

Executive Summary

This destination fact sheet provides key trade and investment related statistics for the Overberg district. Specifically, it shows the Overberg area, employment, trade, and investment trends with the rest of the world. The key highlights are provided below:

Economy

- The Overberg district is the fifth largest economy among the six districts of the Western Cape.
- In 2023, the Overberg district contributed an estimated ZAR20.38bn to the Western Cape economy as measured by real Gross Value Added (GVA) at basic 2015 prices. This represented a contribution of 3.42% to the Western Cape's economy.
- The Overberg district's economy grew by an estimated 1.20% in 2023.
- The Theewaterskloof municipality accounted for the largest share of the district's GVA in 2023, which at a value of ZAR8.48bn, was equivalent to 41.6% of the Overberg district's total GVA.
- The finance, insurance, real estate and business services sector contributed the most to the Overberg district's GVA, which at value of ZAR5.67bn accounted for 27.82% of value added in 2023.
- The food, beverages and tobacco sub-sector was the largest contributor to the Overberg district's manufacturing sector in 2023, which at a value of ZAR759.1m equated to 28.27% of the sector's output in 2023.
- The finance, insurance, real estate and business services sub-sector also made the largest contribution (40.41%) to the Overberg services sector in 2023.

Trade

- The Overberg district was a net exporter of goods over the 2019–2023 period, with the region exporting goods to the value of ZAR4.44bn in 2023, 4.92% y-o-y lower than the ZAR4.67bn exported in 2022.
- In 2023 the United Kingdom was the largest destination market for exports from the Overberg district at a value of ZAR558.16m, equivalent to 12.57% of total exports earnings.
- The leading source market for imports into the Overberg district in 2023 was Malaysia at an associated cost of ZAR253.79m, equivalent to 18.13% of total imports costs incurred.
- Apples, pears and quinces were the Overberg district's leading export product category in 2023 with export earnings of ZAR1,147m, equivalent to 25.83% of total export earnings. Molluscs, and other fruits ranked second and third, accounting for 10.52% (ZAR467.27m), and 9.95% (ZAR442.04m) respectively of total export earnings.

Investment

- According to Foreign Direct Investment (FDI) Intelligence, one foreign investment worth ZAR79.77m was recorded in the Overberg district over the period January 2003 and May 2024.

Tourism

- Based on the findings of the 2023 Annual Wesgro Regional Tracking Survey, most of the visitors (70.59%) travelled to the region primarily for leisure/holiday and 17.23% visited friends and relatives. Some came for business (5.94%) and events/festivals (3.22%), whereas a small percentage visited for purposes of medical/health (1.65%).
- The most popular activities among tourists include exploring different cuisines (16.89%), taking scenic drives (10.11%), participating in outdoor activities (9.78%), visiting local food and craft markets (9%), and experiencing cultural and heritage sites (8.24%).

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, 2023



Source: Overberg District Municipality, 2024

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.

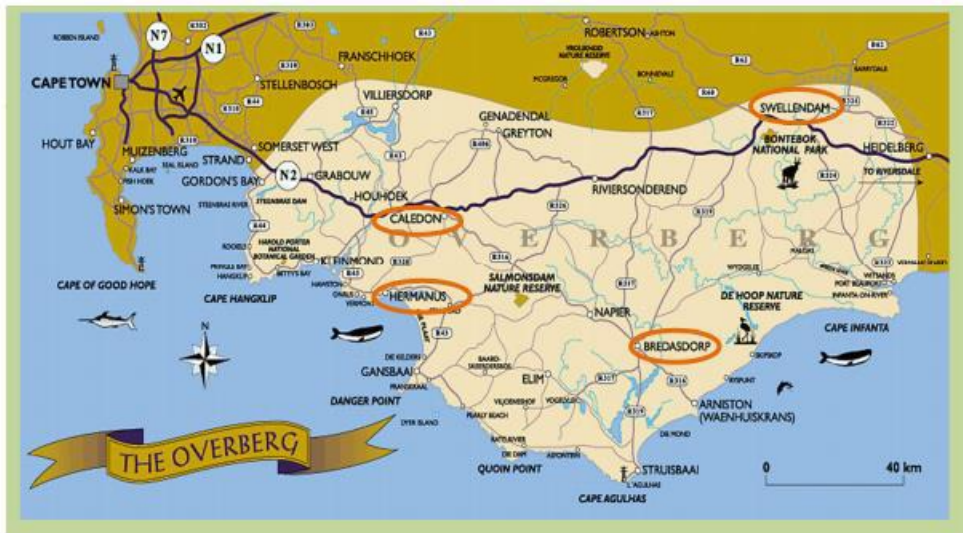
Figure 2: Overberg District Municipality, 2023



Source: Overberg District Municipality, 2024

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, 2023



Source: Overberg District Municipality, 2024

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 2022/23

2 General Information

Table 1 shows the key indicators for the Overberg district.

Table 1: Overberg District Municipality general information, 2023

KEY INDICATORS – OVERBERG DISTRICT MUNICIPALITY	
Executive Mayor	Alderman Andries E Franken
Population (2023)	368 792
GVA (2023)	ZAR20,38bn
GVA Growth (2023)	1.20%
Literacy rate (2023)	65.43%
Ethnic groups (2023)	Black (31.82%), Coloured (51.11%), Indian & Asian (0.29%), White (16.78%)
Languages	Afrikaans (68%); isiXhosa (21%); English (6%); Sesotho (2%); Other (3.1%).

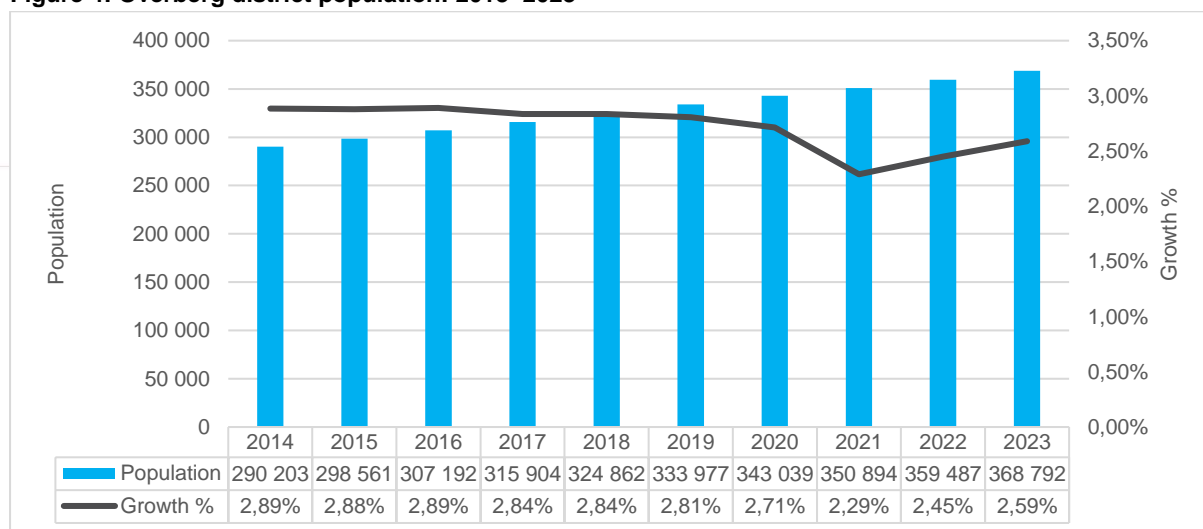
Source: Quantec, 2024

2.1 Demographics

The Overberg district was home to approximately 368,792 people in 2023, making it the second smallest district population outside of the Cape Town Metro in the Western Cape province. The district accounted for 4.88% of the province's population in 2023, with the province's largest population in the City of Cape Town (4 853 997) and the smallest in the Central Karoo district (104,175).

In 2023, the Overberg district's population increased by 2.59% y-o-y to 368,792, up from 359,487 people recorded in 2022 as shown in Figure 4. The population of the Overberg grew at an annual average rate of 2.72% over the decade 2014 - 2023.

Figure 4: Overberg district population: 2013–2023



Source: Quantec, 2024

The population density of the Overberg district was 30.13 people per square kilometre in 2023, up from 29.37 in 2022, and 28.67 in 2019. The region's population density was slightly more than half of the Western Cape's total average of 58.41 people per square kilometre in 2023.

Table 2: Population density per square kilometer in Western Cape municipal districts, 2023

DISTRICT	2021	2022	2023
City of Cape Town	1,919.95	1,951.76	1,984.92
Cape Winelands	39.82	40.18	40.57
Garden Route	35.19	35.94	36.74
Overberg	28.67	29.37	30.13
West Coast	15.71	15.99	16.29
Central Karoo	2.58	2.63	2.68

Source: Quantec, 2024

From a demographic perspective, Table 3 indicates that the Coloured population is the largest group in the district, accounting for an estimated 51.11% (188,484 people) of the total Overberg population in 2023. This is followed by Black Africans at 31.82% (117,352 people), Whites at 16.78% (61,885 people), and Indians or Asians at 0.29% (1,070 people).

