



**Western Cape  
Government**

Agriculture



**Western Cape Agricultural Sector Profile**

**2018**

## Western Cape Agricultural Sector Profile: 2018

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## EXECUTIVE SUMMARY

The purpose of this report is to provide a comprehensive and annually updated overview of the Western Cape Agricultural Sector. The aim is to highlight the key trends shaping the sector and analyse these changes in the context of the current economic and policy climate.

The Western Cape Province, consisting of twenty five municipalities grouped into six districts, is the fourth largest province in South Africa in terms of land area. It is home to almost 12% of the national population, with majority of them residing in the City of Cape Town Metropole.

The impact of various natural disasters over the past three seasons have seriously impacted on agricultural investment and production. Investment in the Western Cape's Agriculture, Forestry and Fisheries sector has declined in real terms from R4.6 billion in 2007 (2017 prices) to R4.1 billion over the proceeding ten years to 2017. Over this period the province's contribution to the national economy also dropped slightly, but the Western Cape's Gross Value-Added (GVA) was still growing steadily from R497 billion in 2007 (2017 prices) to R567 billion in 2017. The three biggest economic sectors contributing to GVA are business services; trade and hospitality; and manufacturing. Agriculture's contribution currently accounts for 3.9% of the provincial economy and employs 12.3% of the entire labour force in the province.

The West Coast and Cape Winelands districts account for approximately 58% of the Western Cape's Agricultural GVA. The bulk of forestry value added is from the Eden district, whilst the City of Cape Town alone account for 60% of Food and 64% of Beverages & Tobacco GVA. In terms of land-use, the recently completed flyover project's information reveals that of the total crops planted, 69% was grains and oilseeds, followed by vegetables (10%), orchards (9%) and tea and hops (3%). The major specific crops produced in the province in terms of area planted are wheat, wine grapes, canola and barley. At national level, the Western Cape agricultural output is quite substantial compared to other provinces

In terms of trade the province has increased its real trade balance from R18 billion to R21 billion in over the past decade (all 2017 prices). The domestic market has also responded positively in the form of increased demand for agricultural production as the number of households have been on the increase. However, much still needs to be done to address a 3% increase in the number of households experiencing adult hunger over the ten year period, and a 1.5% increase in those that experience child hunger.

Gains in agricultural employment up until 2015 have been somewhat eroded in the face of the recent drought as evidenced by a significant decline in seasonally adjusted provincial employment in the Western Cape's Agricultural, Forestry and Fisheries Sector. By the end of 2015 employment in the sector totalled 232 319, but this fell to 187 044 by the end of 2017. The gains made prior to the drought should be highlighted by the fact that despite this contraction employment still stands higher than it ever was prior to 2015.

In the following chapters, this report delves into more detail on key issues of relevance to the province's agricultural sector. This includes agricultural production, agricultural land markets, international trade, the domestic markets, employment, subsistence farming, infrastructure, investment and agri tourism.

## 1. OVERVIEW OF THE WESTERN CAPE

The Western Cape (WC) is one of South Africa's nine provinces, situated on the South West coast of the country with a long coastline. The province is made up of 25 municipalities grouped into 6 Districts. The borders of these municipalities are shown in Figure 1 below.

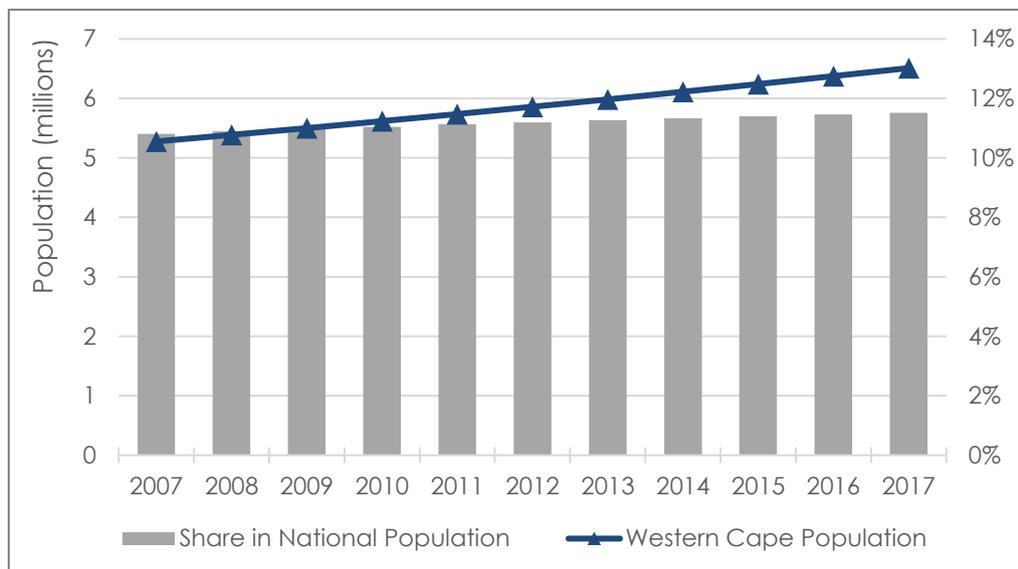


**Figure 1: Area Map of the Western Cape (WC)**

*Source: WCDoA (2019)*

The WC is markedly different from the rest of South Africa as far as agriculture is concerned. Historically, ample and reliable winter rainfall along with well-developed production and processing infrastructure has allowed stable production of a unique mix of agricultural produce. The diversity of production reflects the diverse landscape of the province which features high mountain regions, lush valleys, coastal regions and semi-desert areas (Vink & Tregurtha, 2005).

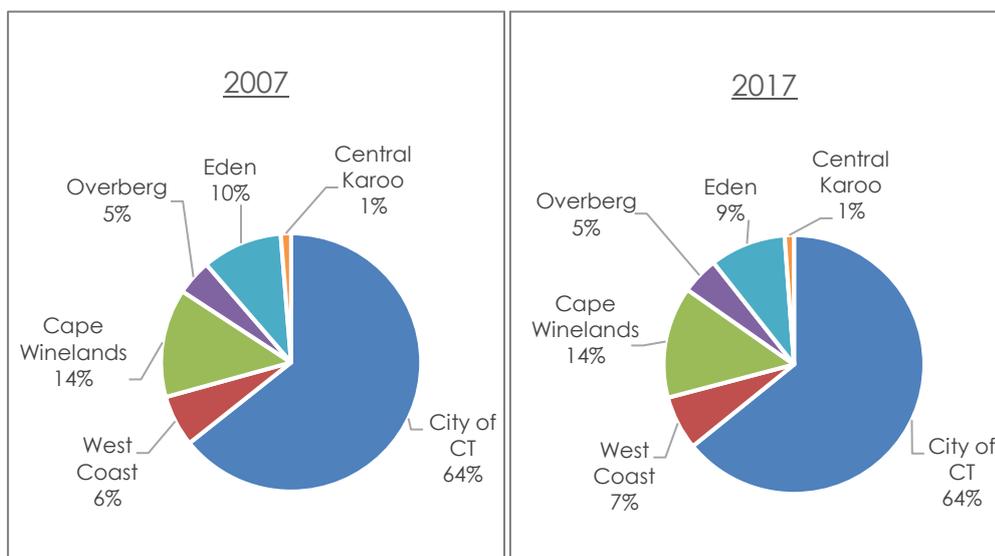
A total of 6.5 million people were reported to reside in the WC in 2017, almost 12% of the national population. Figure 2 shows how the provincial population has grown, both in absolute and relative terms compared to the national population. In 2007 the WC population was only 5.3 million which was then less than 11% of the national population. In addition to the need to provide more employment opportunities, the province's large and growing population also places a strong demand on the agricultural sector in order to be able to feed the population. Without an increase in agricultural production, the increase in the population will lead to growing food insecurity in the province.



