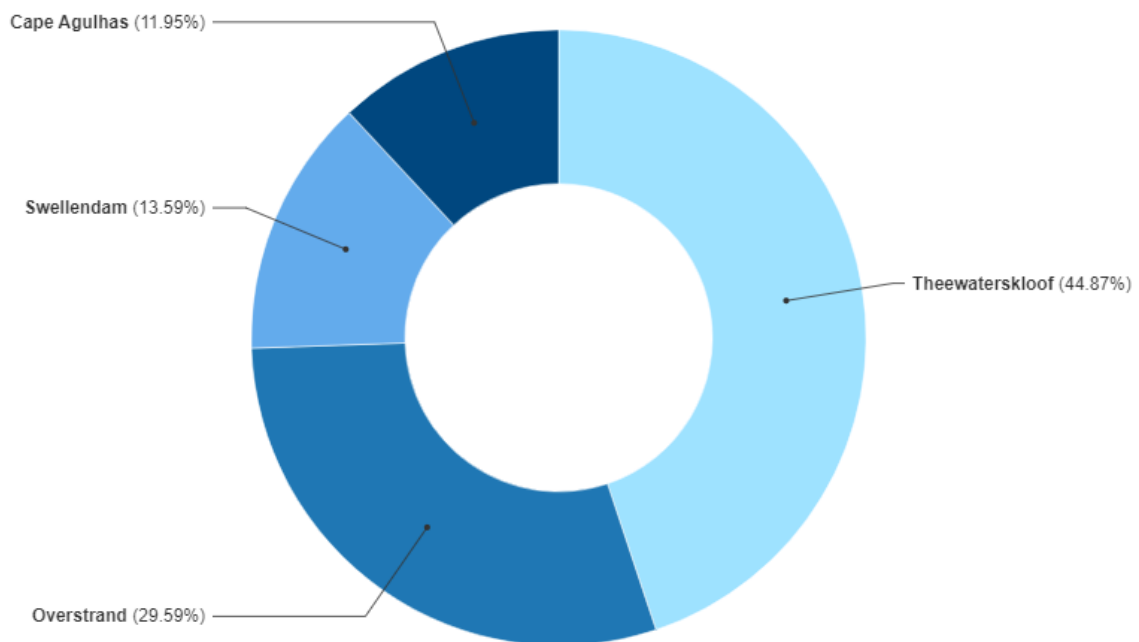
Figure 6: Overberg district's population numbers, 2012–2021



Source: Quantec, 2022

Figure 7 shows the sub-regional breakdown of the Overberg's population in 2021. The largest proportion of the population lived in Theewaterskloof (44.87%), followed by Overstrand (29.59%), Swellendam (13.59%) and Cape Agulhas (11.95%).

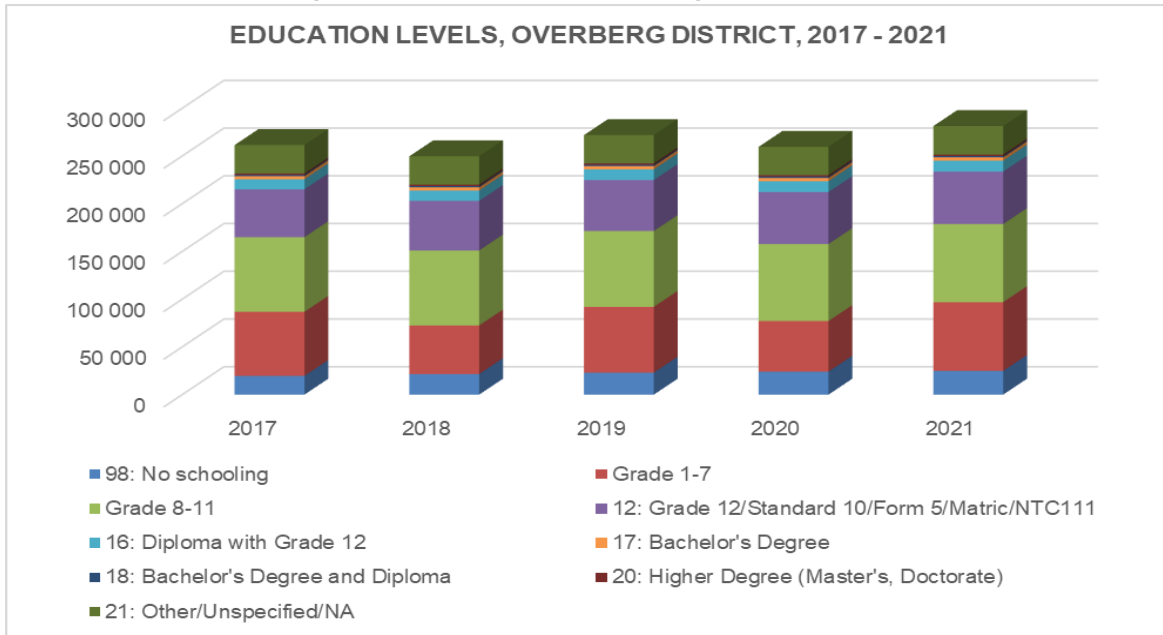
Figure 7: Sub-regional breakdown of the Overberg district's population, 2021



Source: Quantec, 2022

Levels of education in the greater Overberg district vary greatly. The graph in Figure 8 reflects the number of people who have different levels of education in the district. The largest number of people (81,866) have a qualification in the Grade 8–12 grouping, representing 27.39% of those with qualifications in 2021. The second largest number (72,039) was the Grade 1–7 grouping, representing 24.10% of those with qualifications in the same year.

Figure 8: Education levels, Overberg district, 2017–2021



Source: Quantec, 2022

3. Employment

Table 4 provides a snapshot of indicators for employment in the Overberg district in 2021. The working-age population numbered 204,373 people and some 116,796 were employed formally and informally, while 65,423 were not economically active. The labour force absorption rate was 57.04% and the unemployment rate in 2021 was 16.03%.

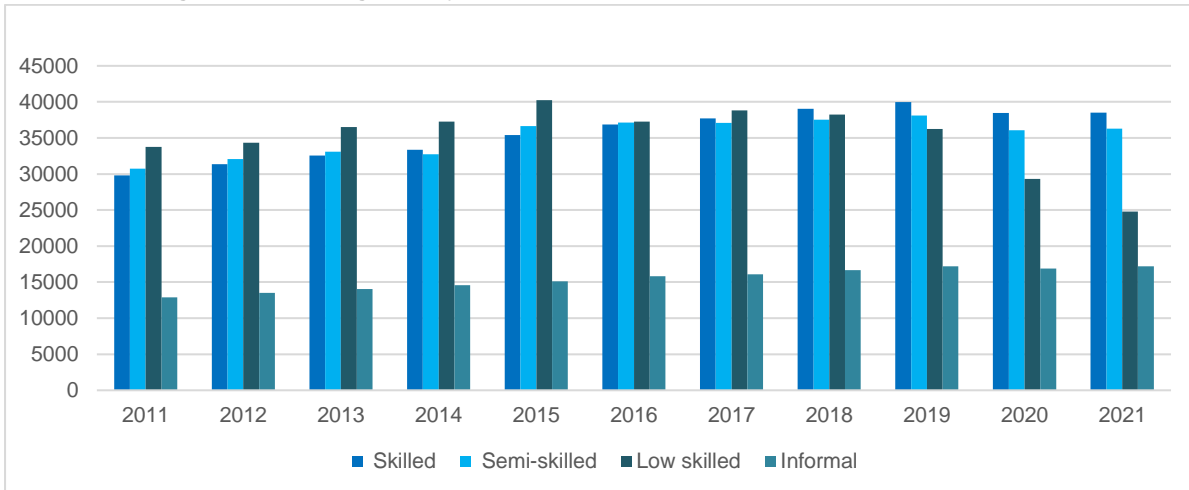
Table 4: Employment levels, Overberg district, 2021

Concept	2021
Population - Total (Number)	303,619
Population - Working age (Number)	204,373
Labour force / economically active (Number)	138,950
Employed - Formal and informal - Total (Number)	116,796
Employed - Formal - Total (Number)	91,987
Not economically active (Number)	65,423
Employed - Informal (Number)	24,809
Labour absorption rate / employment-to-population ratio (Percentage)	57
Unemployment rate (Percentage)	16

Source: Quantec, 2022

The graph in Figure 9 is representative of skills sets in the Overberg district's working population. In the formal employment category, the low-skilled grouping dominated throughout the period under review (2011–2021) apart from the years 2018–2021, during which time the skilled grouping were the strongest. The informal category followed in a very distant fourth place.