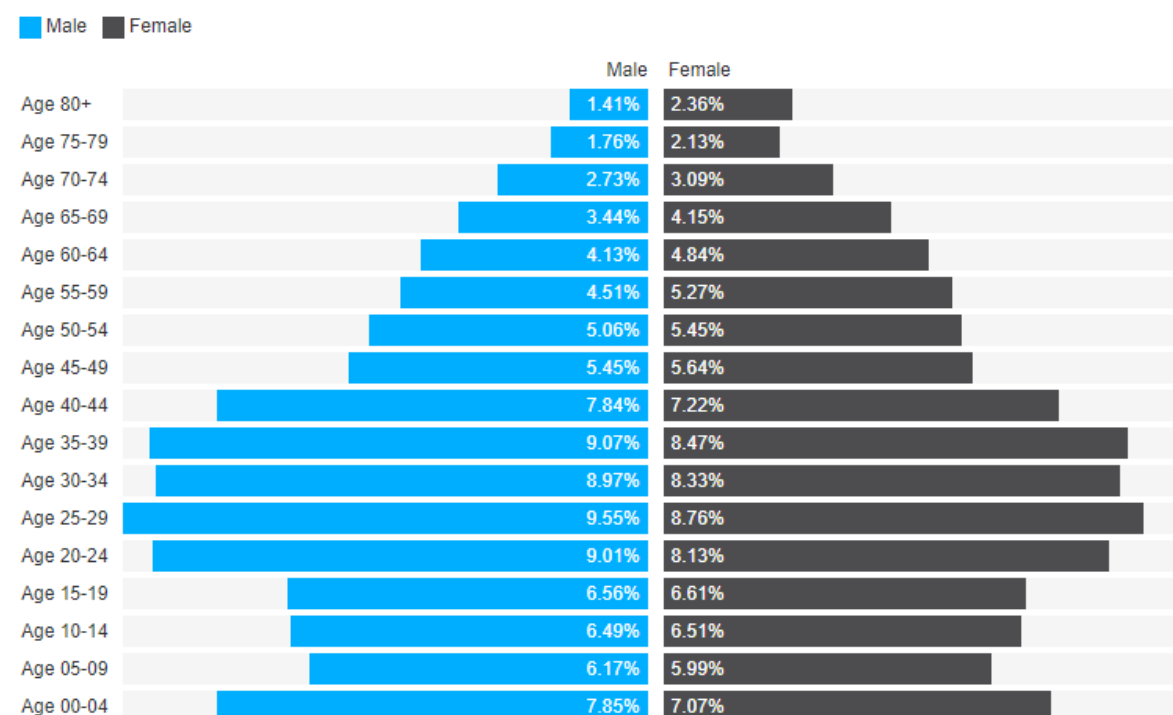
Table 3: Population breakdown by demographic group, 2022–2023

Group	2022	2023	% Share 2023	2022 - 2023 % change
Coloured	184,543	188,484	51.11%	2.14%
Black African	113,170	117,352	31.82%	3.71%
White	60,748	61,885	16.78%	1.87%
Asian/Indian	1,027	1,070	0.29%	4.21%

Source: Quantec, 2024.

Figure 5 illustrates a normal distribution by age and sex. The largest age groups for both males and females were those aged 25 to 29 years (9.55% and 8.76%) respectively, indicating a concentration of the median-aged workforce in the region. Conversely, the 80+ age group represented the smallest demographic for males, and the age group 75-79 represented the smallest demographics for females, (2.13%).

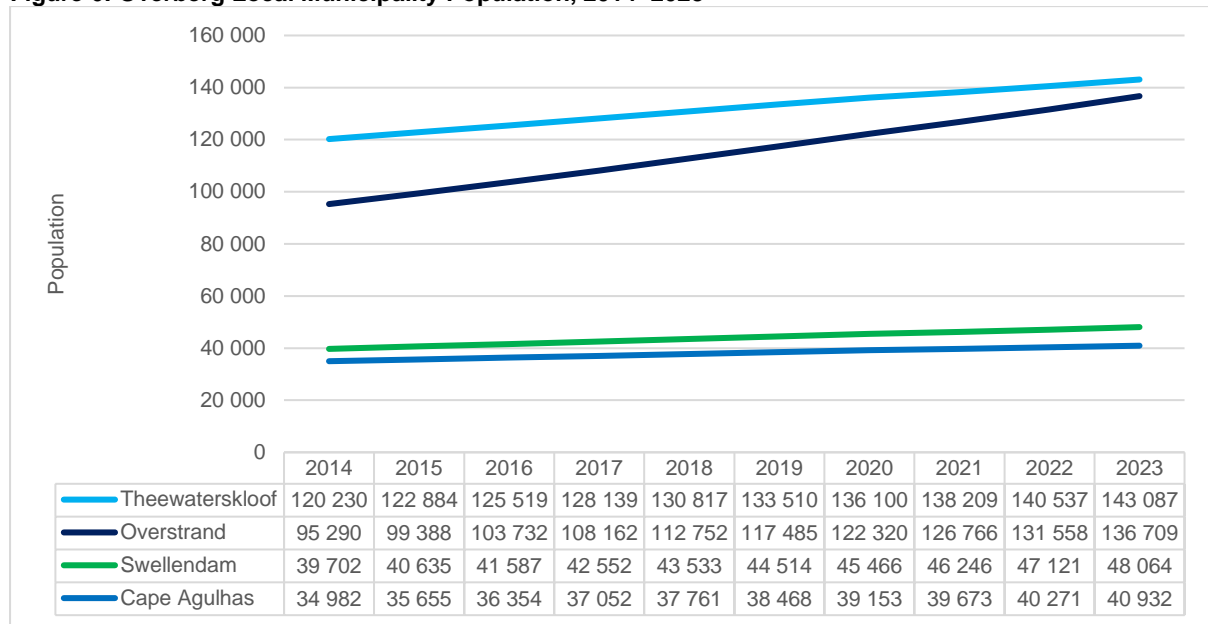
Figure 5: Overberg district’s population distribution January – December 2023



Source: Quantec, 2024

Over the past decade, Theewaterskloof municipality has consistently had the largest population in the Overberg district. The Overstrand followed, with Swellendam, and Cape Agulhas home to the third and fourth largest populations amongst district municipalities respectively.

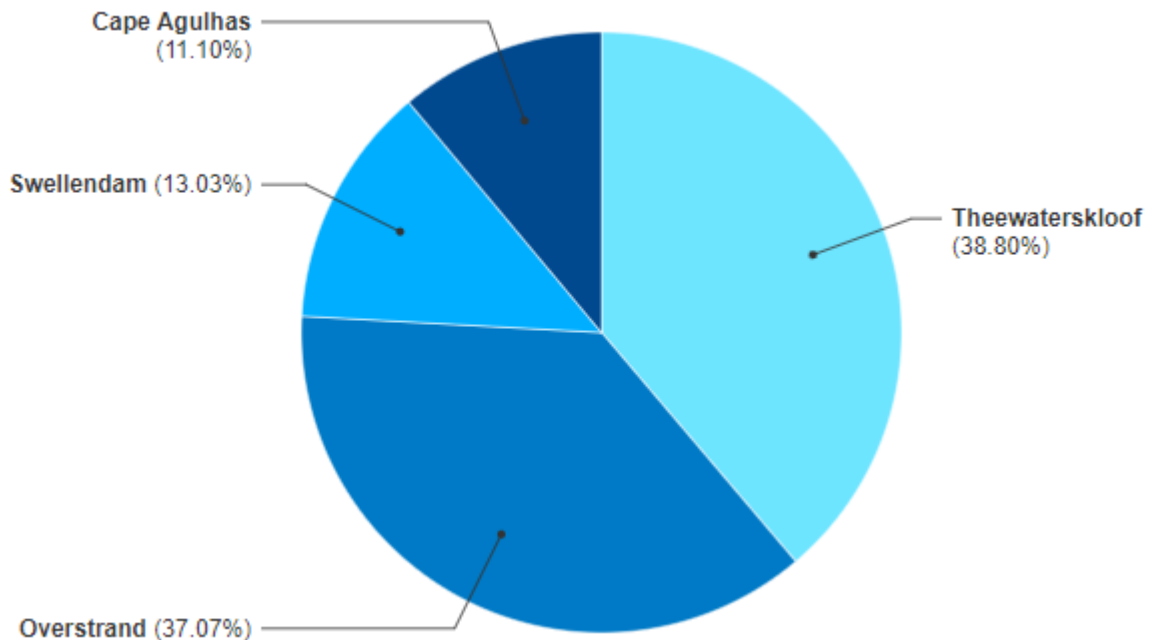
Figure 6: Overberg Local Municipality Population, 2014–2023



Source: Quantec, 2024

As indicated in Figure 7 below in 2023 the largest proportion of the Overberg's population lived in Theewaterskloof (38.80%), followed by Overstrand (37.07%), Swellendam (13.03%) and Cape Agulhas (11.10%).