**Figure 2: WC Absolute and Relative Population, 2007-2017**

*Data Source: Quantec (2018)*

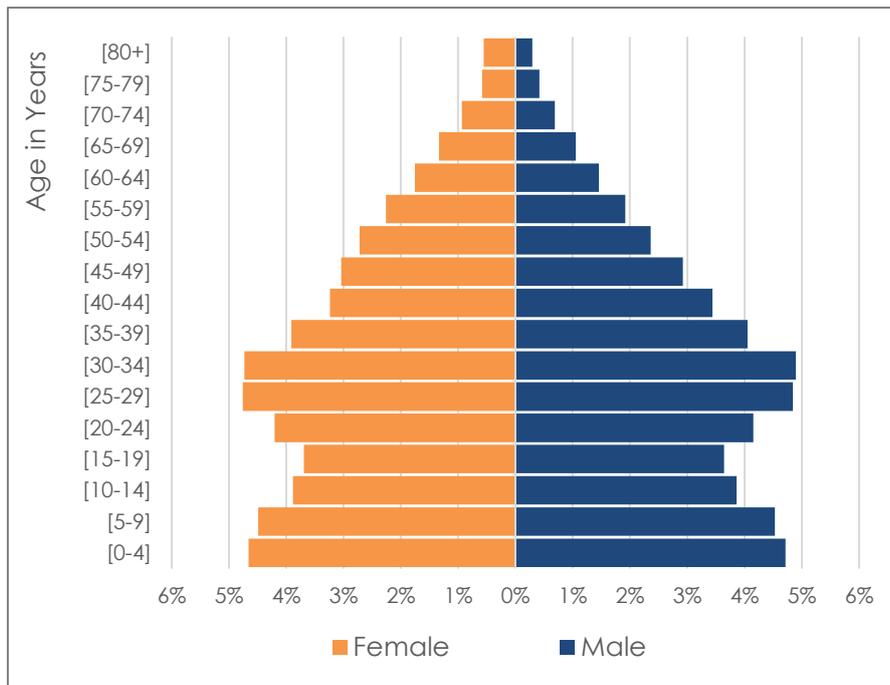
The majority of the province's population reside in the Cape Town metropole area (64%). As can be observed in Figure 3, the relative breakdown of the population has stayed pretty much constant over the past decade, with the population of the West Coast growing a bit faster than the rest of the province and that of Eden growing slightly slower.



**Figure 3: WC Population by District, 2007 vs 2017**

*Data Source: Quantec (2018)*

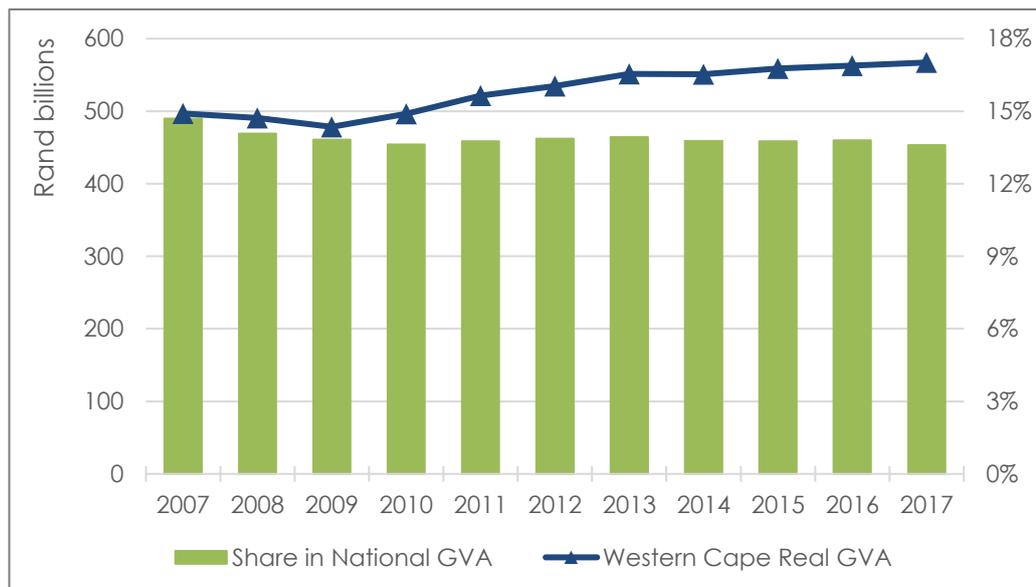
Figure 4 breaks down the WC population in 2017 by age and gender. The province has slightly more females than males, with the female share of the population standing at 51%. In terms of age groups, a large portion of the population fall between the ages of 25 and 34, these two cohorts together accounting for almost one fifth (19.2%) of the total population.



**Figure 4: WC Population by Age & Gender, 2017**

Data Source: Stats SA (2018a)

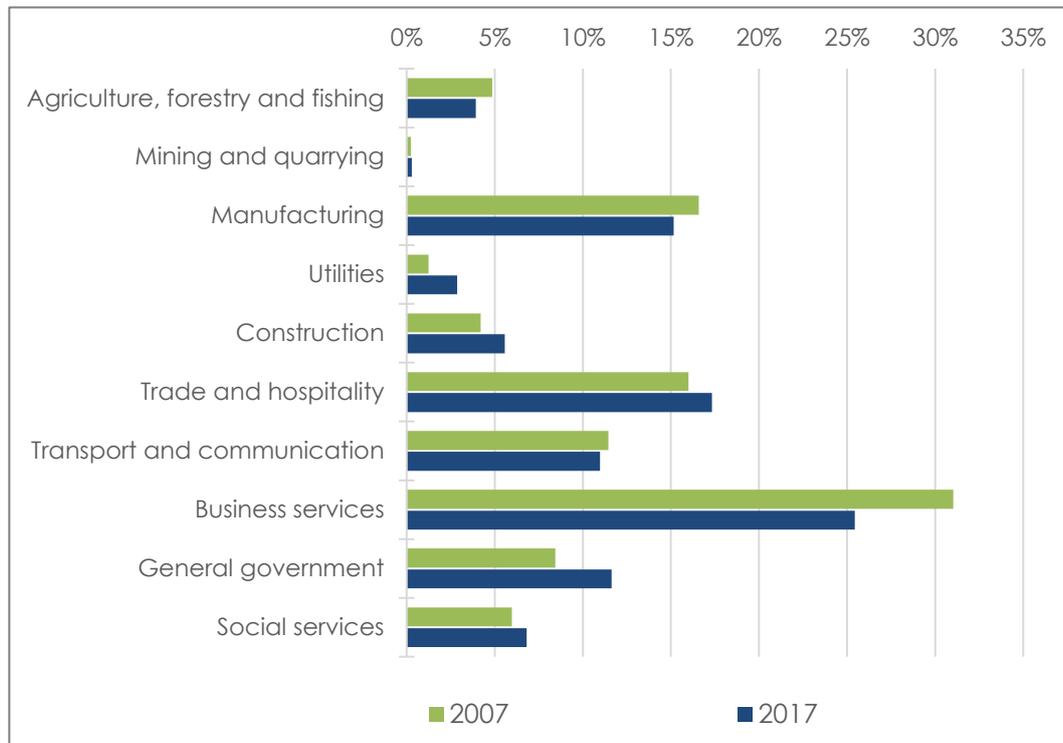
The WC economy has been growing in real terms over the past decade, albeit at a slow pace. As illustrated in Figure 5, in 2007 the Gross Value Added (GVA) in the WC economy was equivalent to R497 billion when converted into 2017 prices. Real growth of 1.3% per annum has resulted in this increasing to R567 billion in 2017. This growth was slower than what was experienced in the rest of South Africa and as a result the province's share in the national economy fell from 14.7% to 13.6% over the ten year period.