Figure 9: Overberg employment skills (number): formal vs informal, 2011 - 2021

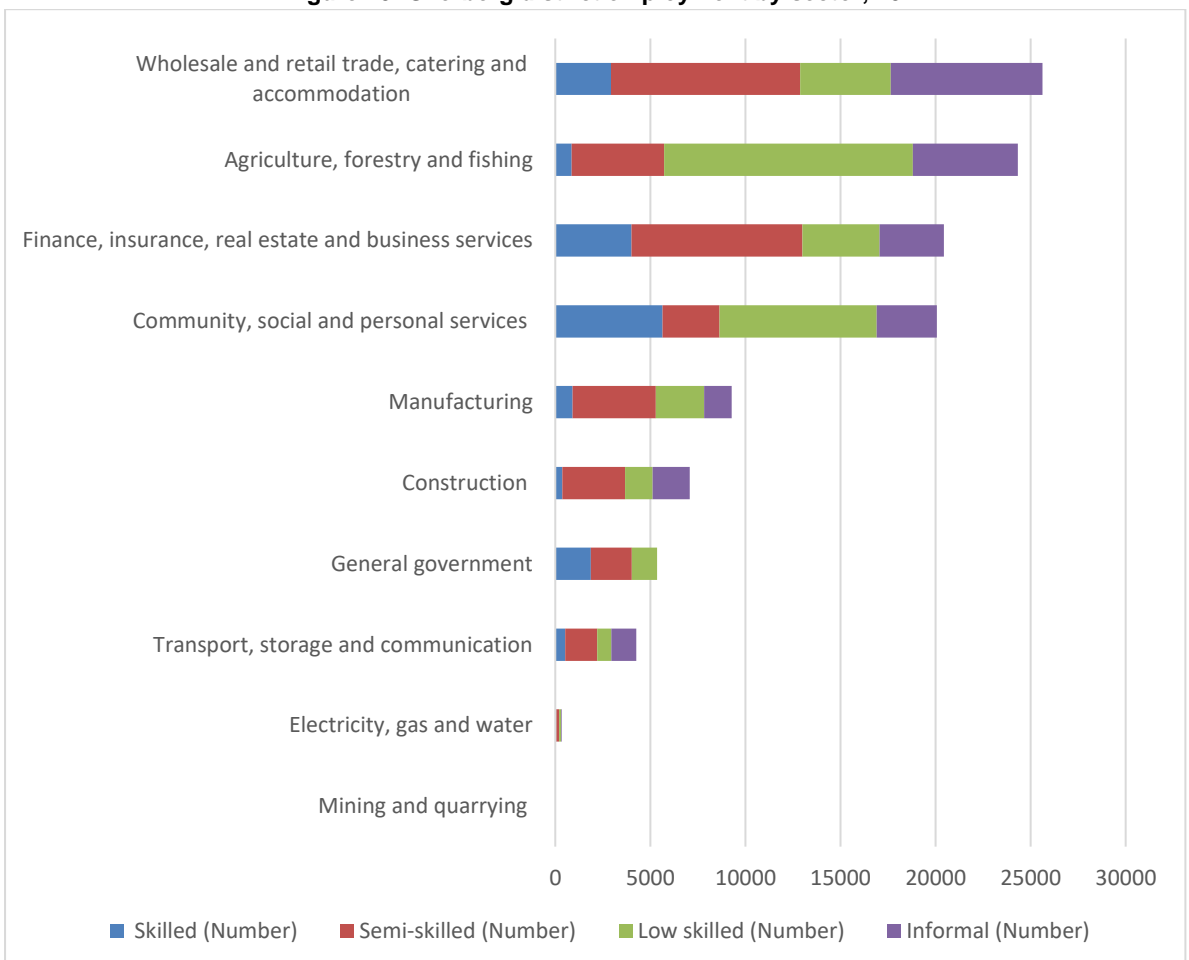


Source: Quantec, 2022

Figure 10 provides an overview of employment by economic sector in the Overberg district in 2021. In terms of total employment, the top sectors were wholesale and retail trade, followed by agriculture, forestry and fishing. These sectors collectively accounted for approximately 42.77% of the total number of people employed in 2021.

The industry with the highest number of skilled workers was the community, social and personal services, while wholesale and retail trade, catering and accommodation employed the most semi-skilled workers. The agriculture, forestry and fishing sector dominated with those that were lowly skilled and finally wholesale and retail trade constituted the highest number of people in the informal employment category.

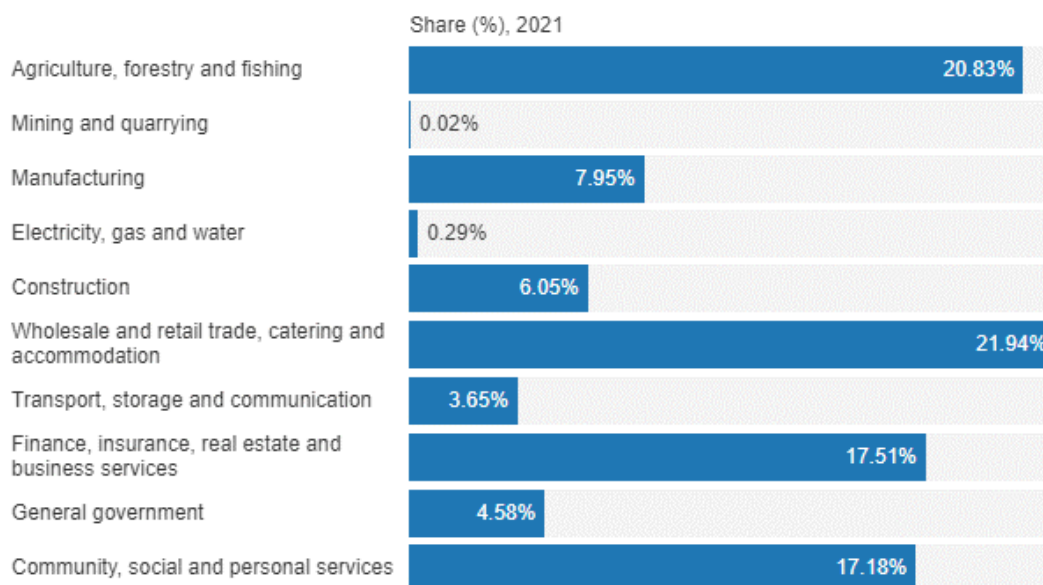
Figure 10: Overberg district employment by sector, 2021



Source: Quantec, 2022

The wholesale and retail trade, catering and accommodation sector was the largest contributor to employment in the Overberg in 2021, as shown in Figure 11. The sector accounted for 21.94% of total employment. The agriculture, forestry and fishing sector employed the second largest number of people (representing 20.83% of those employed) during the same period, whereas the mining and quarry industry made the lowest contribution to employment (0.02%).

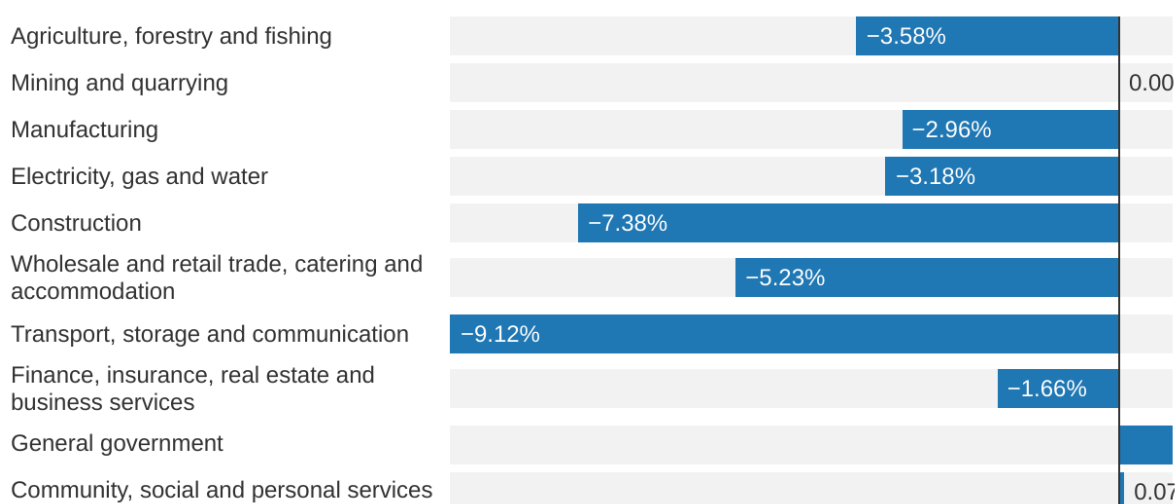
Figure 11: Share of employment by sector, 2021



Source: Quantec, 2022

Apart from the general government; community, social and personal services; and mining and quarrying, all the other sectors experienced a decline in employment rates between 2020 and 2021, as depicted in Figure 12. The biggest decline was in the transport, storage and communication industry, which was severely impacted by COVID-19. This sector recorded a 9.12% decline in employment in 2020–2021.

Figure 12: Changes in employment by sector, 2020–2021



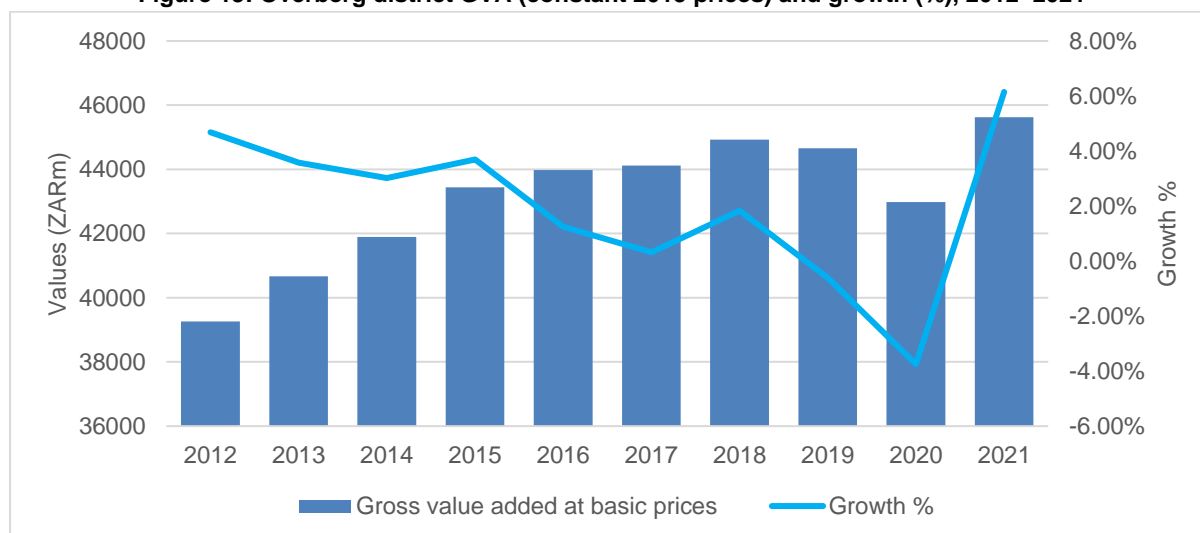
Source: Quantec, 2022

4. Economic Overview

The Overberg district is the fifth largest economy in the districts of the Western Cape. In 2021 the Overberg district contributed an estimated ZAR19.43bn as measured by gross value added (GVA) in ZAR billions constant 2015 prices. This represented a contribution of 3.37% to the Western Cape's economy.

In 2021, the Overberg district's economy grew by an estimated 6.15%, up from a 3.75% decline in 2020. The key contributing factor to the decline in growth in 2020 was the COVID-19 pandemic and national lockdowns, which restricted economic activity. However, with the easing of lockdown measures to somewhat pre-pandemic levels, an estimated ZAR45.62bn in GVA was recorded in 2021.

Figure 13: Overberg district GVA (constant 2015 prices) and growth (%), 2012–2021



Source: Quantec, 2022

Table 5 represents the Overberg district's GDP per sector between 2020 and 2021.

The finance, insurance, real estate, and business services sector was the largest contributor to GDP in this region in 2021, accounting for 26.82% of the GDP at a value of ZAR5.21bn. The sector grew by 4.60% between 2020 (ZAR4.98bn) and 2021 (ZAR5.21bn). The wholesale and retail trade, catering and accommodation sector was in second place, representing 16.24% of the region's GDP at a value of ZAR3.16bn, up by 7.84% from the 2020 value of ZAR2.93bn. The manufacturing sector ranked as the third largest contributor to the Overberg district's GDP, accounting for 13.38% (ZAR2.60bn) of the GDP, up by 8.90% from the 2020 value of ZAR2.39bn.