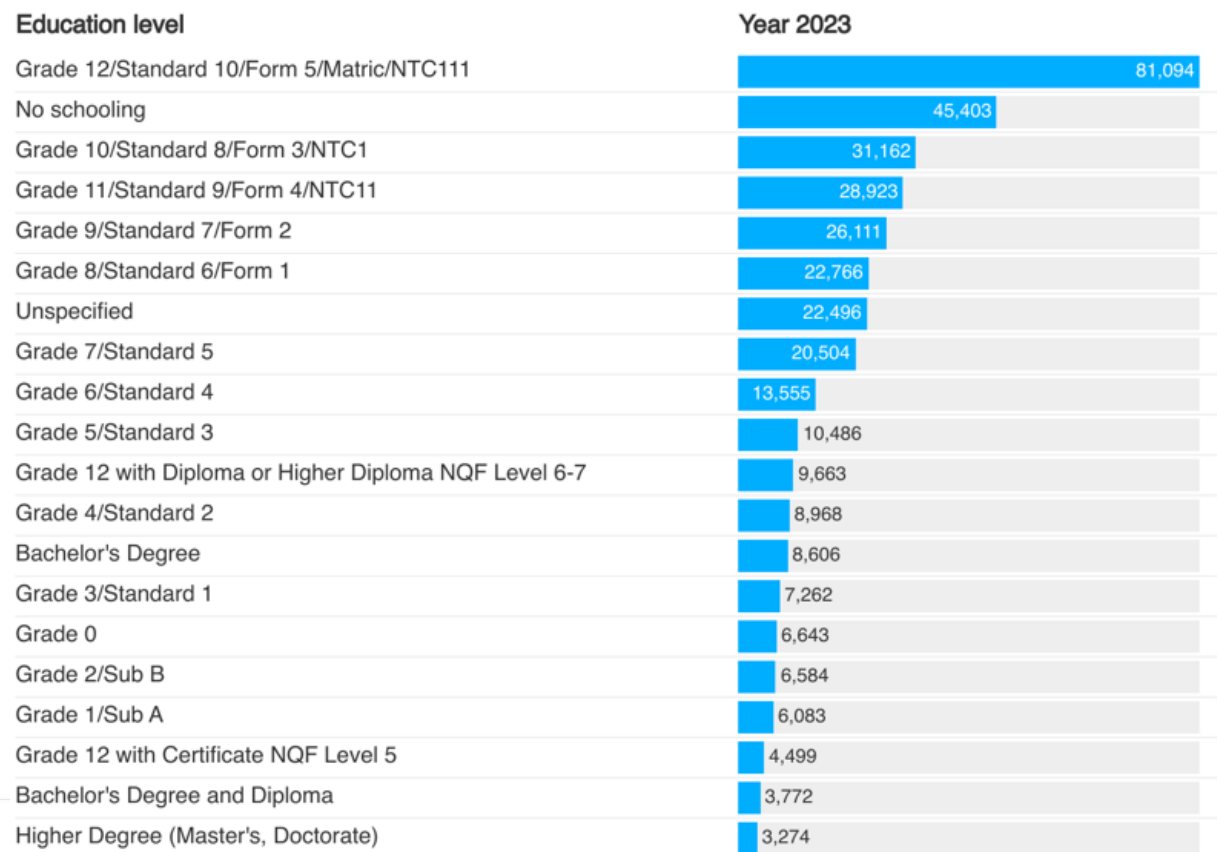
Figure 7: Sub-regional breakdown of the Overberg district's population, 2023



Source: Quantec, 2024

Education levels in the greater Overberg district vary significantly. Figure 8 shows the number of people with different education levels in the district. The largest group, comprising 81,094 individuals, holds a qualification equivalent to Grade 12/Standard 10/Form 5/Matric/NTC11. The second largest group, with 45,403 people, consists of those with no schooling. The smallest group, consisting of 3,274 individuals, holds higher degrees including Master's or Doctorate.

Figure 8: Education levels, Overberg district, 2023

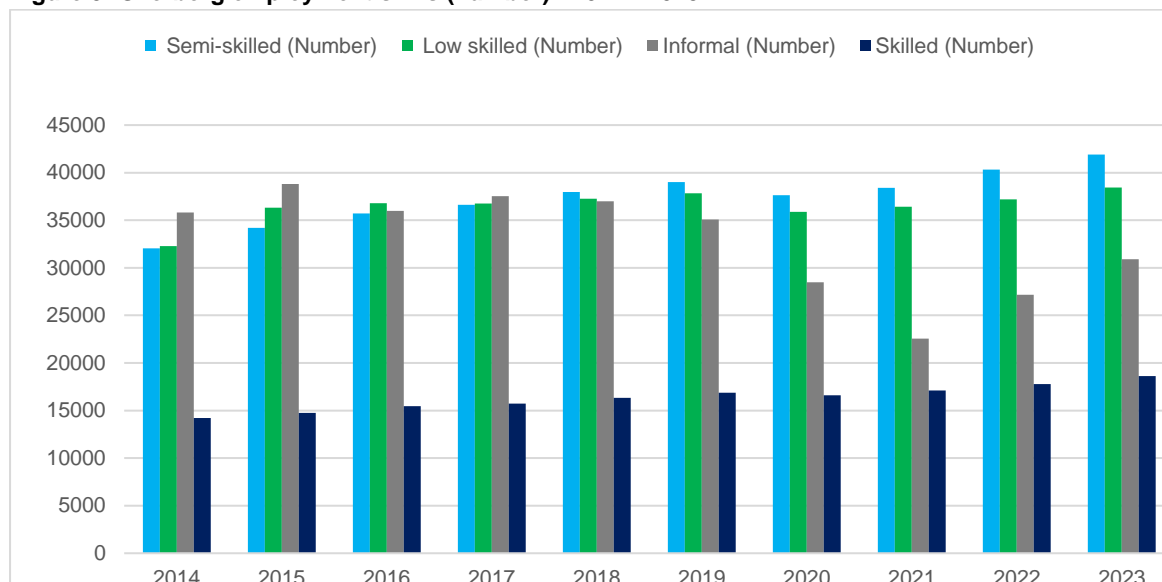


Source: Quantec, 2024

3 Employment

Figure 9 highlights the skill sets amongst the Overberg district's working population. The semi-skilled worker cohort trended higher overall over the period under review and was the largest component of the workforce from 2018 onwards, while the skilled category remained a minority. The skilled category ranked significantly lower throughout the period analysed.

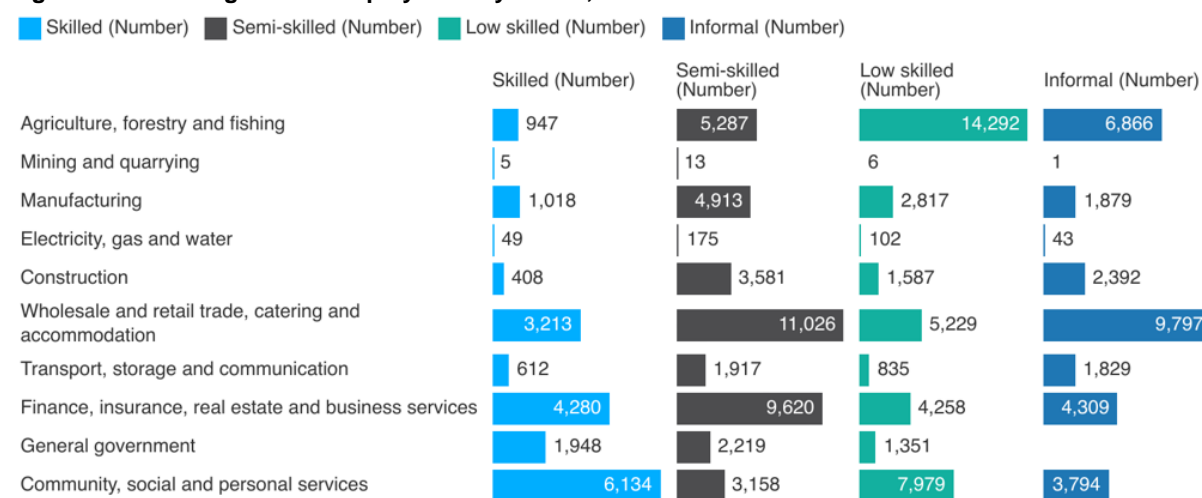
Figure 9: Overberg employment skills (number): 2014 - 2023



Source: Quantec, 2024

Figure 10 presents a breakdown of employment by economic sectors in the Overberg district in 2023. The community, social, and personal services sector employed the most skilled workers, totalling 6,134 individuals. The sectors with the highest numbers of semi-skilled workers were wholesale and retail trade, with 11,026 individuals, and finance, insurance, real estate, and business services, with 9,620 individuals. The agriculture, forestry, and fishing sector predominantly employed those with low skills, at a total of 14,292 workers, while the wholesale and retail trade sector had the largest number of individuals in informal employment, with 9,797 workers.

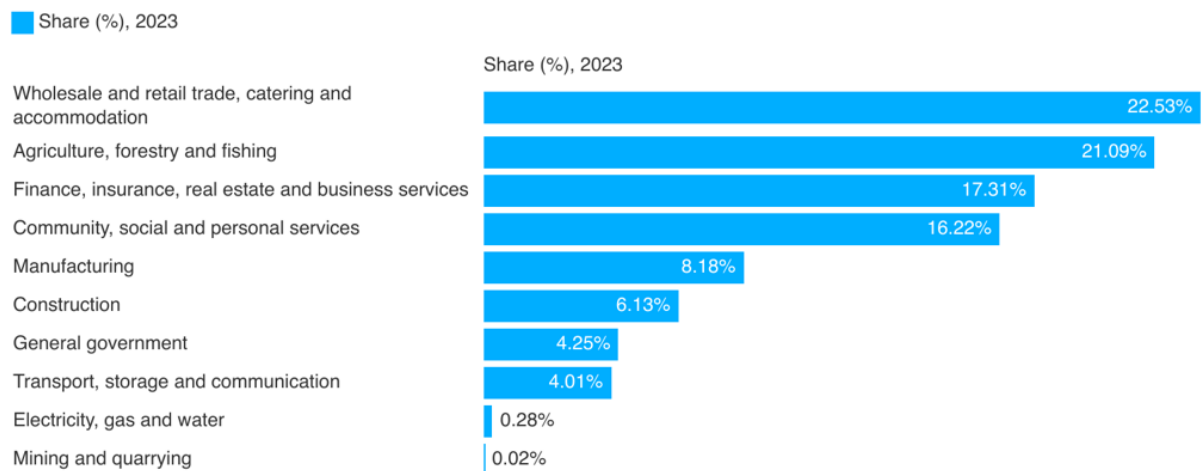
Figure 10: Overberg district employment by sector, 2023



Source: Quantec, 2024

In terms of total employment, the leading sectors were wholesale and retail trade, which employed 22.53% of the workforce, followed by agriculture, forestry, and fishing with a 21.09% share. Finance, insurance, real estate, and business services closely followed in third place, employing 17.31% of the workforce in the Overberg. Together, these sectors accounted for approximately 60.92% of the total employment in 2023.