**Figure 5: WC Real Gross Value Added (2017 prices), 2007-2017**

Data Source: Quantec (2018)

Figure 6 shows the sectoral breakdown of GVA in the WC economy. The largest sector in the WC economy is business services, accounting for approximately a quarter of all economic activity. This is despite a significant drop in the share from 2007 when it stood at 31%. Agriculture, Forestry and Fisheries make up a smaller part of economic activity in the province, accounting for 3.9% in 2017, down from 4.9% in 2007.



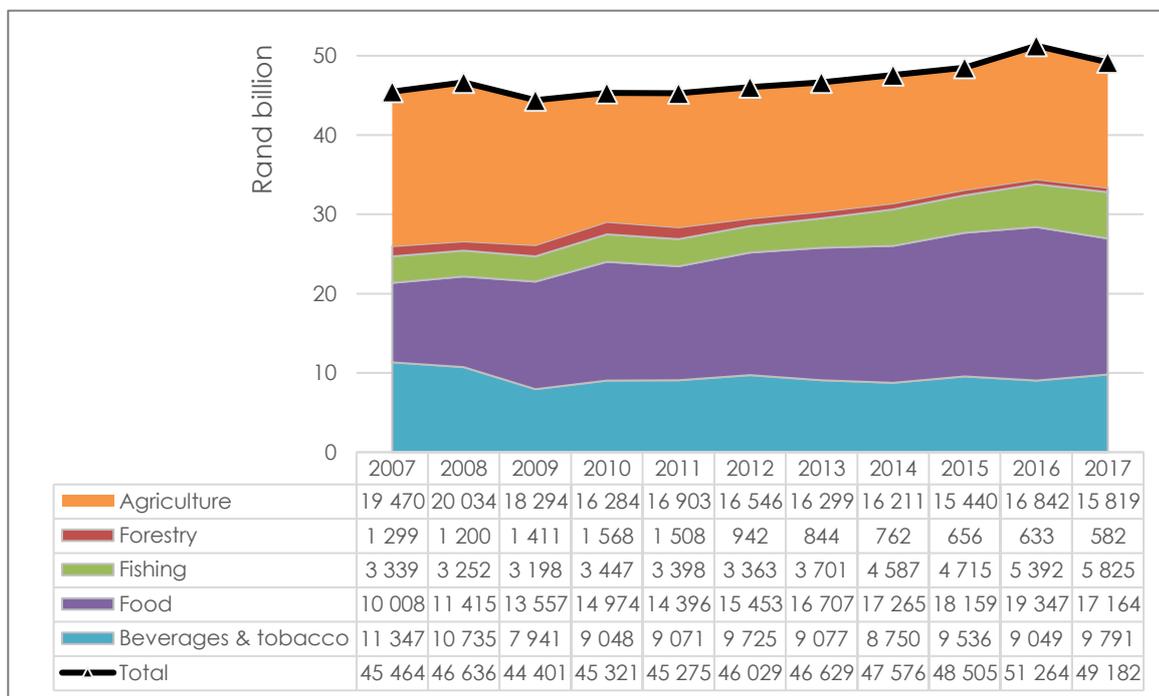
**Figure 6: Sectoral Contributions to WC GVA, 2007 vs 2017**

*Data Source: Quantec (2018)*

## 2. AGRICULTURAL PRODUCTION

Even before the recent drought in South Africa, the performance of the national Agricultural Sector has not managed to reach the levels required in order to achieve the country's development aspirations (BFAP, 2018). A recent report by the World Bank (2018) even cites the poor performance of the sector as one of the main contributors to the country slipping into a recession. The poor performance has been further exasperated through the recent drought and whilst there appears to be a recovery in the sector at the national level (RSA National Treasury, 2018), the delay in rains to the Western Cape have meant that performance of the provincial sector has remained poor (WC Provincial Treasury, 2018).

Taking a broader view of agriculture to also include agri processing activities in the food, beverages and tobacco sector<sup>1</sup>, Figure 7 shows total real GVA, broken down by sub-sectors. Of the five sub sectors, agriculture was comfortably the largest in 2007 where it accounted for 43% of total GVA across the subsectors. However value added in agriculture has experienced a real decline since 2007. Falling at an average annual rate of 2.1% has meant that agriculture's share fell to 33% by 2017. The food subsector grew rapidly over this period, with real growth of 5.67% per annum. This growth rate was surpassed only by the fisheries sector which grew at 5.7% per annum but from a much smaller base. The strong growth in the food subsector propelled it to becoming the largest sector across the five agriculture and agri processing sub sectors looked at. In 2017 the share in the food subsector accounted for 35% of total gross value added, up from 22% in 2007.