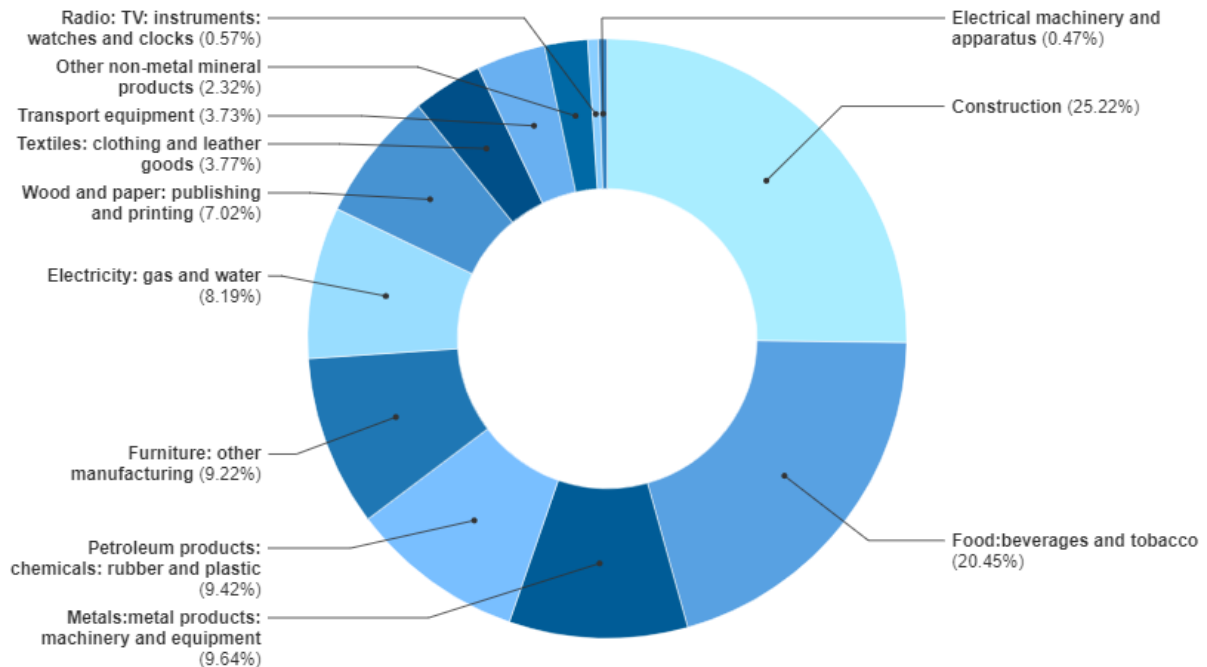
Table 5: Overberg district's GDP per sector, 2020–2021

Overberg's GDP per sector, 2020–2021				
Sector	Value 2020 (ZARbn)	Value 2021 (ZARbn)	% Share of GDP, 2021	Growth rate %, (2020-2021)
Finance, insurance, real estate, and business services	4.98	5.21	26.82%	4.60%
Wholesale and retail trade, catering, and accommodation	2.93	3.16	16.24%	7.84%
Manufacturing	2.39	2.60	13.38%	8.90%
Agriculture, forestry, and fishing	2.00	2.15	11.04%	7.43%
Community, social and personal services	1.73	1.86	9.56%	7.66%
Transport, storage, and communication	1.48	1.57	8.10%	5.98%
General government	1.59	1.57	8.08%	-1.09%
Construction	1.00	0.98	5.07%	-1.53%
Electricity, gas, and water	0.31	0.32	1.65%	3.26%
Mining and quarrying	0.01	0.01	0.06%	-14.32%
Total	18.41	19.43	100.00%	5.51%

Source: Quantec, 2022

Figure 14 provides an overview of the composition of the manufacturing sector in the Overberg district in 2021. Construction was the largest contributor to the district's manufacturing sector, accounting for 25.22% of output. This was followed by the food, beverages, and tobacco sub-sector (20.45%); and the metals, metal products, machinery and equipment manufacturing sub-sector (9.64%).

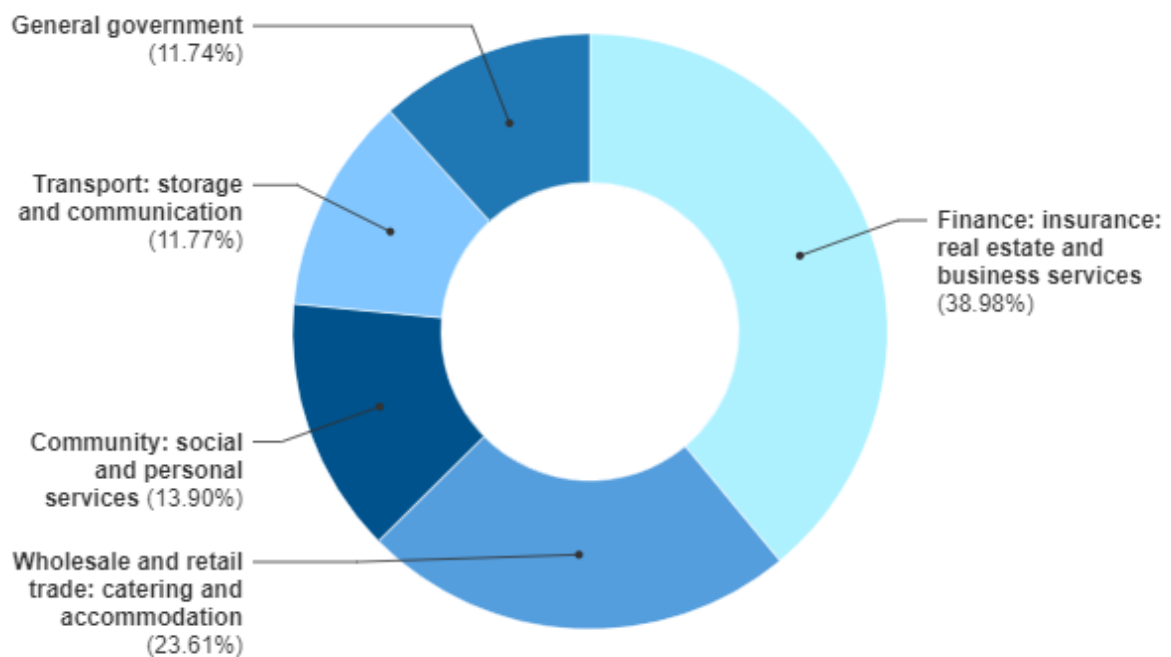
Figure14: Contribution of the Overberg's manufacturing sub-sectors, 2021



Source: Quantec, 2020 (*values in constant 2015 prices)

Figure 15 provides an overview of the services sector in the Overberg district in 2021. The business service sub-sector was the largest contributor to the region's services sector in 2021, accounting for 38.98% of output. It was followed by wholesale and retail trade, catering, and accommodation (23.61%); and then by community: social and personal services (13.90%).

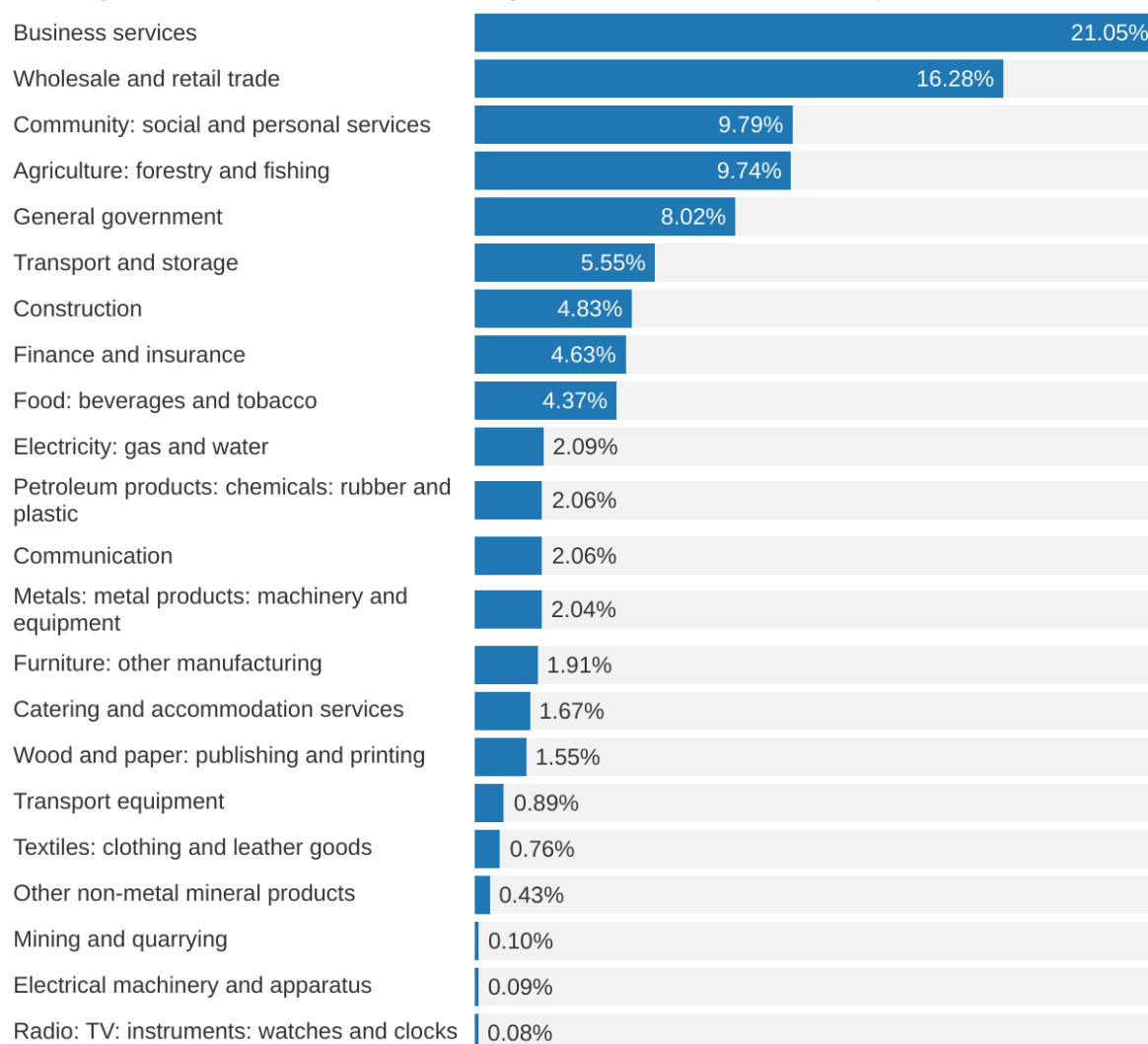
Figure 15: Contribution of the Overberg's services sub-sectors, 2021



Source: Quantec, 2022

Regarding the contribution to the GDP by sub-sectors in 2021, Figure 16 shows that the business services sub-sector was the biggest contributor, accounting for 21.05% of output. This was followed by the wholesale and retail trade sub-sector (16.28%) and the community, social and personal services sub-sector (9.79%).