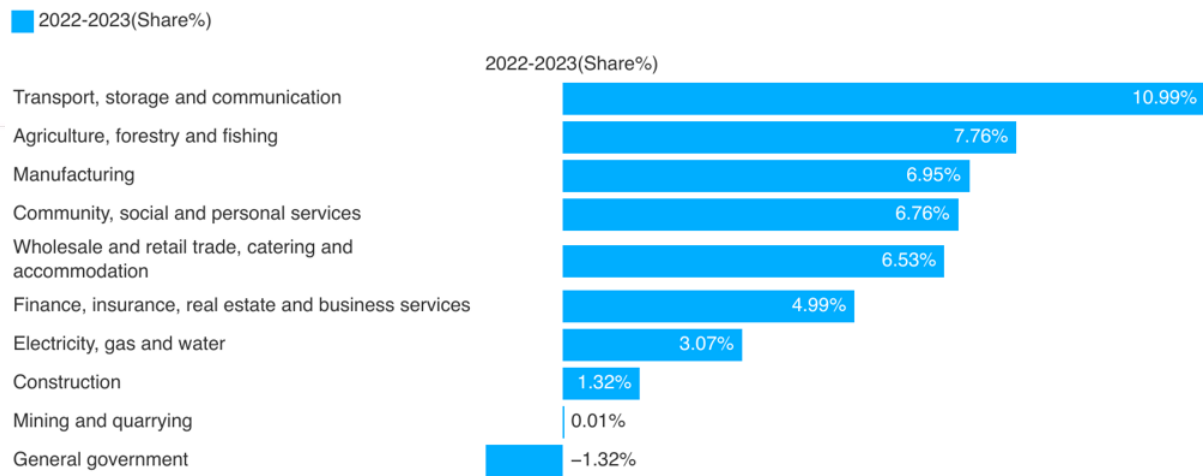
Figure 11: Share of employment by sector, 2023



Source: Quantec, 2024

Besides the general government; community, social, and personal services sector, which saw a 1.32% y-o-y decline in employment rates between 2022 and 2023, all other sectors recorded an increase in employment over this period as reflected in Figure 12. Transport, storage, and communication led the way with a 10.99% y-o-y growth rate, followed by agriculture, forestry, and fishing with a 7.76% y-o-y expansion compared to 2022. The manufacturing sector ranked third, with a 6.95% y-o-y growth rate, increasing from 9,936 individuals in 2022 to 10,627 employed people in 2023.

Figure 12: Changes in employment by sector, 2022–2023



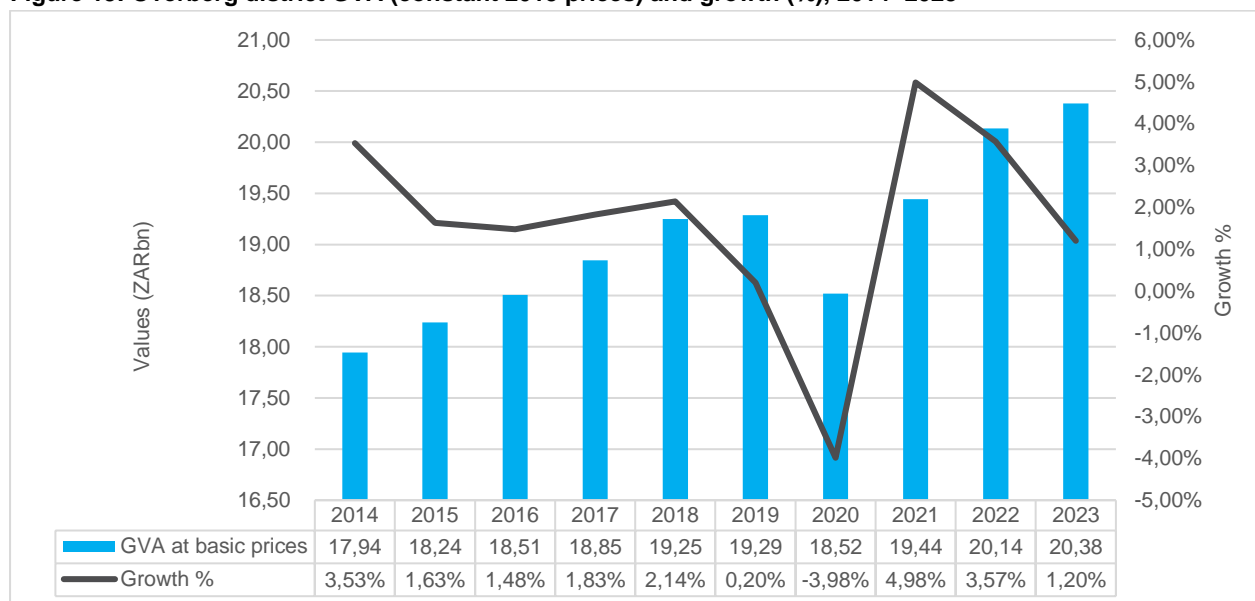
Source: Quantec, 2024

4 Economic Overview

The Overberg district is the fifth largest economy among the six districts of the Western Cape. In 2023, the Overberg district contributed an estimated ZAR20.38bn to the Western Cape economy as measured by real Gross Value Added (GVA) at basic 2015 prices. This represented a contribution of 3.42% to the Western Cape's economy.

In 2023, the Overberg district's economy grew by an estimated 1.20% y-o-y, reaching a value of ZAR20.38bn, up from ZAR20.14bn in 2022. The growth observed from 2021 to 2023 can partly be attributed to the global economy recovering from the impacts of the COVID-19 pandemic, leading to a rebound in economic activities and increased production and services.

Figure 13: Overberg district GVA (constant 2015 prices) and growth (%), 2014–2023



Source: Quantec, 2024

The finance, insurance, real estate, and business services sector was the largest contributor to GVA in this region in 2023, accounting for 27.84% (of the GVA) at a value of ZAR5.67bn. The sector grew by 3.12% between 2022 (ZAR5.50bn) and 2023 (ZAR5.67bn). The wholesale and retail trade, catering and accommodation sector was in second place, representing 15.37% of the region's GVA at a value of ZAR3.13bn, down by 0.97% from the 2022 value of ZAR3.16bn. The manufacturing sector ranked as the third largest contributor to the Overberg district's GVA, accounting for 13.18% (ZAR2.69bn) of the GVA, up by 2.74% from the 2022 value of ZAR2.61bn.

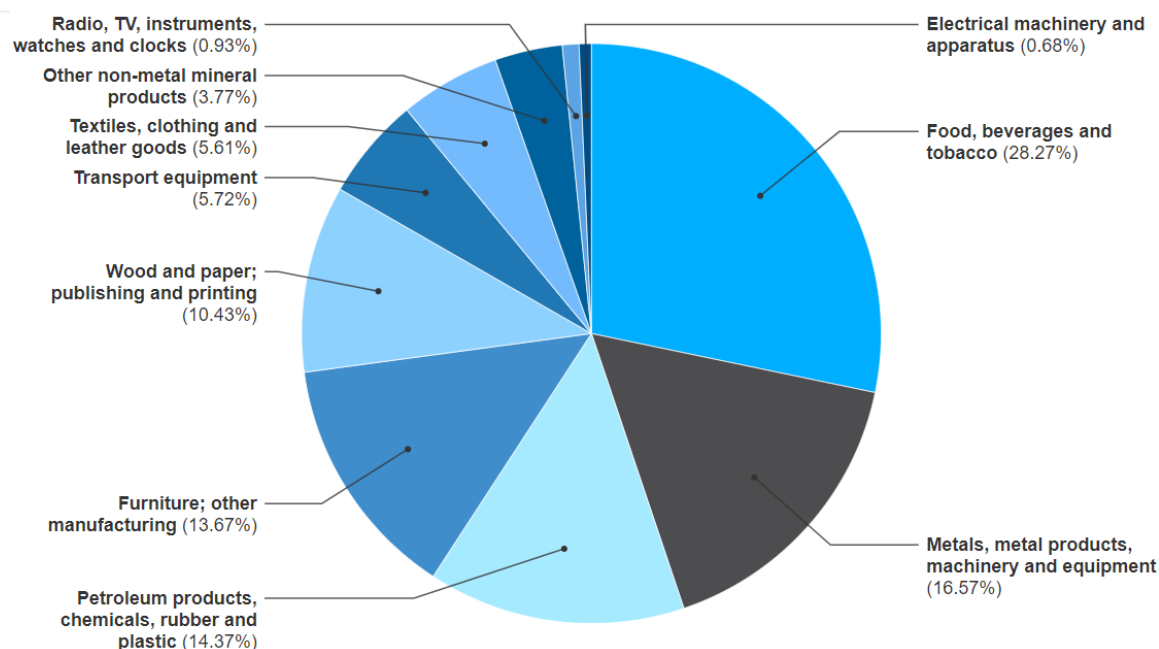
Table 4: Overberg district's GVA per sector, 2022–2023

SECTOR	VALUE 2022 (ZARbn)	VALUE 2023 (ZARbn)	% SHARE OF GDP, 2023	GROWTH RATE %, (2022-2023)
Finance, insurance, real estate and business services	5.50	5.67	27.84	3.12
Wholesale and retail trade, catering and accommodation	3.16	3.13	15.37	-0.97
Manufacturing	2.61	2.69	13.18	2.74
Agriculture, forestry and fishing	2.41	2.28	11.18	-5.51
Transport, storage and communication	2.08	2.23	10.92	6.74
Community, social and personal services	2.03	2.07	10.14	1.69
Construction	1.02	1.02	5.03	0.69
General government	0.94	0.94	4.62	-0.07
Electricity, gas and water	0.36	0.34	1.66	-5.25
Mining and quarrying	0.01	0.01	0.06	-0.03

Source: Quantec, 2024

Figure 14 provides an overview of the composition of the manufacturing sector in the Overberg district in 2023. Food, beverages and tobacco was the largest contributor to the district's manufacturing sector, accounting for 28.27% of GVA. This was followed by the metals, metal products, machinery and equipment manufacturing sub-sector (16.57%); and petroleum products, chemicals, rubber and plastic sub-sector (14.37%).