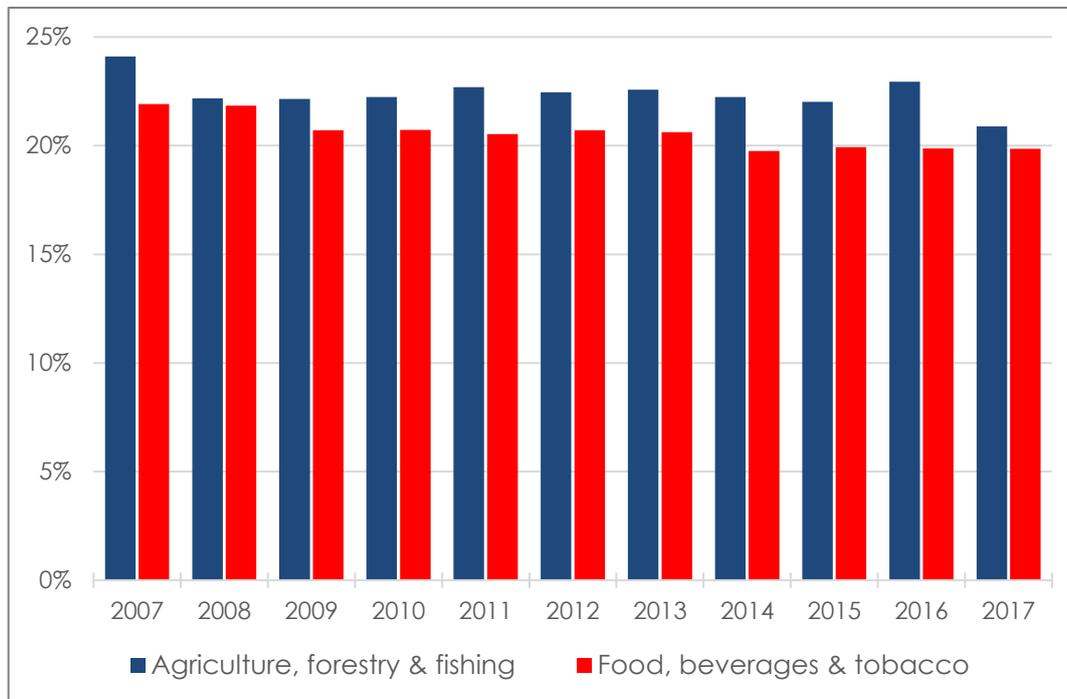


**Figure 7: Real GVA in Agriculture and Agri Processing (2017 prices), 2007-2017**

Data Source: Quantec (2018)

<sup>1</sup> Whilst it is acknowledged that agri processing encompasses more than just food, beverages and tobacco, it is not possible to differentiate products such as textiles and furniture based on whether or not they are made up of agricultural materials or not. For this reason the analysis is restricted to only the food, beverages and tobacco sector (which is also a far more significant sector than other sectors which have agri processing components)

The WC is responsible for a large share of national output in both Agriculture, Forestry and Fisheries (AFF), as well as Food, Beverages and Tobacco (FBT). This is evident in Figure 8 which shows the WC's share in national GVA for the two sectors. Both sectors show a gradual trend downwards suggesting the province's output in these sectors moves in line with what is happening on a national scale, albeit it at a slightly lower growth rate. In 2017 the WC accounted for 21% of national AFF GVA and 20% of national GVA from FBT.



**Figure 8: WC Share in Real National AFF and FBT GVA, 2007-2017**

*Data Source: Quantec (2018)*

Geographically agricultural activity is the most concentrated in the Cape Winelands, accounting for 34% of the all provincial GVA. As the geographic breakdown of agricultural GVA in Table 1 shows, this 34% is quite evenly distributed over the five local municipalities. The West Coast is the next biggest contributor with 24%, followed by the City of Cape Town Metropole with 18%.

The share of activity within the Cape Metropole seems reasonably high given the perceived concentration of agricultural activities in rural areas where land for cultivation is more readily available and less susceptible to the various pollutants which tend to result from urban commercial and residential activities. The high share is due to the important activities which take place in the peri-urban areas on the outskirts of the Cape Metropole, such as the Phillipi Horticulture area. These areas have been facing increasing encroachment of the built up areas around them and increasing competition for the land they utilise to be used for various non-agricultural uses. Despite these challenges, these areas have provided a critical source of food and nutrition security for local residents as well as being a significant source of fresh produce to the City of Cape Town (Battersby-Lennard & Haysom, 2012; City of Cape Town, 2012).

Outside of primary agriculture as production depends less dependent on land, industries tend to have a higher concentration in the Cape Metropole. It is responsible for the largest share in all of the forestry (35%), fisheries (49%), food (60%) and beverages and tobacco (64%) subsectors.

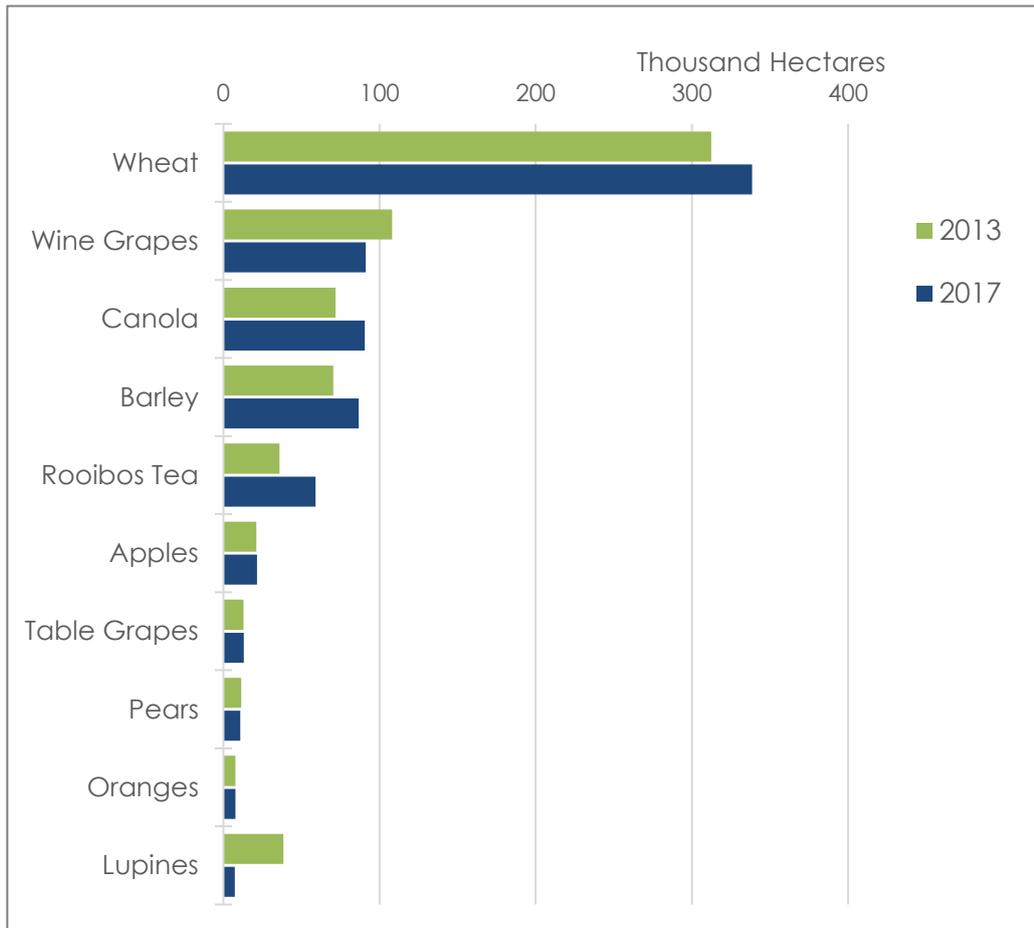
**Table 1: Geography of WC Agricultural GVA, 2017**