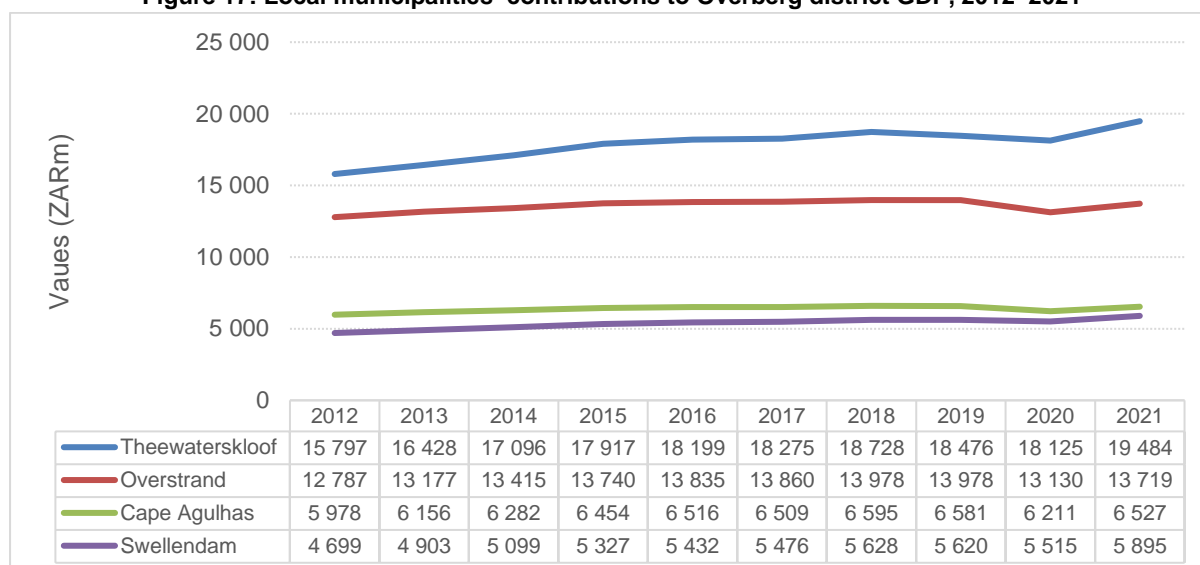
Figure 16: Contribution to the Overberg's GDP (constant 2015 prices) by sub-sectors, 2021



Source: Quantec, 2022

In terms of individual municipal contributions in the Overberg district, the Theewaterskloof's Municipality was the largest contributor to GDP in 2021, accounting for an estimated 42.70% of the total GDP, followed by the Overstrand (30.07%) and the Cape Agulhas (14.31%) municipalities. This can be seen in Figure 17.

Figure 17: Local municipalities' contributions to Overberg district GDP, 2012–2021



Source: Quantec, 2022

Regarding municipal Gross Domestic Product per Region (GDPR) contributions in the primary, secondary and tertiary sectors, Table 6 affirms the dominance of the Theewaterkloof's municipality in the Overberg district. This municipality was the leading economic contributor in the primary, secondary and tertiary sectors. Its contribution to the primary sector can be attributed to the presence of agricultural activities like aquaculture, and the prominence of the stone fruits industry in the area. The secondary sector in the Overberg district consists of manufacturing closely linked with agricultural (agro-processing) activities in the district. The tertiary sector's presence remains relatively important and consists of activities such as the wholesale of agricultural produce, the transport of commodities, and activities related to agro-processing.

Table 6: Municipal GDPR contribution to district sectors, Overberg District Municipality 2021

Municipal GDP (constant 2015 prices) contribution to district sectors, 2021					
	Theewaterskloof	Overstrand	Cape Agulhas	Swellendam	Total
Sector/Industry					
Primary sector	13.41%	7.25%	6.38%	8.95%	100.00%
Agriculture, forestry, and fishing	13.35%	7.10%	6.20%	8.90%	100.00%
Mining and quarrying	0.06%	0.15%	0.17%	0.05%	100.00%
Secondary sector	22.86%	21.20%	21.12%	15.57%	100.00%
Manufacturing	14.62%	15.25%	14.72%	9.73%	100.00%
Electricity, gas and water	2.54%	1.73%	1.95%	1.74%	100.00%
Construction	5.69%	4.22%	4.44%	4.10%	100.00%
Tertiary sector	63.73%	71.55%	72.50%	75.48%	100.00%
Wholesale and retail trade, catering, and accommodation	17.10%	17.52%	20.75%	18.46%	100.00%
Transport, storage, and communication	7.40%	8.03%	8.10%	6.67%	100.00%
Finance, insurance, real estate, and business services	22.23%	29.11%	24.86%	28.98%	100.00%
General government	7.68%	7.55%	8.88%	9.20%	100.00%
Community, social and personal services	9.32%	9.34%	9.91%	12.17%	100.00%
Total	100.00%	100.00%	100.00%	100.00%	100.00%

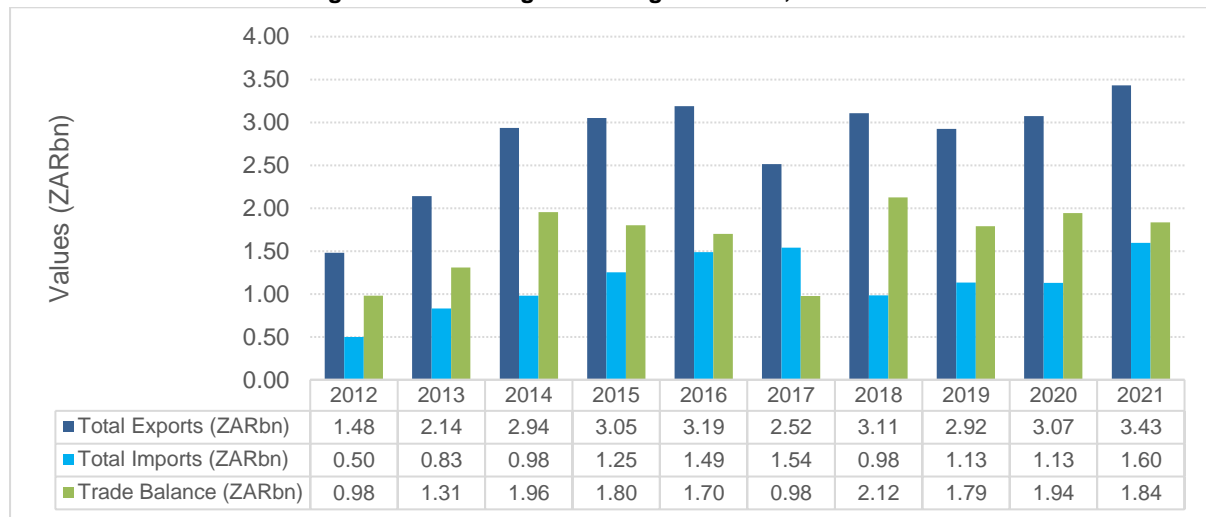
Source: Quantec, 2021

5. Trade

The Overberg district's trade balance remained firmly in surplus throughout the period under review – even though there were fluctuations. This was underpinned by overall increases in export earnings. The trade surplus reached a high point of ZAR1.94bn in 2020, before easing to a still-strong ZAR1.84bn in 2021.

In 2021, the Overberg district's associated export earnings were valued at ZAR3.43bn, an increase of 11.73% on 2020's earnings, and accounted for 2.06% of the Western Cape's total exports. And, at an associated cost of ZAR1.60bn, the district accounted for 0.68% of the province's total imports. These figures are shown in Figure 18.

Figure 18: Overberg district's global trade, 2012–2021



Source: Quantec, 2022

In 2021, the Netherlands was the top export destination for products from the Overberg district, followed closely by the United Kingdom, as shown in Figure 19. During the five-year period from 2017 to 2021, the United States was the fastest growing market for exports from the Overberg district with exports growing by 177.47%, and Australia following with a growth of 170.44%.

Figure 19: Overberg district's top 10 destination markets for exports, 2021

	VALUE 2021 (ZARm)	AVE GROWTH %, 2017-2021	% SHARE, 2021
Netherlands	489.92	2.23	14.27
United Kingdom	470.45	6.12	13.70
Hong Kong Special Administrative Region of China	420.45	10.76	12.25
Australia	218.22	170.44	6.36
United States	190.37	177.47	5.55
United Arab Emirates	176.12	16.30	5.13
Zimbabwe	137.57	67.09	4.01
Germany	126.21	62.08	3.68
China	96.33	3.60	2.81
Taiwan Province of China	87.71	12.39	2.56

Source: Quantec, 2022

Figure 20 shows that in 2021, the top source markets for imports to the Overberg district were China (ZAR308.00m), Swaziland (ZAR180.12m) and Spain (ZAR168.60m). From 2017 to 2021, Namibia was the fastest growing source market for imports to the Overberg with a growth rate of 628.33%, followed by Malaysia (414.82%).

Figure 20: Overberg top 10 source markets for imports, 2021

	VALUE 2021 (ZARm)	AVE GROWTH %, 2017-2021	% SHARE, 2021
China	308.00	36.32	19.28
Swaziland	180.12		11.27
Spain	168.60	41.86	10.55
Malaysia	122.55	414.82	7.67
Lesotho	66.75	43.21	4.18
Vietnam	62.51		3.91
Poland	60.82		3.81
Namibia	60.30	628.33	3.77
Italy	53.41	53.47	3.34
United Kingdom	44.66	-6.87	2.80

Source: Quantec, 2022

An analysis of the products exported by the Overberg district indicates that agribusiness products dominated exports in 2021. Figure 21 shows that exports of apples, pears and quinces, valued at ZAR695.52m, were the largest export group from the Overberg district in 2021. Molluscs and wine were the second and third largest exports, valued at ZAR383.07m and ZAR320.81m respectively.