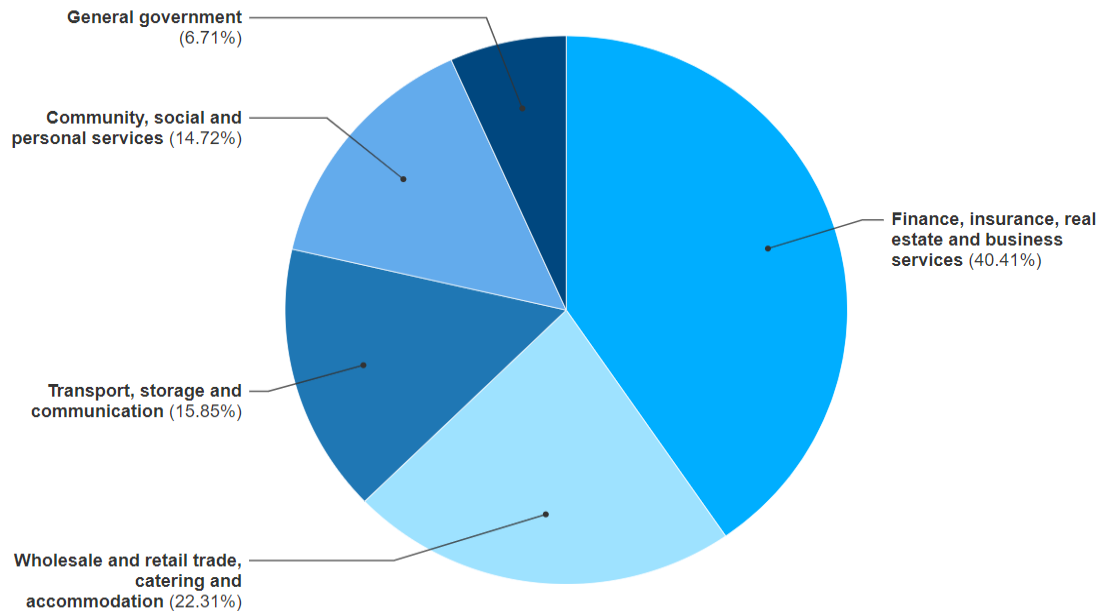
Figure 14: Manufacturing sub-sector contribution to overall manufacturing GVA in the Overberg, 2023



Source: Quantec, 2024 (*values in constant 2015 prices)

Figure 15 provides an overview of the services sector in the Overberg district in 2023. The finance, insurance, real estate and business service sub-sector was the largest contributor to the region's services sector in 2023, accounting for 40.41% of GVA. This was followed by wholesale and retail trade, catering and accommodation (22.31%) and thirdly by the transport, storage and communication (15.85%).

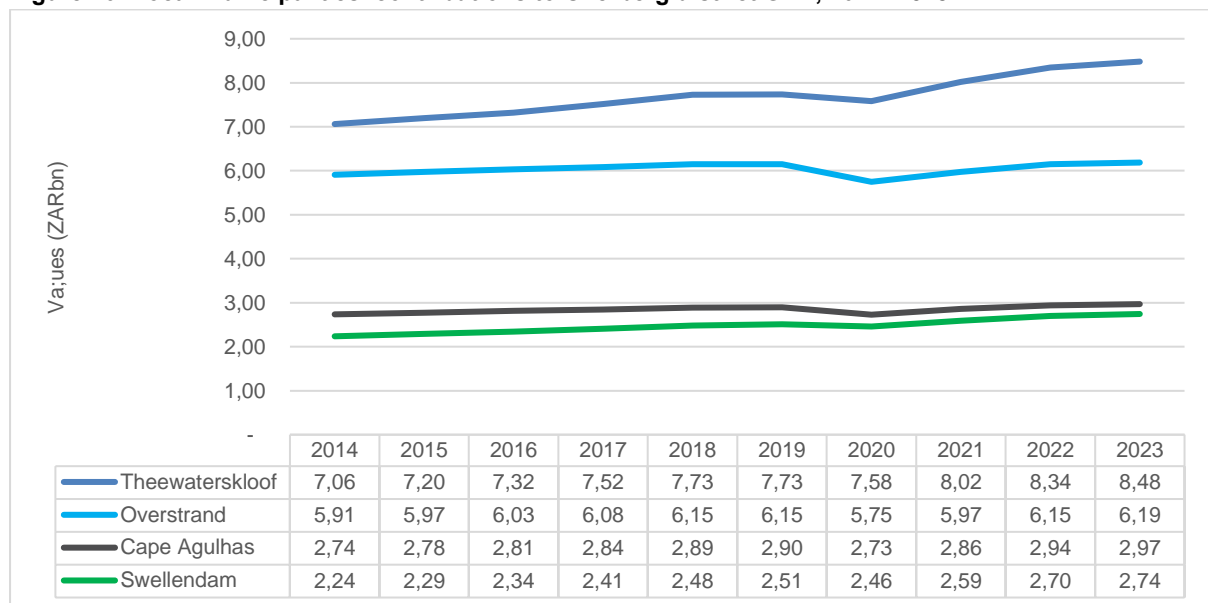
Figure 15: Contribution of the Overberg's services sub-sectors to overall GVA in services, 2023



Source: Quantec, 2024

In terms of individual municipal contributions in the Overberg district, the Theewaterskloof's Municipality was the largest contributor to GVA in 2023, accounting for an estimated 41.62% (ZAR8.48bn of the GVA), followed by the Overstrand at 30.36% (ZAR6.19bn), Cape Agulhas at 14.56% (ZAR2.97bn) and Swellendam at 13.46% (ZAR2.74bn). This can be seen in Figure 16.

Figure 16: Local municipalities' contributions to Overberg district GVA, 2014–2023



Source: Quantec, 2024

Well known for its agricultural activities and outputs, Theewaterskloof municipality has the highest reliance on primary sector activities amongst the municipalities in the district, with 15.62% of its GVA stemming from agriculture, forestry, fishing, and a small amount from mining.. In contrast, Overstrand and Cape Agulhas have a lower dependence on these activities, with the primary sector contributing approximately 7.3% to their GVA, indicating more diversified economies. The Theewaterskloof municipality also has a robust secondary sector, including manufacturing and construction, with this sector accounting for 21.37% of GVA in 2023. Overstrand follows with a 20.05% contribution by the secondary sector to GVA underpinned by a strong manufacturing base that contributes 14.26% to its GVA. Cape Agulhas and Theewaterskloof have similar manufacturing contributions at 13.5% each, while Swellendam has the lowest at 8.87%.

Table 5: Economic Contributions of Primary, Secondary, and Manufacturing Sectors in the Overberg District 2023

	Overberg	Swellendam	Theewaterskloof	Overstrand	Cape Agulhas
Primary sector	11.24%	10.69%	15.62%	7.32%	7.37%
Agriculture, forestry and fishing	11.18%	10.66%	15.59%	7.24%	7.28%
Mining and quarrying	0.06%	0.03%	0.03%	0.08%	0.09%
Secondary sector	19.86%	14.47%	21.37%	20.05%	20.16%
Manufacturing	13.18%	8.87%	13.52%	14.26%	13.93%
Electricity, gas and water	1.66%	1.36%	1.96%	1.41%	1.58%
Construction	5.03%	4.24%	5.89%	4.37%	4.64%
Tertiary sector	68.90%	74.84%	63.01%	72.63%	72.48%
Wholesale and retail trade, catering and accommodation	15.37%	15.60%	14.51%	15.19%	18.01%
Transport, storage and communication	10.92%	9.87%	10.73%	11.49%	11.24%
Finance, insurance, real estate and business services	27.84%	31.69%	23.89%	31.74%	27.45%
General government	4.62%	5.21%	4.37%	4.41%	5.24%
Community, social and personal services	10.14%	12.47%	9.51%	9.79%	10.54%