	<b>Agriculture</b>	<b>Forestry</b>	<b>Fisheries</b>	<b>Food</b>	<b>Beverage &amp; Tobacco</b>
<b>City of Cape Town</b>	<b>17.5%</b>	<b>34.6%</b>	<b>49.3%</b>	<b>59.8%</b>	<b>63.7%</b>
City of Cape Town	17.5%	34.6%	49.3%	59.8%	63.7%
<b>West Coast</b>	<b>24.4%</b>	<b>10.0%</b>	<b>32.2%</b>	<b>15.4%</b>	<b>11.5%</b>
Matzikama	5.8%	1.8%	0.8%	1.1%	1.4%
Cederberg	3.7%	1.1%	4.1%	2.2%	0.6%
Bergrivier	6.2%	3.0%	2.9%	3.1%	0.7%
Saldanha Bay	1.6%	0.5%	23.7%	3.7%	5.2%
Swartland	7.1%	3.6%	0.8%	5.2%	3.7%
<b>Cape Winelands</b>	<b>33.9%</b>	<b>17.6%</b>	<b>6.4%</b>	<b>13.1%</b>	<b>17.6%</b>
Witzenberg	7.6%	5.3%	1.4%	2.4%	1.3%
Drakenstein	8.2%	5.1%	1.6%	3.7%	7.1%
Stellenbosch	4.9%	4.8%	1.4%	2.7%	5.3%
Breede Valley	7.9%	1.6%	1.4%	2.3%	1.9%
Langeberg	5.3%	0.8%	0.6%	2.0%	2.0%
<b>Overberg</b>	<b>10.6%</b>	<b>8.7%</b>	<b>4.8%</b>	<b>3.7%</b>	<b>2.4%</b>
Theewaterskloof	7.0%	4.5%	0.6%	1.6%	1.0%
Overstrand	1.1%	2.5%	3.7%	1.2%	0.9%
Cape Agulhas	1.0%	1.2%	0.4%	0.5%	0.2%
Swellendam	1.6%	0.6%	0.1%	0.4%	0.3%
<b>Eden</b>	<b>10.7%</b>	<b>28.6%</b>	<b>7.3%</b>	<b>7.8%</b>	<b>4.7%</b>
Kannaland	1.3%	0.0%	0.0%	0.4%	0.2%
Hessequa	2.0%	2.2%	1.5%	0.6%	0.3%
Mossel Bay	1.0%	3.1%	2.9%	1.4%	0.6%
George	3.4%	9.9%	1.0%	3.3%	2.3%
Oudtshoorn	1.9%	0.9%	0.1%	1.3%	0.8%
Bitou	0.6%	3.0%	1.0%	0.3%	0.1%
Knysna	0.6%	9.4%	0.8%	0.5%	0.4%
<b>Central Karoo</b>	<b>2.7%</b>	<b>0.4%</b>	<b>0.0%</b>	<b>0.1%</b>	<b>0.1%</b>
Laingsburg	0.6%	0.0%	0.0%	0.0%	0.0%
Prince Albert	0.6%	0.0%	0.0%	0.0%	0.0%
Beaufort West	1.5%	0.4%	0.0%	0.1%	0.1%

Data Source: Quantec (2018)

### 3. AGRICULTURAL LAND

There were approximately 2 million hectares recorded as being used for crop production in the WC in 2017. Of this, 338 588 hectares (17%) was being used for wheat. Asides from wheat, the top 10 crops in terms of area planted in the province in 2017, as shown in Figure 9, were wine grapes (91 221 ha), canola (90 523 ha), barley (86 670 ha), rooibos tea (58 996 ha), apples (21 512 ha), table grapes (13 095 ha), pears (10 711 ha), oranges (7 704 ha) and lupines (72 99 ha).



**Figure 9: Top 10 WC Crops by Area Planted, 2013 vs 2017**

*Data Source: WCDoA (2018a)*

Most of the province's grains, oil seeds and lupines are grown in the West Coast (35%) and the Overberg (30%). The West Coast also has the largest recorded area being used to grow vegetables (36%) as well as tobacco, teas and hops (99%). More than half of the province's orchards are located in the Cape Winelands district (57%). Table 1 below shows the amount of broad crop categories grown in each municipality as at 2017.

**Table 2: Geography of WC Crops Planted, 2017<sup>2</sup>**

	<b>Grains, Oil Seeds, Lupines</b>	<b>Orchards</b>	<b>Tobacco, Teas &amp; Hops</b>	<b>Vegetables</b>	<b>Other<sup>3</sup></b>	<b>Total</b>
<b>Cape Town</b>	<b>34 933</b>	<b>6 072</b>	<b>0</b>	<b>1 961</b>	<b>2 692</b>	<b>45 658</b>
City of Cape Town	34 933	6 072	0	1 961	2 692	45 658
<b>Cape Winelands</b>	<b>111 013</b>	<b>104 224</b>	<b>13</b>	<b>5 724</b>	<b>50 688</b>	<b>271 663</b>
Breede Valley	4 032	24 135	0	624	12 784	41 576
Drakenstein	39 561	18 359	8	679	2 132	60 740
Langeberg	21 627	23 571	0	588	17 255	63 041
Stellenbosch	7 027	15 009	0	745	1 625	24 406
Witzenberg	38 765	23 150	5	3088	16 892	81 900
<b>Central Karoo</b>	<b>8 108</b>	<b>1 067</b>	<b>0</b>	<b>476</b>	<b>9 153</b>	<b>18 803</b>
Beaufort West	4 739	188	0	41	4 841	9 809
Laingsburg	1 284	334	0	291	2 875	4 783
Prince Albert	2 085	545	0	144	1 436	4 210
<b>Eden</b>	<b>331 784</b>	<b>7 589</b>	<b>633</b>	<b>3 134</b>	<b>64 519</b>	<b>407 659</b>
Bitou	7 728	110	5	14	298	8 156
George	43 003	2 956	467	1 539	30 975	78 939
Hessequa	194 142	794	4	290	10 791	206 021
Kannaland	8 280	2 763	20	366	4 254	15 684
Knysna	7 947	66	0	22	686	8 720
Mossel Bay	52 938	473	6	314	5 258	58 990
Oudtshoorn	17 745	427	130	589	12 258	31 149
<b>Overberg</b>	<b>420 837</b>	<b>20 866</b>	<b>97</b>	<b>2 118</b>	<b>27 206</b>	<b>471 124</b>
Cape Agulhas	142 189	377	58	701	7 508	150 833
Overstrand	146 58	1297	37	765	714	17 470
Swellendam	139 748	3 009	1	196	12 642	155 595
Theewaterskloof	124 242	16 184	1	457	6 343	147 226
<b>West Coast</b>	<b>479 953</b>	<b>41 740</b>	<b>58 967</b>	<b>7 664</b>	<b>212 317</b>	<b>800 641</b>
Bergrivier	143 751	5 811	15 790	2 961	50 827	219 140
Cederberg	33 422	11 349	33 972	3 548	77 413	159 703
Matzikama	12 571	10 841	8 379	846	62 619	95 255
Saldanha Bay	60 734	42	806	97	8 220	69 899
Swartland	229 475	13 698	21	212	13 239	256 644
<b>Total WC</b>	<b>1 386 627</b>	<b>181 558</b>	<b>59 711</b>	<b>21 075</b>	<b>366 577</b>	<b>2 015 547</b>