Figure 21: Overberg district's top 10 export products, 2021

	ZARm	Share%
Apples: pears and quinces	695.52	20.26
Molluscs	383.07	11.16
Wine of fresh grapes	320.81	9.35
Other fresh fruit	286	8.33
Apricots: cherries: peaches	270.5	7.88
Fruit juices	211.17	6.15
Citrus fruit	166.94	4.86
Foliage	127.52	3.71
Crustaceans	82.39	2.4
Other vegetables	59.22	1.73

Source: Quantec, 2022

Imported products were more diverse, with fruit juices dominating the district's import costs. Imports of fruit juices cost ZAR279.11m, representing 17.47% of the total imports in 2021. This was followed by flat-rolled products of iron or non-alloy steel, and mixtures of odoriferous substances and mixtures valued at ZAR185.93m and

ZAR169.72m respectively. Interestingly, the Overberg district's top three import products accounted for 39.73% of total imports in 2021. These figures can be seen in Figure 22.

Figure 22: Overberg district's top 10 import products, 2021

	ZARm	Share%
Fruit juices	279.11	17.47
Flat-rolled products of iron or non-alloy steel	185.93	11.64
Mixtures of odoriferous substances and mixtures	169.72	10.62
Live bovine animals	65.2	4.08
Other colouring matter: preparations as specified in Note 3 to this Chapter	54.43	3.41
Harvesting or threshing machinery	42.81	2.68
Sunflower-seed: safflower or cotton-seed oil	42.12	2.64
Synthetic organic colouring matter	41.74	2.61
Olive oil and its fractions	36.18	2.26
Fish	33.1	2.07

Source: Quantec, 2022

6. Investment

6.1 Growth opportunities

6.1.1 Food, beverages, and tobacco

The Overberg district has a variety of agro-processing activities, including winemaking and juice-making, dairy production, honeybush-tea processing, and abalone processing. These agricultural activities give the area a comparative advantage in agro-processing because investing in them will enhance job creation, either directly or indirectly.

6.1.2 Transport and storage

The transport and storage sector is a valuable role player in the agricultural sector. Many of the commodities produced in the area are transported nationwide, and they are also exported. The availability of cold-chain facilities and well-maintained road infrastructure are some of the key aspects that will strengthen this sector.

6.1.3 Construction

The district also has a comparative advantage in the construction sector, but this sector has been experiencing below-average growth since 2015. This poor performance can be attributed to the overall decline in economic performance and the challenges the sector faced nationally in 2019. However, the sector can be boosted by ensuring that building plans are approved within specified timeframes, and that allocated budgets for government infrastructure projects are spent.

6.1.4 Space sector

Due to its position near Africa's southernmost tip, the Overberg district is an ideal location for space-based and ground-based systems that can provide the correct information at the right time to the government and the private sector. A wide variety of opportunities in the space sector exist in the Overberg district. These include the positioning of the head office for the South African National Space Agency (SANSA), the Space Operations Programme (located in Hartebeest Hoek), the Space Science Programme (located in Hermanus), the Earth Observation Programme, and a newly established Space Engineering Programme. The Denel Overberg Test Range, which is ideal for LEO satellite launches into sun-synchronous and polar orbits, is also positioned in the district. The Test Range has been used exclusively for the advanced testing of non-space related systems for domestic and international customers. The focus of the Test Range's current space initiatives is to support the Department of Science & Technology and SANSA in developing and executing a launch plan. Relying on the experience gained during the previous space programme, the Test Range can provide crucial assistance in aligning South Africa's space priorities, ground launch infrastructure, launch vehicle manufacturing and a satellite development programme.

6.1.5 Other sectors

Opportunities in the wholesale and retail trade, and in the transport and storage sectors, as well as the comparative advantage in smaller manufacturing sectors (such as textiles, clothing, and leather goods; and metals, metal products, machinery and equipment) emphasise the need for investment in the business centres of the district.

These activities are reliant on well-functioning, easily accessible industrial spaces, and on good infrastructure for logistical purposes. However, the Theewaterskloof, Cape Agulhas and Swellendam municipal areas identified infrastructure-related challenges as one of the biggest constraints when it came to promoting economic growth in 2019.

6.2 Inward FDI investments

Table 7 shows the FDI investment into the Overberg district between Jan 2003 and Oct 2022. During this period, only one FDI investment was made by South African Breweries of Belgium, who invested ZAR79.80m in the food and beverages industry.

Table 7: Overberg inward FDI, January 2003–October 2022

Top FDI into the Overberg district, Jan 2003–Oct 2022						
Date	Investing company	Source country	Industry sector	Business activity	Capex (ZARm)	Jobs
Sep-19	South African Breweries	Belgium	Food & Beverages	Research & Development	79.80m	17
Total					79.80	17

Source: FDI Intelligence, 2022

6.3 Companies in the Overberg district

Table 8 lists the companies operating in the Overberg district.

Table 8: Companies in the Overberg district

Company	Location	Industry
16 Kindon Road Properties (Pty) Ltd	Hermanus	Financial Intermediation, Insurance, Real Estate and Business Services
Abagold Ltd	Hermanus	Agriculture, Hunting, Forestry and Fishing
Amanzi Bargaining Council	Hermanus	Community, Social and Personal Services
Aqunion (Pty) Ltd	Hermanus	Agriculture, Hunting, Forestry and Fishing
Haygrove Heaven (Pty) Ltd	Hermanus	Agriculture, Hunting, Forestry and Fishing
Hermanus Clothing Manufacturing (Pty) Ltd	Hermanus	Manufacturing
HIK Abalone Farm (Pty) Ltd	Hermanus	Agriculture, Hunting, Forestry and Fishing
Overstrand Local Municipality	Hermanus	Community, Social and Personal Services
Agri Organics CC	Grabouw	Agriculture, Hunting, Forestry and Fishing
Appletiser South Africa (Pty) Ltd	Grabouw	Manufacturing
Associated Fruit Processors (Pty) Ltd	Grabouw	Manufacturing
Ecosoil (Pty) Ltd	Grabouw	Agriculture, Hunting, Forestry and Fishing
Ecosoil Trust	Grabouw	Agriculture, Hunting, Forestry and Fishing
Elgin Free Range Chickens (Pty) Ltd	Grabouw	Wholesale and Retail Trade
Elgin Fruit Juices (Pty) Ltd	Grabouw	Manufacturing
Elgin Poultry Abattoir (Pty) Ltd	Grabouw	Manufacturing
Kromco (Pty) Ltd	Grabouw	Wholesale and Retail Trade
NJ Express Couriers (Pty) Ltd	Grabouw	Transport, Storage and Communication
Oude Molen Distillers (Pty) Ltd	Grabouw	Manufacturing
P C Kelders (Pty) Ltd	Grabouw	Manufacturing
Snyman Business Trust	Grabouw	Agriculture, Hunting, Forestry and Fishing
Two-A-Day Group (Pty) Ltd	Grabouw	Agriculture, Hunting, Forestry and Fishing
AAF Services (Pty) Ltd	Caledon	Financial Intermediation, Insurance, Real Estate and Business Services
Bernhardt Konsultante (Pty) Ltd	Caledon	Financial Intermediation, Insurance, Real Estate and Business Services
Overberg Agri Bedrywe (Pty) Ltd	Caledon	Wholesale and Retail Trade
Overberg Water Board	Somerset West	Electricity, Gas and Water Supply
South African Breweries Barley Farm (Pty) Ltd	Caledon	Manufacturing
South African Breweries Maltings (Pty) Ltd	Caledon	Agriculture, Hunting, Forestry and Fishing
Theewaterskloof Local Municipality	Caledon	Community, Social and Personal Services
Agulhas Honeybush Tea CC	Bredasdorp	Manufacturing
Bontebok Limeworks (Pty) Ltd	Bredasdorp	Manufacturing
Cape Agulhas Local Municipality	Bredasdorp	Community, Social and Personal Services
Kamersvol Geskenke CC	Stellenbosch	Wholesale and Retail Trade
Kapula Candles South Africa (Pty) Ltd	Bredasdorp	Manufacturing
Overberg District Municipality	Bredasdorp	Community, Social and Personal Services
C and M Multi Craft CC	Swellendam	Manufacturing
Falcon Inflatables (Pty) Ltd	Swellendam	Manufacturing
Rain Africa Innovations (Pty) Ltd	Swellendam	Manufacturing
Sentraal-Suid Kooperasie Beperk	Swellendam	Community, Social and Personal Services
Southern Oil (Pty) Ltd	Swellendam	Manufacturing
Swellendam Local Municipality	Swellendam	Community, Social and Personal Services

Source: WhoOwnsWhom, 2021

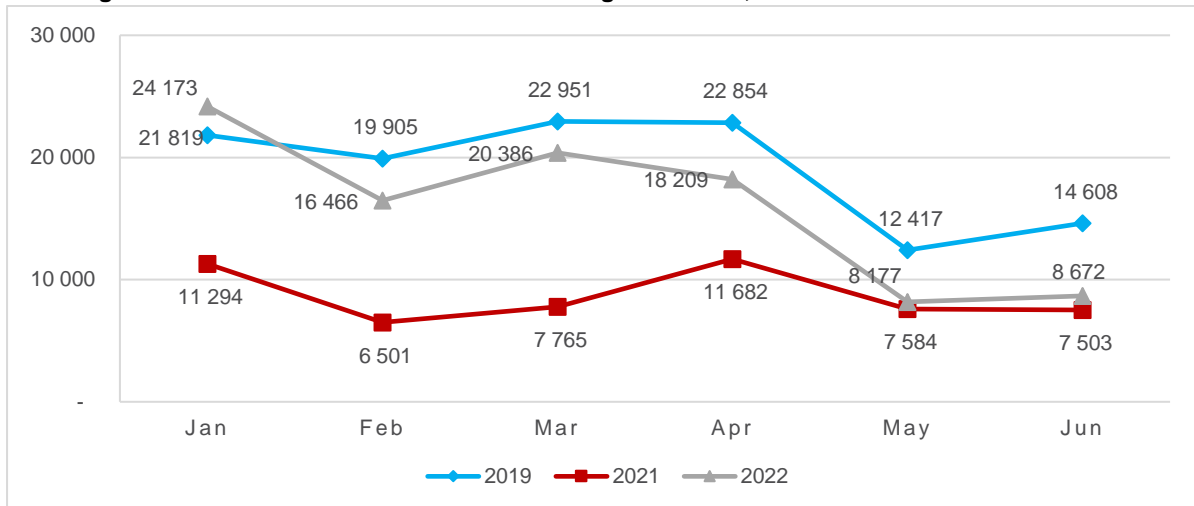
7. Tourism

7.1 Performance of Overberg district attractions

A total of 96,083 people visited Overberg attractions between January and June 2022, showing a recovery rate of 84% compared to the same period in 2019.