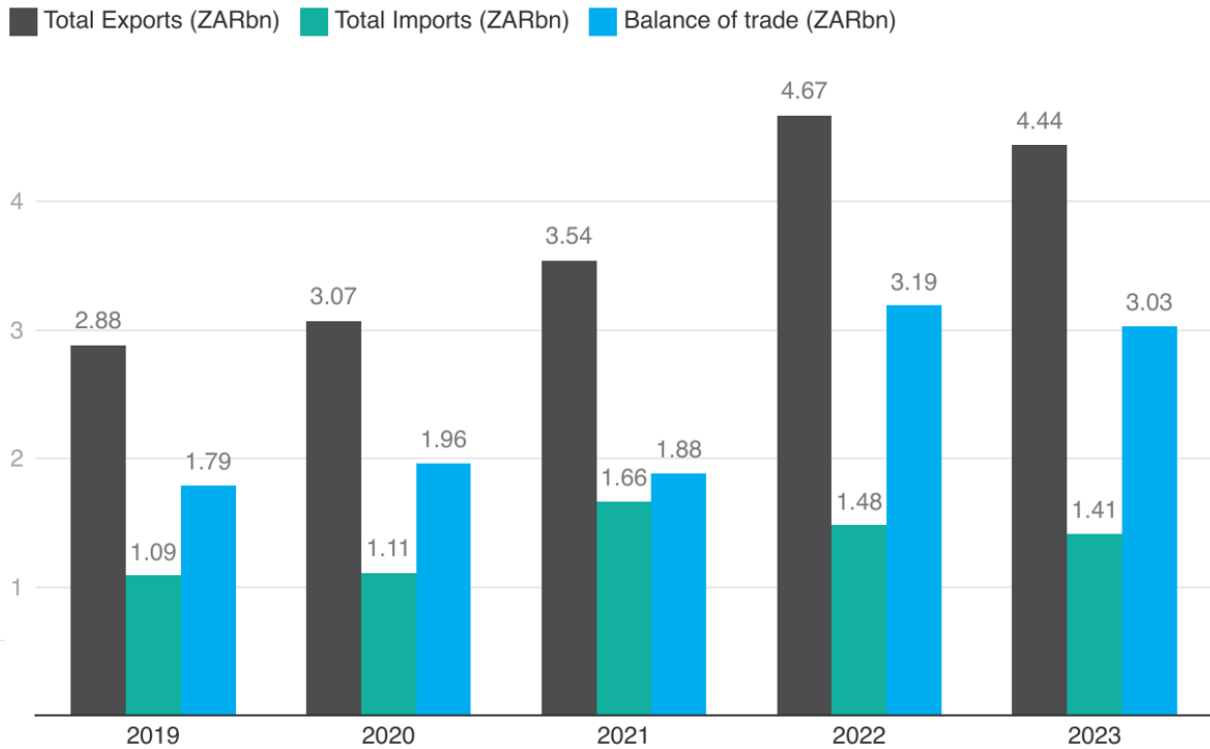
Source: Quantec, 2024

5. Trade

The Overberg district was a net exporter of goods over the 2019–2023 period, with the region exporting goods to the value of ZAR4.44bn in 2023, 4.92% y-o-y lower than the ZAR4.67bn exported in 2022. In turn, import costs eased marginally to ZAR1.41bn in 2023, down from a cost of ZAR1.48bn incurred in 2022. These figures are shown in Figure 17.

Despite variations in the trade balance, the Overberg district consistently maintained a trade surplus throughout the period under review, with the trade balance reaching a high point of ZAR3.19bn in 2022 before easing to a still-strong ZAR3.03bn in 2023.

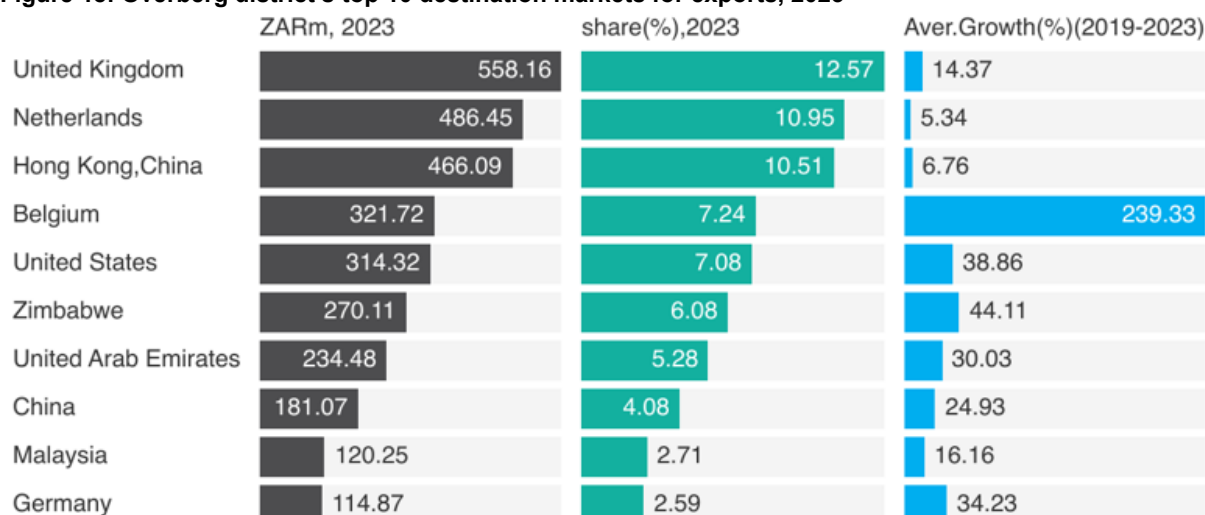
Figure 17: Overberg district's global trade, 2019–2023



Source: Quantec, 2024

In 2023 the United Kingdom was the largest destination market for the Overberg districts' exports at a value of ZAR558.16m, equivalent to 12.57% of total exports as shown in Figure 18. During the five-year period from 2019 to 2023, Belgium was the fastest growing market for exports from the Overberg district with exports growing at a 5-year average annual growth rate of 239.33%. Zimbabwe followed with a growth rate of 44.11%.

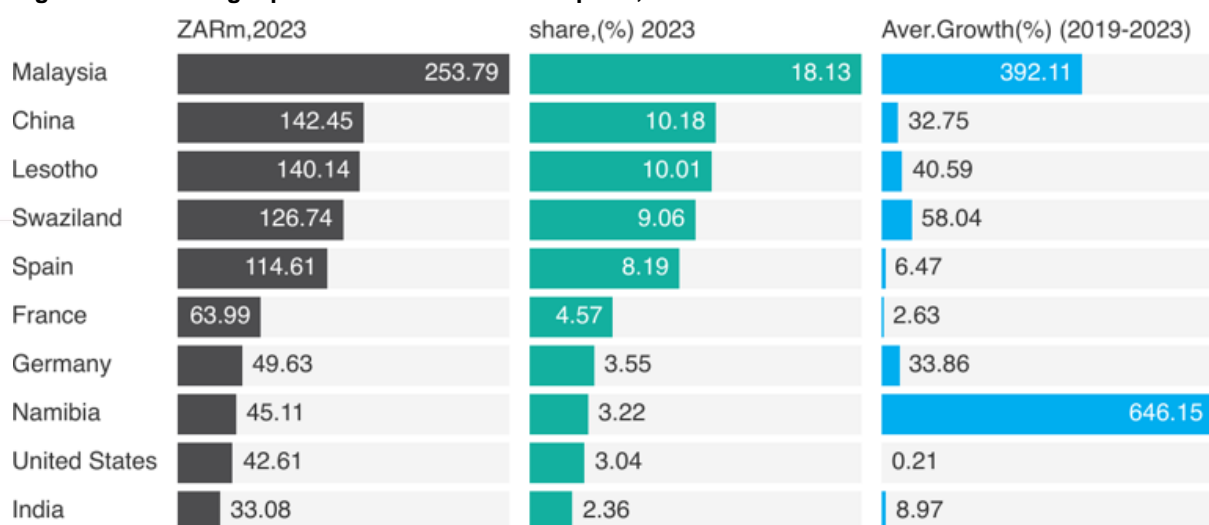
Figure 18: Overberg district's top 10 destination markets for exports, 2023



Source: Quantec, 2024

Figure 19 shows that in 2023, the top three import source markets for the Overberg district were Malaysia (ZAR253.79m), China (ZAR142.45m) and Lesotho (ZAR140.14m). From 2019 to 2023, Namibia was the fastest growing import source market for the Overberg with a 5-year average annual growth rate of 646.15%, followed by Malaysia with an average growth rate of 392.11% per annum over the period under review.

Figure 19: Overberg top 10 source markets for imports, 2023



Source: Quantec, 2022

With export earnings of ZAR1,147m, apples, pears and quinces were the Overberg's leading export product category in 2023, accounting for 25.83% of total export earnings. Molluscs, and other fruits ranked second and third, accounting for 10.52% (ZAR467.27m), and 9.95% (ZAR442.04m) respectively of total export earnings.

Figure 20: Overberg district's top 10 export products (HS4), 2023

ZARm, (2023) Share(%) Avg. Growth(%) (2019-2023)

	ZARm, (2023)	Share(%)	Avg. Growth(%) (2019-2023)
Apples, pears and quinces	1,147.01	25.83	14.81
Molluscs, whether in shell or not	467.27	10.52	16.08
Other fruit, fresh	442.04	9.95	80.45
Wine of fresh grapes	386.69	8.71	10.46
Rape or colza seeds	297.54	6.71	22.59
Fruit juices (including grape must) and vegetable juices	292.42	6.58	2,038.49
Citrus fruit	168.77	3.81	-2.29
Crustaceans, molluscs and other aquatic invertebrates	137.19	3.09	-1.38
Apricots, cherries, peaches (including nectarines)	118.18	2.66	2.29
Foliage, branches and other parts of plants	104.97	2.36	9.18

Source: Quantec, 2024

Flat-rolled products of iron or non-alloy steel dominated the district's import costs, which at a cost of ZAR265.31m accounted for 18.96% of total import costs incurred in 2023. Mixtures of odoriferous substances and mixtures followed at an associated cost of ZAR124.17m, with fish, fresh or chilled at a cost of ZAR83.78m in third place. The Overberg district's top three import products accounted for 33.81% of total imports in 2023. These figures can be seen in Figure 21.