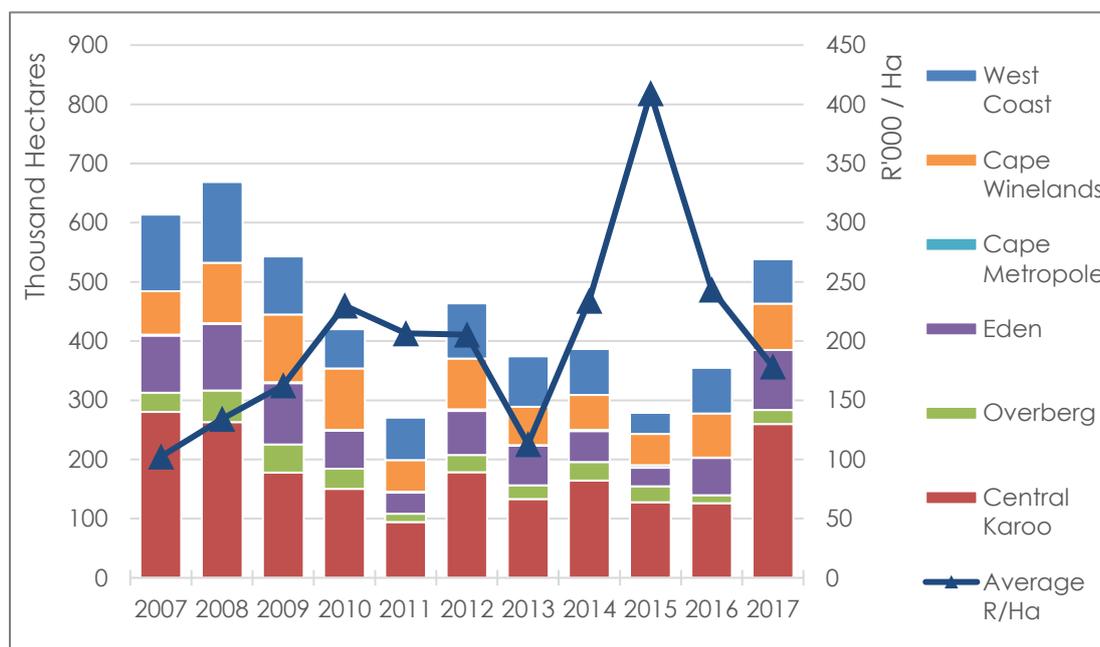
Data Source: WCDoA (2018a)

There is evidence to suggest that agricultural land sales are very price sensitive. Figure 10 shows the amount of hectares transferred through private markets between 2007 and 2017 and the average price of the transactions (Rand per hectare, converted to real 2017 prices). Generally the two series move in reverse, with land transferred increasing where the average price is decreasing and vice versa.

<sup>2</sup> This table excludes extensive grazing areas

<sup>3</sup> "Other" includes fallow land, old fields, stubble and weeds

In 2017 there was 538 030 hectares transferred in the land market, the highest amount since 2009, when 542 874 hectares were transferred. Almost half of the land traded in 2017 was in the Central Karoo (259 831 ha) with a significant amount of land also being traded in Eden (101 543 ha), Cape Winelands (77 933 ha) and the West Coast (74 846 ha).



**Figure 10: Agricultural Land Transferred and Real Value (2017 prices), 2007-2017**

Data Source: WCDoA (2018b)

Table 3 shows the number of transactions taking place per District over the past 10 years. Despite accounting for the largest amount of area transferred, the Central Karoo had significantly less transactions (87) than Eden (327), the Cape Winelands (207) and the West Coast (147), falling just lower than the Overberg (97) and hence surpassing only the Cape Metropole (5).

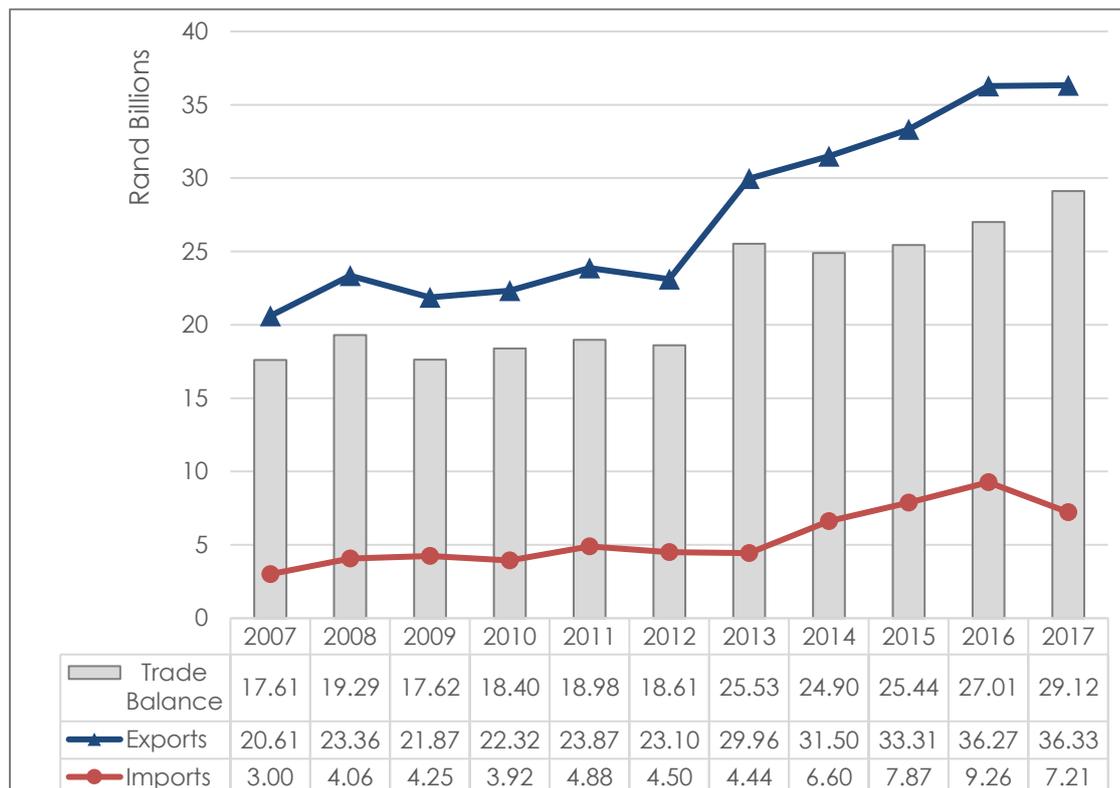
**Table 3: Number of Agricultural Land Transactions, 2007-2017**

	Central Karoo	Overberg	Eden	Cape Metropole	Cape Winelands	West Coast	Total
2007	86	117	267	26	202	187	885
2008	91	152	287	27	222	151	930
2009	100	144	361	28	277	159	1 069
2010	84	114	256	20	254	153	881
2011	41	72	137	18	158	93	519
2012	101	117	284	29	213	155	899
2013	65	88	242	13	170	143	721
2014	65	118	249	33	174	127	766
2015	47	87	203	42	142	89	610
2016	50	87	325	24	211	143	840
2017	87	97	327	5	207	147	870