Visitor numbers were the highest in January 2022, exceeding the 2019 figure by 11%. In 2022 visitor numbers were the second highest in March, followed by visitors in April and then in February. The number of visitors started slowing down in May and June which coincides with the province's winter period.

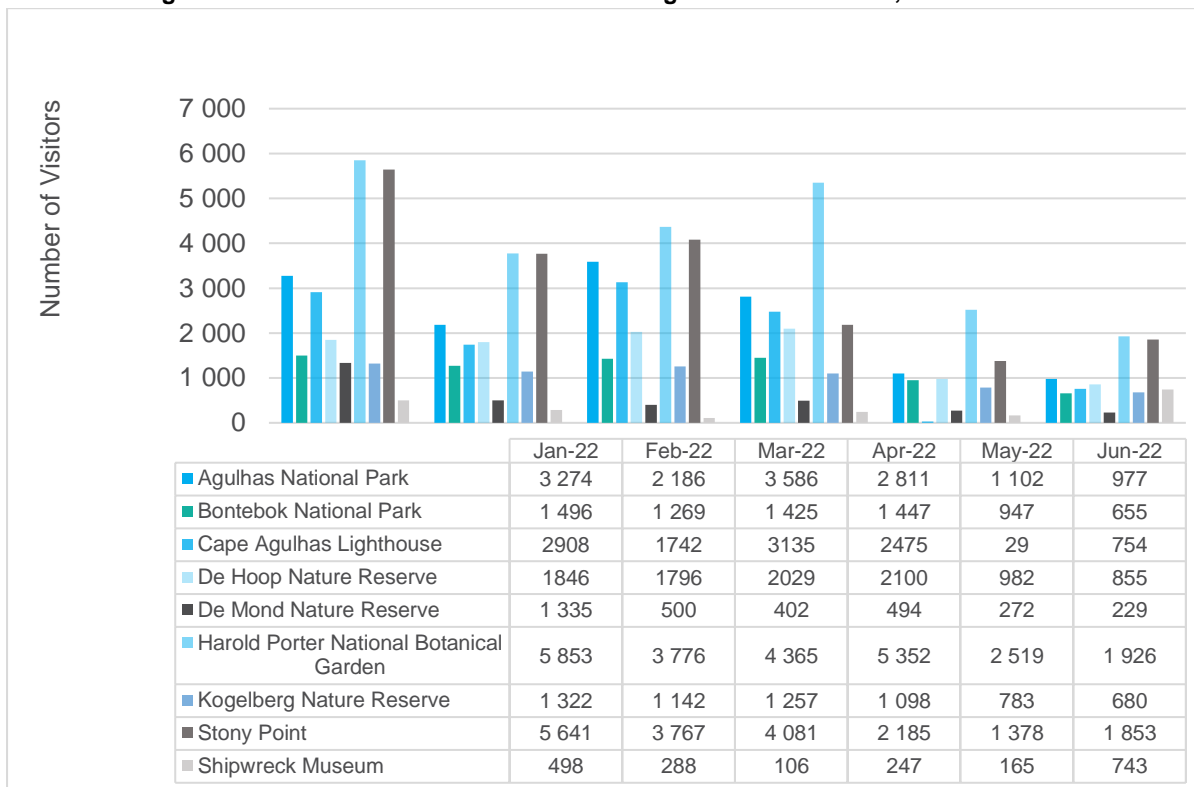
Figure 23: Total number of visitors to Overberg attractions, Jan–June 2019 vs. Jan–June 2022



Source: SANParks, 2022

Figure 24 shows that outdoor attractions like Harold Porter Botanical Gardens, De Hoop Nature Reserve, De Mond Nature Reserve, Kogelberg Nature Reserve, and Stony Point have been particularly popular.

Figure 24: Total number of visitors to Overberg district attractions, Jan–June 2022



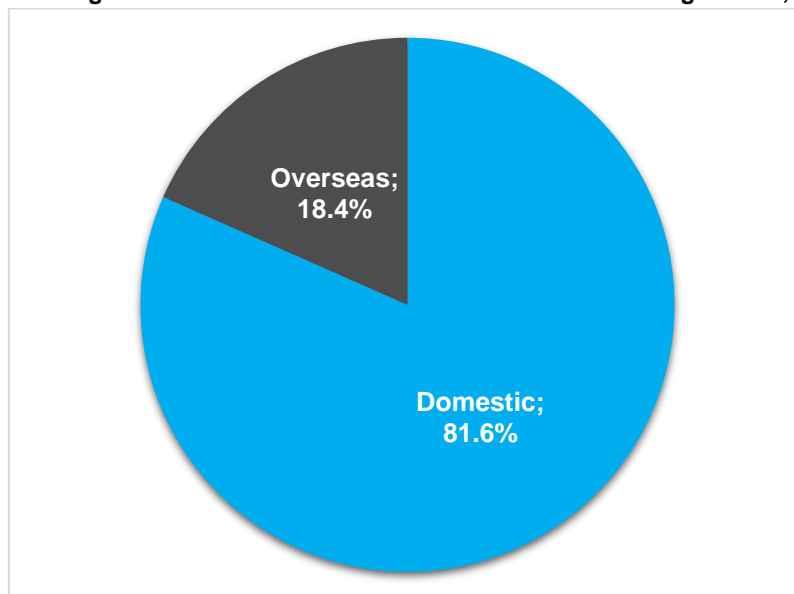
Sources: SANParks, SANBI, L'Agulhas and Hangklip/Kleinmond Tourism Offices, 2022

7.2 Overberg district's visitor trends & patterns

7.2.1 Origin of visitors

Figure 25 shows that domestic visitors made up 81.6% of travellers to the Overberg district in 2021. The lack of international visitors was likely due to international travel restrictions brought on by the COVID-19 pandemic.

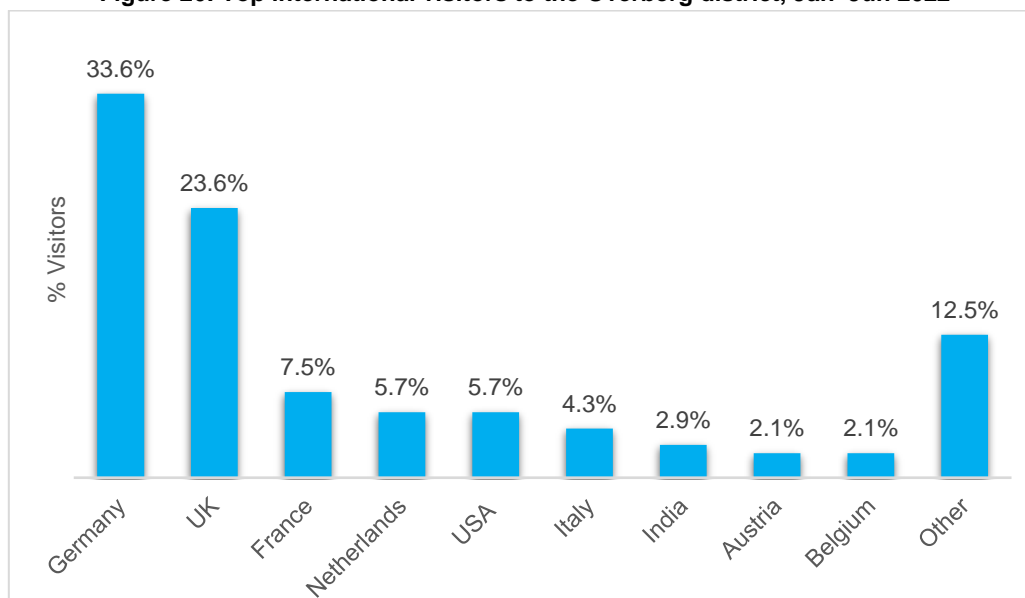
Figure 25: Percentage of overseas and domestic visitors to the Overberg district, Jan–Jun 2022



Source: Wesgro Cape Karoo Tourism Trends, 2022

The figure below highlights the top global visitors to the Overberg over the period January to June 2022.

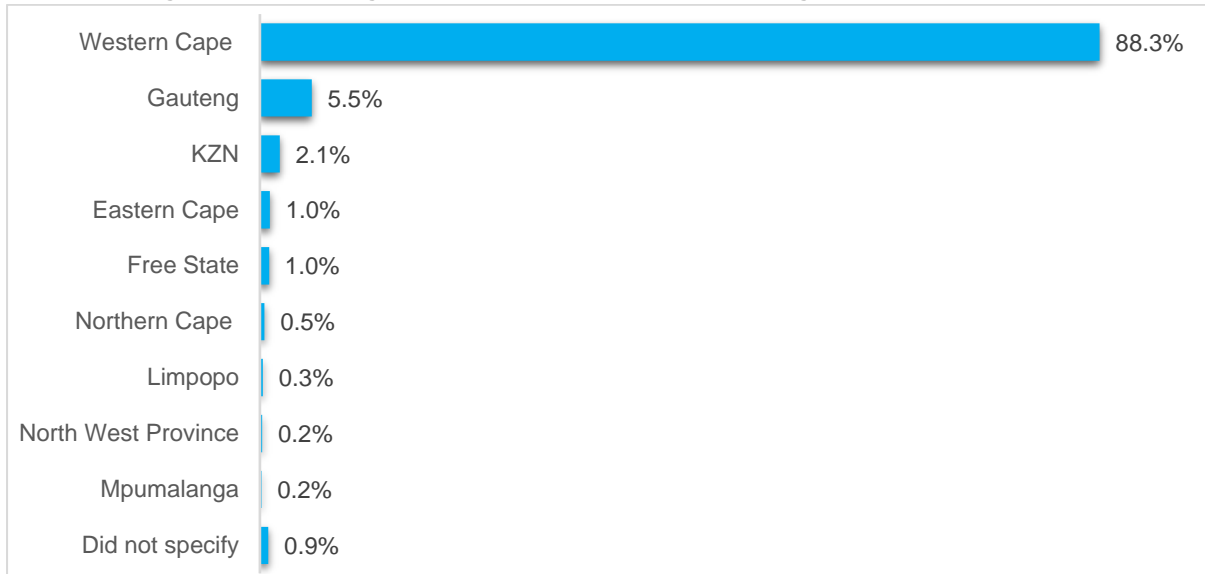
Figure 26: Top international visitors to the Overberg district, Jan–Jun 2022



Source: Wesgro Cape Overberg Tourism Trends, 2022

Despite financial and economic constraints, trends indicate that domestic travellers continue to travel. Figure 27 shows that from January to June 2022, the largest share of domestic travellers to the region came from the Western Cape (88.3%), which indicates that the Overberg district is a popular destination for locals in the province. Gauteng and KwaZulu-Natal brought in 5.5% and 2.1% of domestic tourists into the region.