Figure 21: Overberg district's top 10 import products, 2023

ZARm,(2023) Share(%) Avg. Growth(%) (2019-2023)

	ZARm,(2023)	Share(%)	Avg. Growth(%) (2019-2023)
Flat-rolled products of iron or non-alloy steel	265.31	18.96	23.89
Mixtures of odoriferous substances and mixtures	124.17	8.87	151.88
Fish, fresh or chilled	83.78	5.99	210.71
Other colouring matter	62.82	4.49	5.03
Fish, frozen, excluding fish fillets	58.96	4.21	85.51
Video game consoles and machines	44.47	3.18	13.65
Articles for the conveyance or packing of goods	41.07	2.93	12.73
Synthetic organic colouring matter	40.29	2.88	9.51
Leather further prepared after tanning or crusting	28.86	2.06	35.83
Fish fillets and other fish meat (whether or not minced)	27.49	1.96	20.01

Source: Quantec, 2024

5 Investment

5.1 Inward FDI investments

Between January 2003 and May 2014, there was one foreign direct investment worth ZAR79.77m recorded into the Overberg district's food and beverages sector. This investment was made by South African Breweries, a subsidiary of Belgium-based brewing company ABInBev in September 2019. This investment resulted in the creation of an estimated 16 jobs. (fDi Markets, a service from The Financial Times (2024). All Rights Reserved).

5.2 Growth opportunities

5.2.1 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.

5.2.2 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 globally exported. The availability of cold-chain facilities and well-maintained road infrastructure are some of the key aspects that will strengthen this sector.

5.2.3 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.

5.2.4 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 (Overberg District Municipality, 2023).

6 Companies in the Overberg district

Table 6 lists the companies operating in the Overberg district.

Table 6: 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

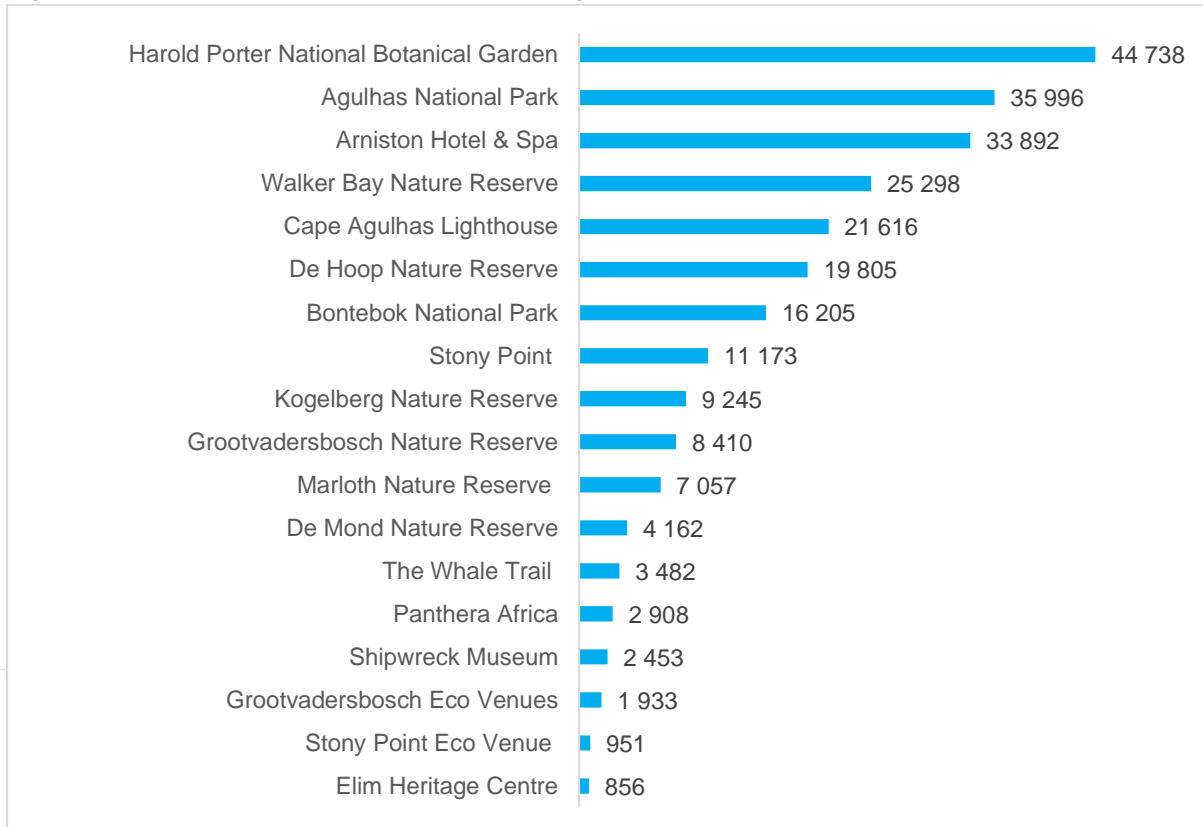
Source: *Who Owns Whom, 2024, Wesgro's Top 100 Exporters, Overberg District Municipality, 2022*

7 Tourism

7.1 Performance of Overberg district attractions

The number of visitors to attractions in the Overberg decreased between January and December 2023 in relation to the same period in 2022. The 18 participating Overberg attractions recorded a combined total of 250,180 visitors between January and December 2023, as shown in Figure 22. This represented a decrease of 12.15% in visitor numbers when compared to the same period in 2022 (284,786). However, there was an 82.67% recovery rate compared to the same period in 2019 (Jan–Dec).

Figure 22: Total number of visitors to the Overberg attractions, Jan–Dec 2023



Source: SANParks, Panthera Africa | Big Cat Sanctuary, L'Agulhas and Hangklip/Kleinmond Tourism Offices (2024)

Among all the participating attractions, six recovered fully for the period January–December 2023, when compared to the corresponding period in 2019. These attractions included the Whale Trail, Grootvadersbosch Nature Reserve, Kogelberg Nature Reserve, Marloth Nature Reserve, Walker Bay Nature Reserve and Panthera Africa. Table 7 shows that the following were the top 5 attractions with the highest year-on-year growth rates compared to January–December 2022:

1. Walker Bay Nature Reserve (45.68%)
2. Agulhas National Park (32.12%)
3. Marloth Nature Reserve (28.38%)
4. De Hoop Nature Reserve (15.68%)
5. Panthera Africa (9.61%)

Table 7: Annual performance of Overberg attractions, Jan–Dec 2023

Overberg Attractions	2022/2023 % Change	2019/2023 % Recovery
1. Agulhas National Park	32.12%	88.77%
2. Bontebok National Park	-1.04%	72.13%
3. Cape Agulhas Lighthouse	-2.22%	62.54%
4. Harold Porter National Botanical Garden	-1.87%	103.10%
5. Shipwreck Museum	-37.98%	29.95%
6. Panthera Africa	9.61%	57.91%
7. Grootvadersbosch Nature Reserve	-7.29%	152.33%
8. Marloth Nature Reserve	28.38%	127.02%
9. Walker Bay Nature Reserve	45.68%	178.61%
10. De Hoop Nature Reserve	15.68%	75.09%
11. De Mond Nature Reserve	-22.51%	79.01%
12. Kogelberg Nature Reserve	-9.17%	137.00%
13. Stony Point	-80.61%	13.19%
14. The Whale Trail	-11.53%	9672.22%

Source: SANParks, CapeNature, Panthera Africa | Big Cat Sanctuary, L'Agulhas and Hangklip/Kleinmond Tourism Offices (2024)

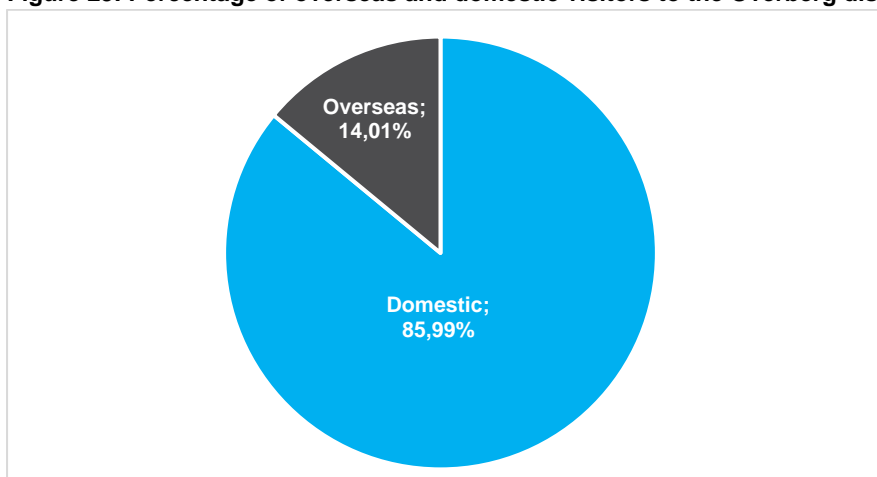
Note: No data was collected for Arniston Hotel & Spa, Elim Heritage Centre, Stony Point Eco Venue and Grootvadersbosch Eco Venues in 2019, hence not included in this table.

7.2 Overberg district's visitor trends & patterns

7.2.1 Origin of visitors

The domestic market accounted for the largest share of respondents (85.99%) who visited the region between January and December 2023, whereas 14.01% of respondents were overseas travelers. This can be seen in Figure 23.