Data Source: WCDoA (2018b)

## 4. AGRICULTURAL TRADE

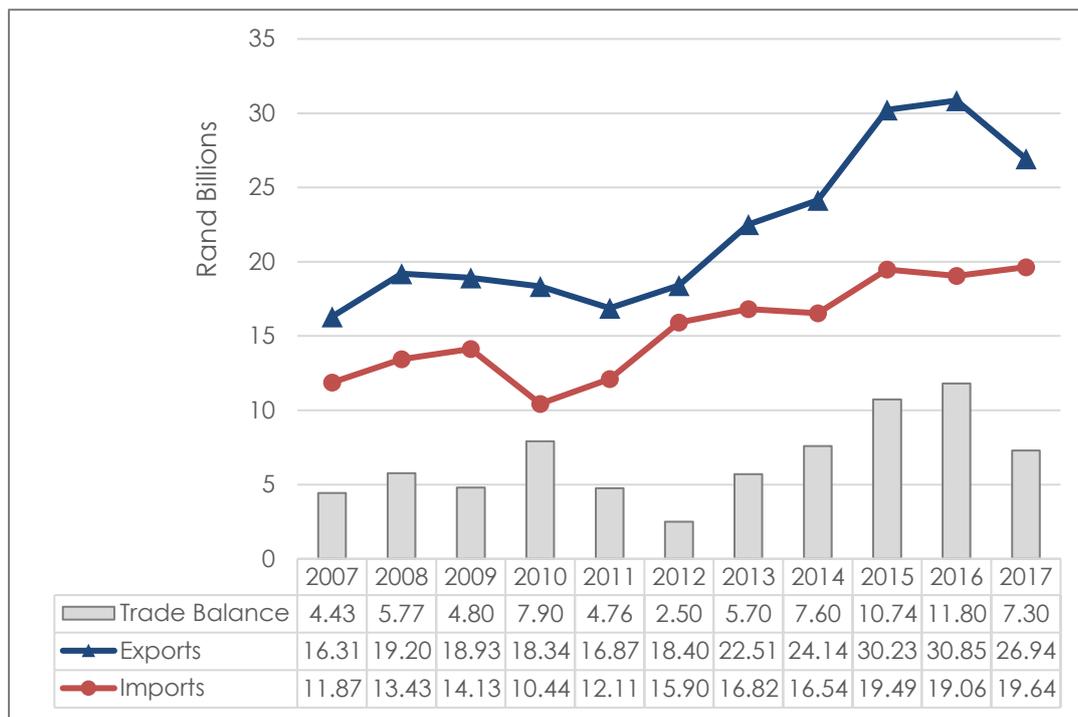
The value of exports from the WC Agriculture, Forestry and Fisheries (AFF) sector has been increasing considerably faster than inflation. In 2007 the real equivalent of exports from the sector in 2017 prices was less than R21 billion. Average real growth of 5.8% per annum has pushed this up to more than R36 billion in 2017. As imports in this sector have not grown much in real terms over the ten year period, the trade balance in the sector has grown strongly from R18 billion to R29 billion.



**Figure 11: WC Agriculture, Forestry & Fisheries (AFF) Trade, 2007-2017**

*Data Source: Quantec (2018)*

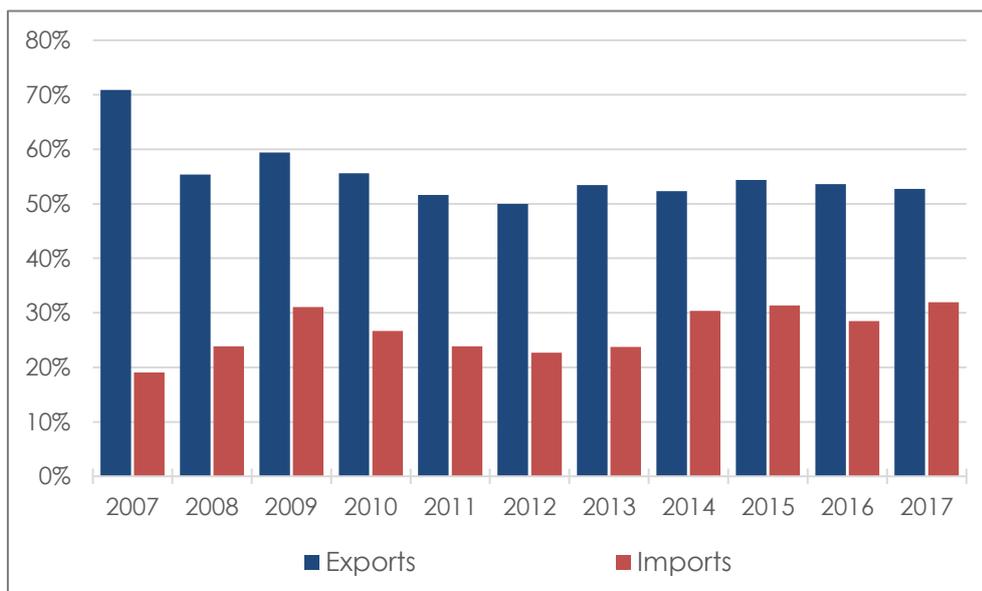
Exports of Food, Beverages and Tobacco (FBT) from the WC have also showed strong growth, maintaining a 5.1% average real annual growth rate between 2007 and 2017, despite a sharp drop off between 2016 and 2017. This trend is shown graphically in Figure 12 below. The key difference from the trade observed in the AFF sector in Figure 11 above is that imports of FBT have also grown strongly in real terms, meaning that the trade balance has not grown much over the period analysed, although it has remained positive.



**Figure 12: WC Food, Beverages & Tobacco (FBT) Trade, 2007-2017**

*Data Source: Quantec (2018)*

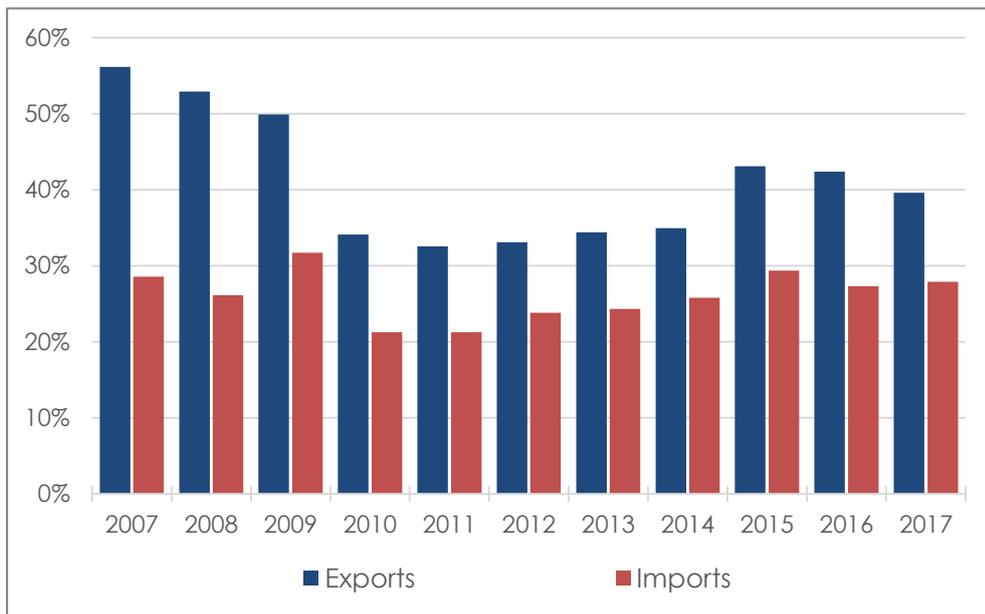
The WC accounts for more than half (53%) of all South African exports of AFF products and almost a third (32%) of all imports. The share in national exports is significantly lower than what it was in 2007 (71%) but has remained relatively constant between 2008 and 2017. The share in imports, conversely, has risen since 2007. Both series are plotted on the bar chart in Figure 13.