Figure 27: Percentage of domestic visitors to the Overberg district, Jan–Jun, 2022



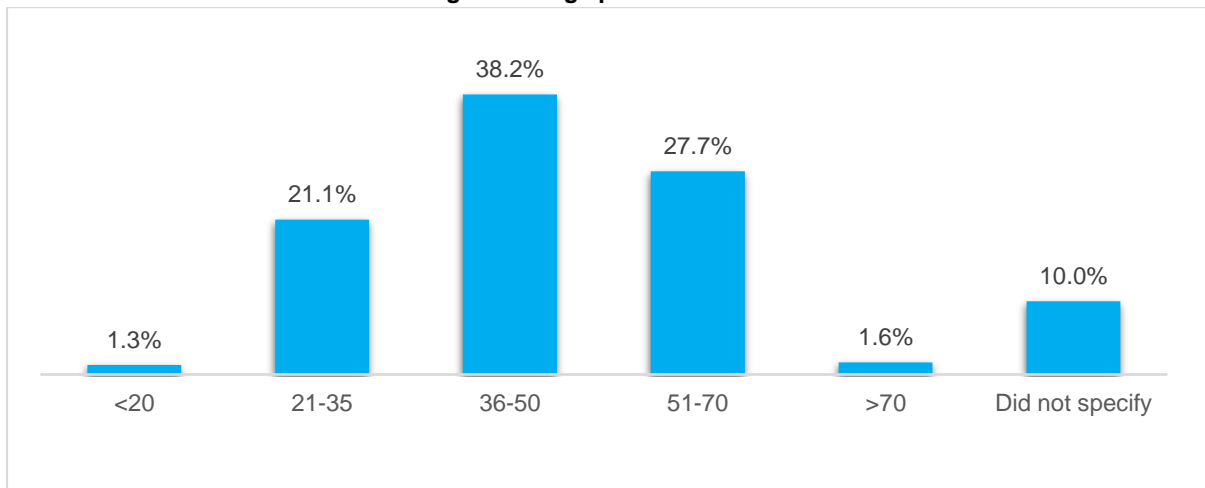
Source: Wesgro Cape Overberg Tourism Trends, 2022

7.2.2 Visitors' age

The Overberg district is a region that stretches along coasts with beautiful beaches, and over mountain ranges with interesting geological formations, abundant birdlife and fynbos, making it an all-round destination for all ages.

Figure 28 indicates that in 2022, most visitors (38.2%) were between 36 and 50 years of age. A further 27.7% of respondents were 51–70 years, and 21.1% were in the 21–35 age group.

Figure 28: Age profile of visitors

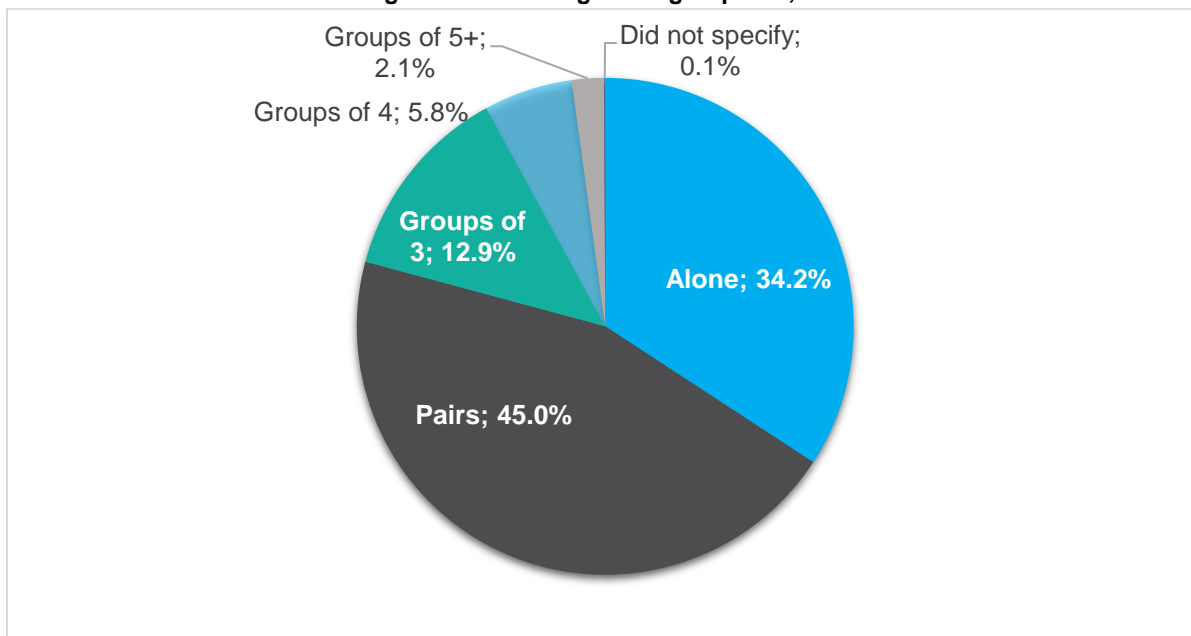


Source: Wesgro Cape Overberg Tourism Trends, 2022

7.2.3 Group size

As Figure 29 shows, nearly half of respondents travelled in pairs (45.0%) and a further 34.2% travelled alone.

Figure 29: Overberg travel group size, 2022

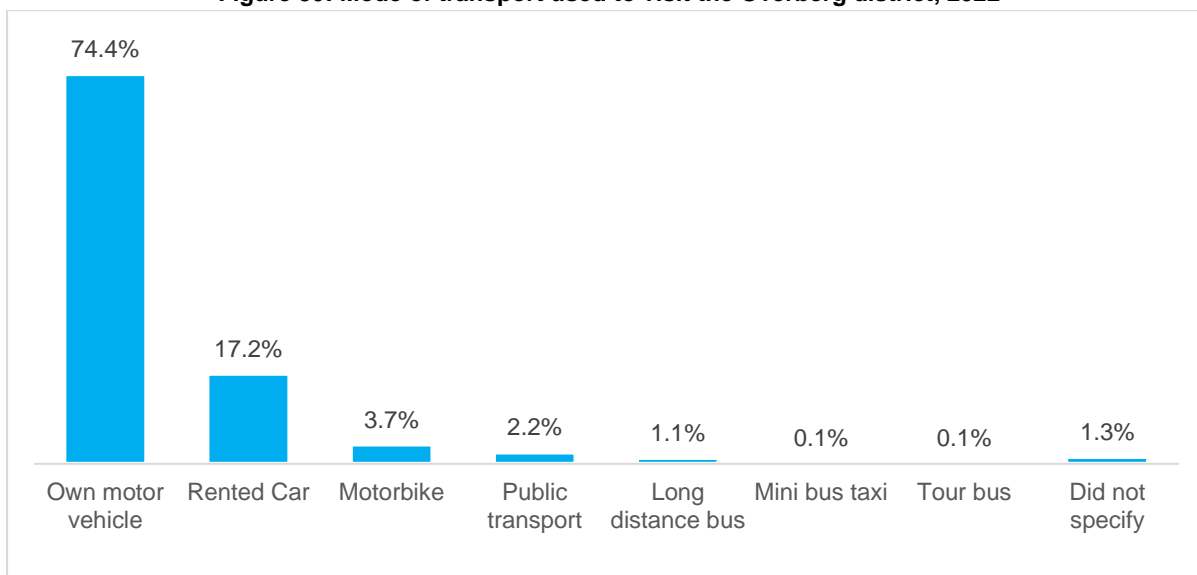


Source: Wesgro Cape Overberg Tourism Trends, 2022

7.2.4 Mode of transport

Many respondents travelled to the region in their own vehicles (74.4%) or in rented cars (17.2%) – see Figure 30.

Figure 30: Mode of transport used to visit the Overberg district, 2022

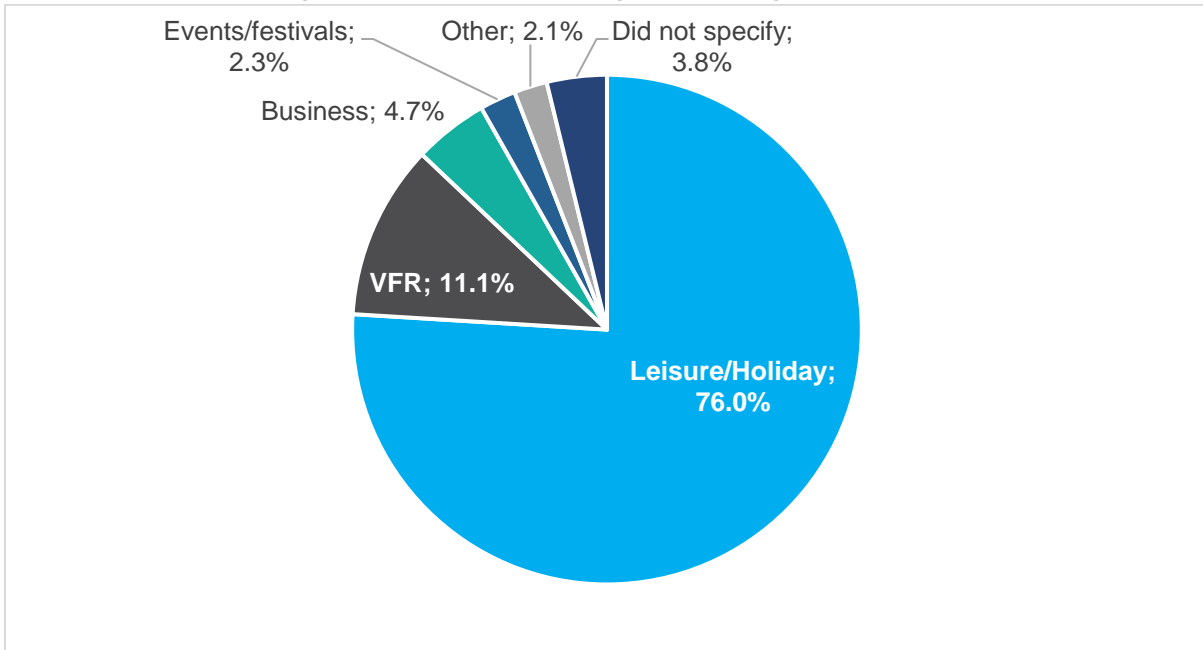


Source: Wesgro Cape Overberg Tourism Trends, 2022

7.2.5 Purpose of visit

Holiday/leisure was the main motivating factor for people travelling to the Overberg district. Some 76% of respondents cited this as the reason for their visit. And 11.1% of visitors said they were visiting friends and family (VFR). Figure 31 shows these figures.