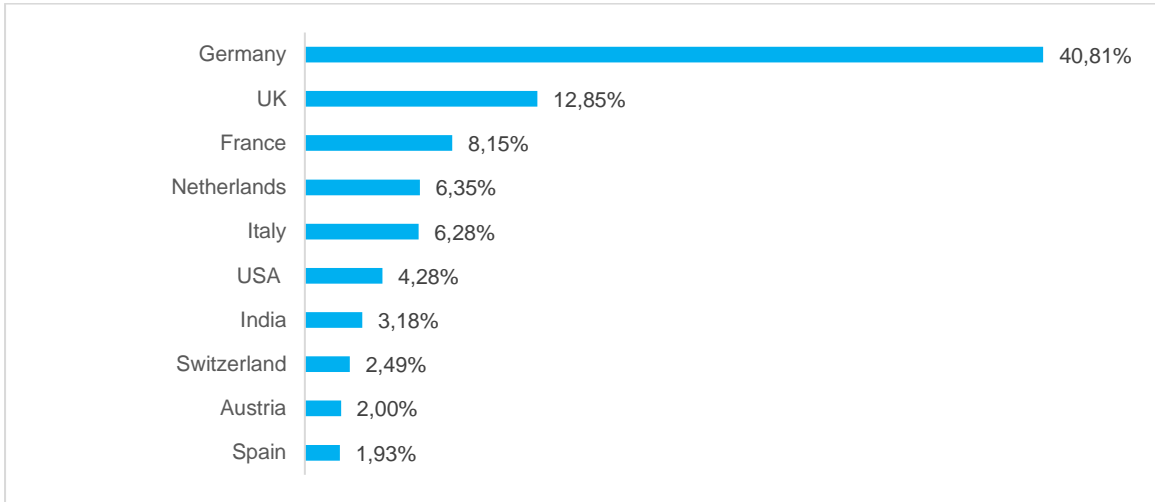
Figure 23: Percentage of overseas and domestic visitors to the Overberg district, Jan–Dec 2023



Sources: Wesgro Regional Visitor Tracking Surveys (2023).

The figure below highlights the top global visitors to the Overberg over the period January to December 2023. Figure 24 shows that 40.81% of overseas travellers to the Overberg originated from Germany, followed by visitors from the UK (12.85%), and those from France (8.15%).

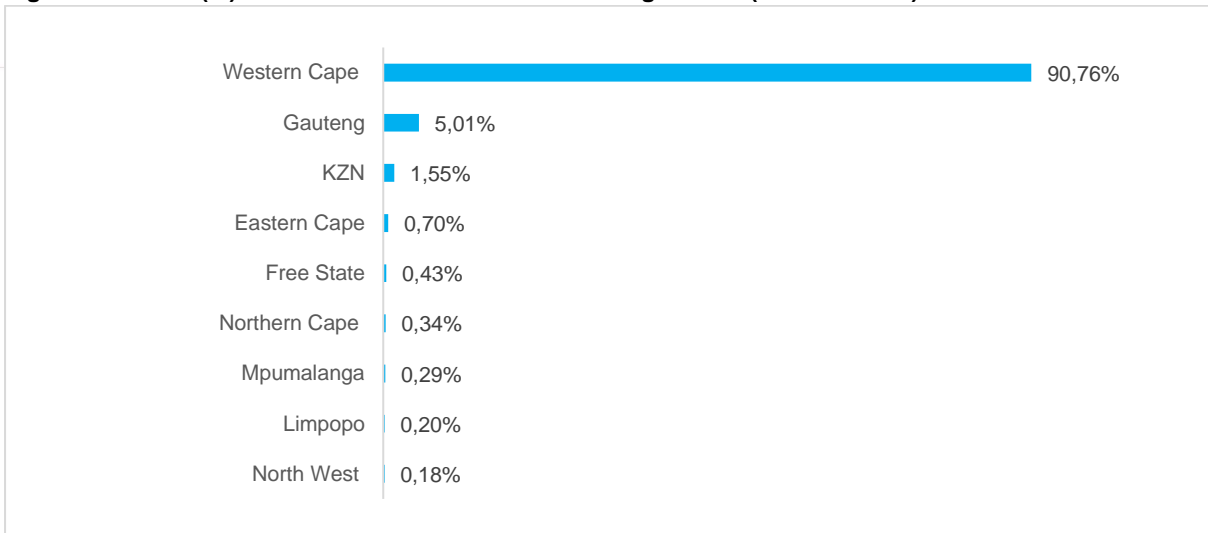
Figure 24: Share (%) of international visitors to the Overberg district (Jan-Dec 2023)



Source: Wesgro Regional Visitor Tracking Surveys (2023)

Despite financial and economic constraints, trends indicate that domestic travellers continue to travel. Figure 25 shows that from January to December 2023, the largest share of domestic travellers to the region came from the Western Cape (90.76%) which indicates that the Overberg district is a popular destination for locals in the province. Gauteng and KwaZulu-Natal accounted for 5.01% and 1.55% respectively of domestic tourists into the region.

Figure 25: Share (%) of domestic visitors to the Overberg district (Jan-Dec 2023)



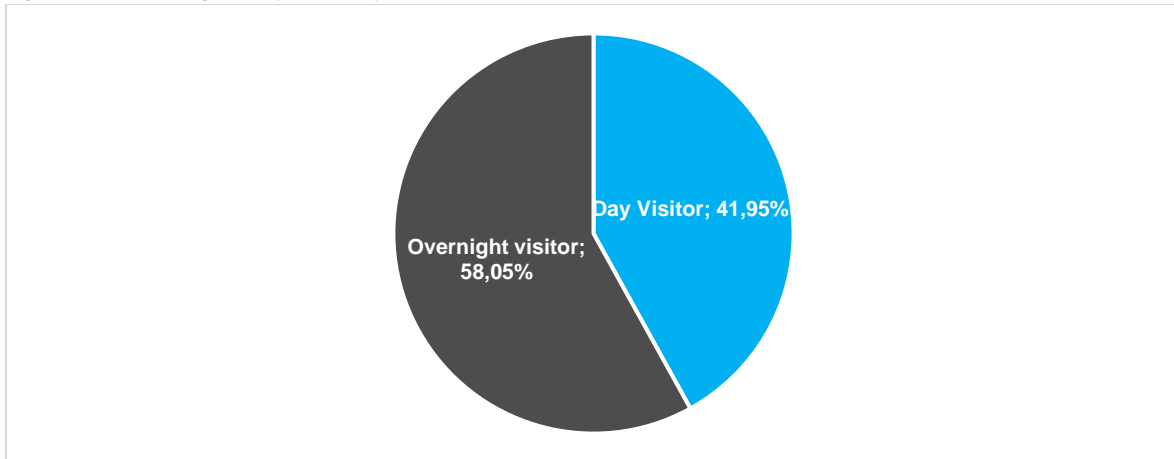
Source: Wesgro Regional Visitor Tracking Surveys (2023)

7.2.2 Overnight stay and day visits

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.

Between January and December 2023, 58.05% of visitors stayed overnight in the Overberg and 41.95 % took day trips. This can be seen in Figure 26.

Figure 26: Overnight stay and day visitors (Jan-Dec 2023)



Source: Wesgro Regional Visitor Tracking Surveys (2023)

7.2.3 Purpose of visit

Most of the visitors (70.59%) travelled to the region primarily for leisure/holiday and 17.23% visited friends and relatives. Some came for business (5.94%) and events/festivals (3.22%), whereas a small percentage visited for purposes of medical/health (1.65%). This is shown in Figure 27.

Figure 27: Reasons for visiting the Overberg district, Jan – Dec 2023

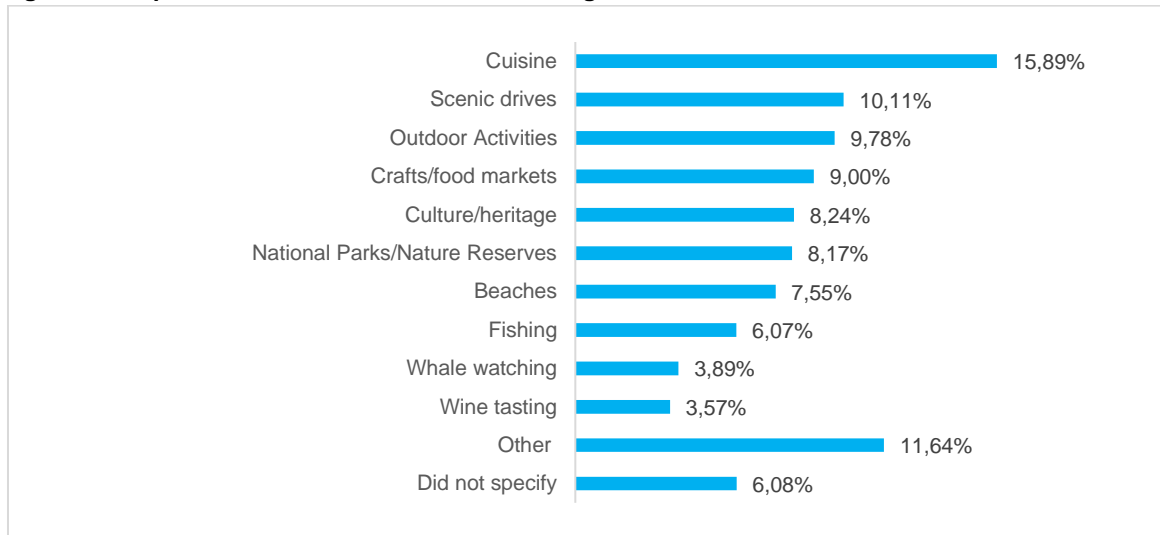


Source: Wesgro Regional Visitor Tracking Surveys (2023)

7.2.4 Top visitor activities in the Overberg district

The Cuisine activity by 15.89% topped as the most undertaken activity followed by Scenic drives and Outdoor activities at 10.11% and 9.78% respectively. Figure 28 below highlights the top activities undertaken in the Overberg district.

Figure 28: Top activities undertaken in the Overberg district



Source: Wesgro Regional Visitor Tracking Surveys (2023)

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 great white sharks. 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 8: 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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