Figure 31: Reasons for visiting the Overberg district, 2022

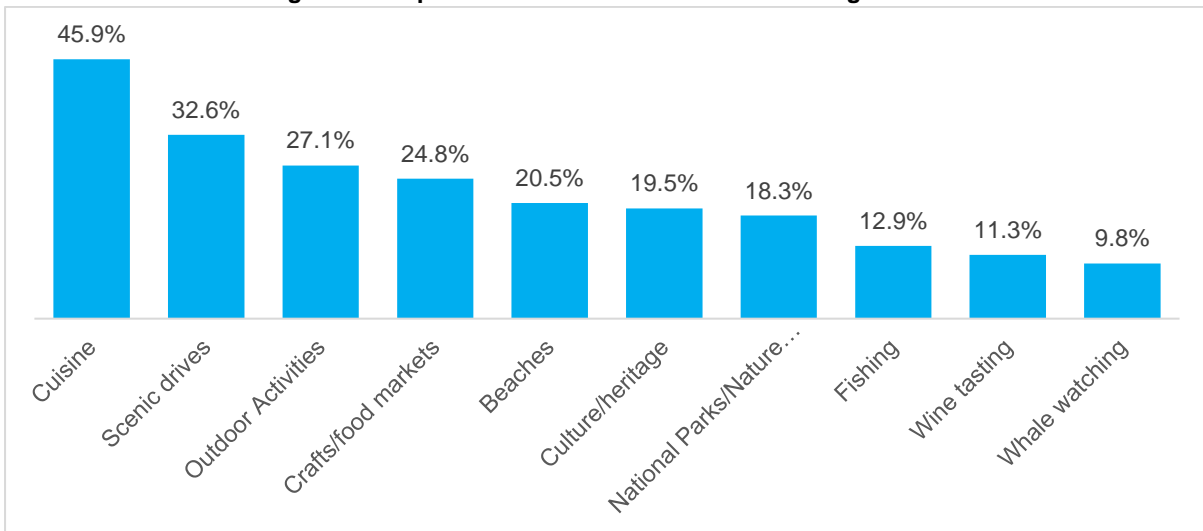


Source: Wesgro Cape Overberg Tourism Trends, 2022

7.2.6 Top visitor activities in the Overberg district

The Cuisine activity by 45.9% topped as the most undertaken activity followed by Scenic drives and Outdoor activities at 32.6% and 27.1% respectively. Figure 32 below highlights the top 10 activities undertaken in the Overberg district.

Figure 32: Top activities undertaken in the Overberg district

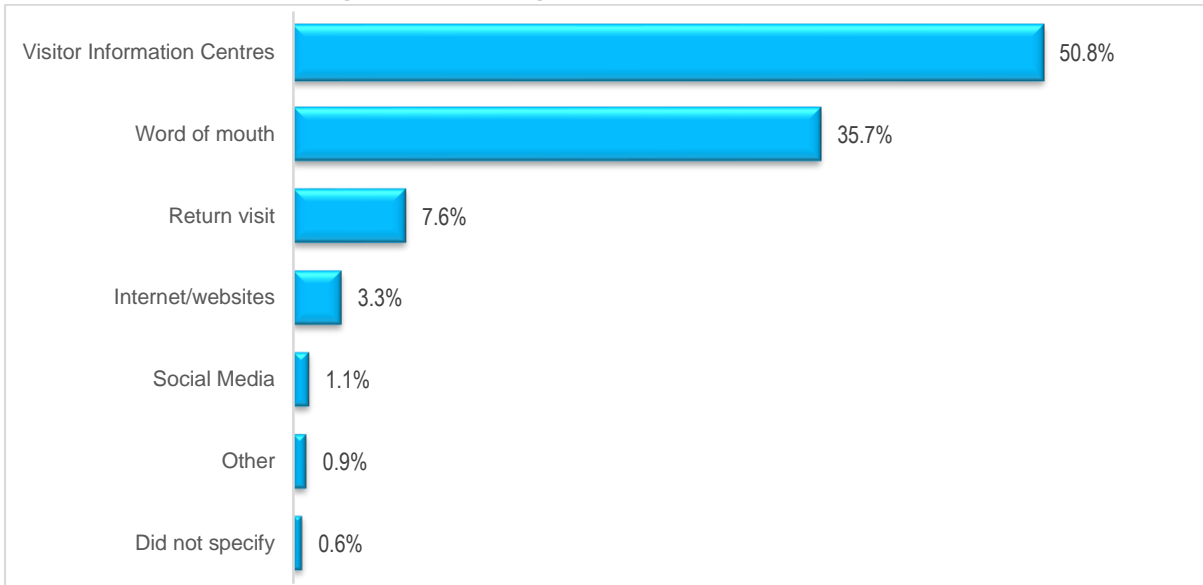


Source: Wesgro Cape Overberg Tourism Trends, 2022

7.2.7 Information sources

Figure 33 represents figures related to sources used by visitors to gather information about the region. The top three sources of information were VICs (50.8%), word of mouth (35.7%), and return visits (7.6%).

Figure 33: Overberg top information sources, 2022

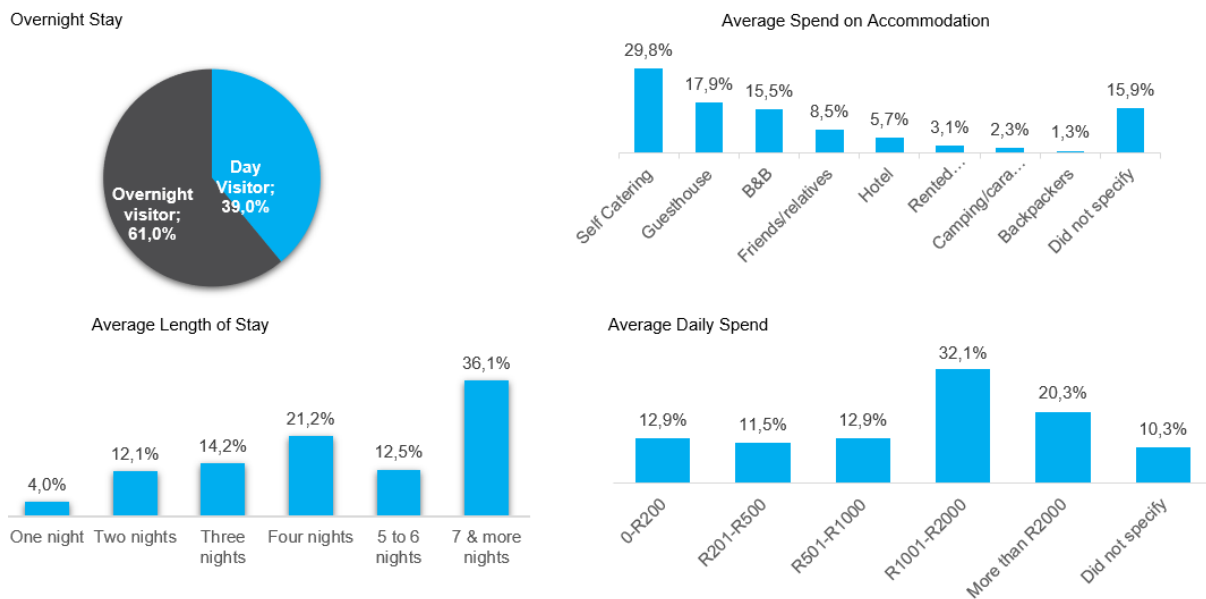


Source: Wesgro Cape Overberg Tourism Trends, 2022

7.2.8 Other visitor trends and patterns

Below is an outlook of visitor trends in the Overberg region in terms of average length of stay, average spent on accommodation and spending patterns.

Figure 34: Overberg district visitor trends and patterns



Source: Wesgro Cape Overberg Tourism Trends, 2022

8. Film



The Overberg district stretches from the Hottentots-Holland mountains in the west to Swellendam in the east. In the north it reaches as far as the Riviersonderend mountains. Clarence drive, or locally known as the R44, which is one of the most scenic drives in the world, is a popular setting for filming, especially commercials involving vehicles. The same goes for the gravel roads through the forests in Elgin Valley, Grabouw. In the seaside village of Gansbaai, wildlife and documentary film crews can often be seen, as this is the place often frequented by the great white shark. There are a few hot spots in the Overberg that host regular film shoots and still plenty of hidden gems to be explored. Hermanus, Pringle Bay, Kleinmond, Gansbaai, Elgin and Botriver are among the most popular, as is the picture-perfect village of Arniston.

8.1 Style of architecture

The architectural style of places is varied, ranging from well-preserved historical Cape Dutch farmhouses (some dating from 1837), informal settlements and quaint cottages, to ultra-modern beach houses, five-star hotels and casinos.

8.2 Key information

Film crews wishing to access municipal properties will require a permit that is available at the local town council. Rates are dependent on the size of the crew and the duration of the shoot. For road closures the traffic department needs to be involved. Filming in nature reserves and on beaches requires an ECO guide and an environmental impact study with the application. When filming on private property or in an estate, film crews will need landowners' permission and permission from the governing body.

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Website: www.wesgro.co.za

Table 9: Films and other media shot on location

Films	Sirkel van Noodlot, The Dark Tower, The Whale Caller, Resident Evil 6, Doomsday
TV Services	Black Sails, The Crown, Of Kings & Prophets, Homeland, Blood Drive, North Men
Commercials	Sing Meinen Song, MTV The Challenge
Reality	Coronation, Dawn, Amarak, Jeep, Fisheagle, Whiskey, Bobtail, Firestone, Cadbury's
Music Video	Rheed vs The Giant

Source: Wesgro Film and Media Promotion Unit; Creative Locations, 2022

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