**Figure 13: WC Share in National AFF Trade, 2007-2017**

*Data Source: Quantec (2018)*

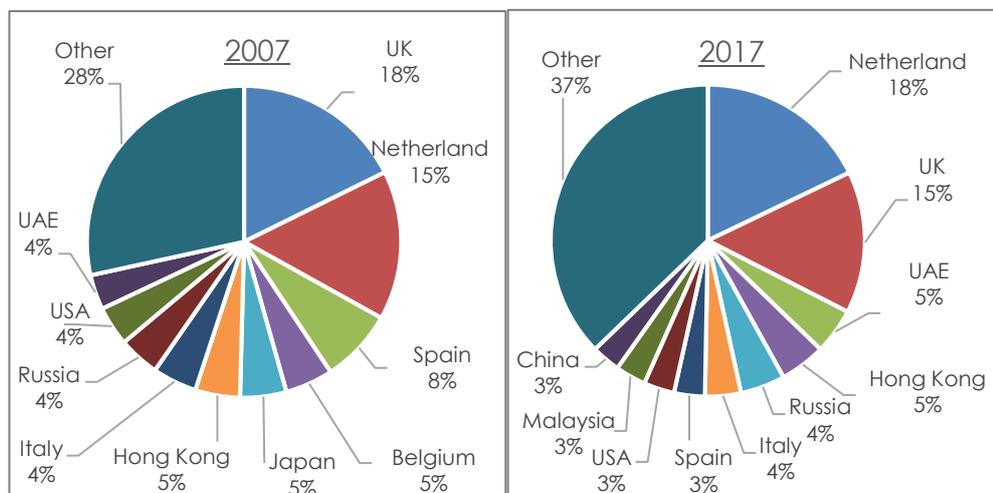
The WC's share in national FBT exports between 2007 and 2017 was also at its highest in 2007. In 2017, the WC's share in exports from the sector was 40%, with the province also responsible for 28% of South African imports of FBT products.



**Figure 14: WC Share in National FBT Trade, 2007-2017**

*Data Source: Quantec (2018)*

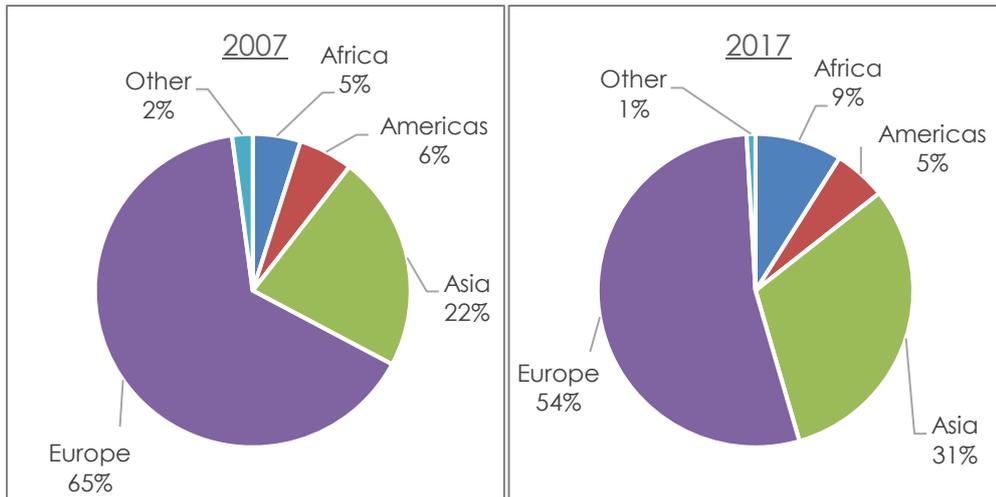
Figure 15 compares the main export destinations of agriculture, forestry and fisheries products for 2007 and 2017, in terms of the value of exports. The main two destinations, the UK and the Netherlands, switched around but retained a combined share of approximately 33% of all exports from the sector. The UAE and Hong Kong showed strong growth over the period to become the next two most important destinations.



**Figure 15: WC AFF Export Destinations - Countries, 2007 v 2017**

*Data Source: Quantec (2018)*

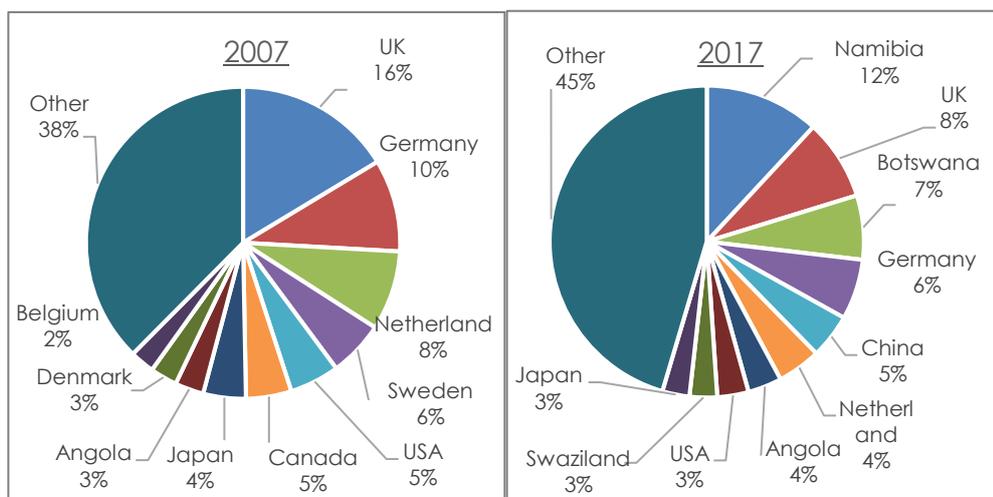
Europe's importance for the sector is further illustrated through the regional breakdown of the WC's AFF export destinations in Figure 16. In 2017, 54% of all exports from the sector went to Europe. Despite this dominance and the fact that the UK and Netherlands maintained their collective share, Europe's overall share in AFF exports fell to its current level from 65% in 2007. This drop was made up by strong growth in the share of exports going to Asia (22% to 31%) and Africa (5% to 9%).



**Figure 16: WC AFF Export Destinations - Regions, 2007 v 2017**

*Data Source: Quantec (2018)*

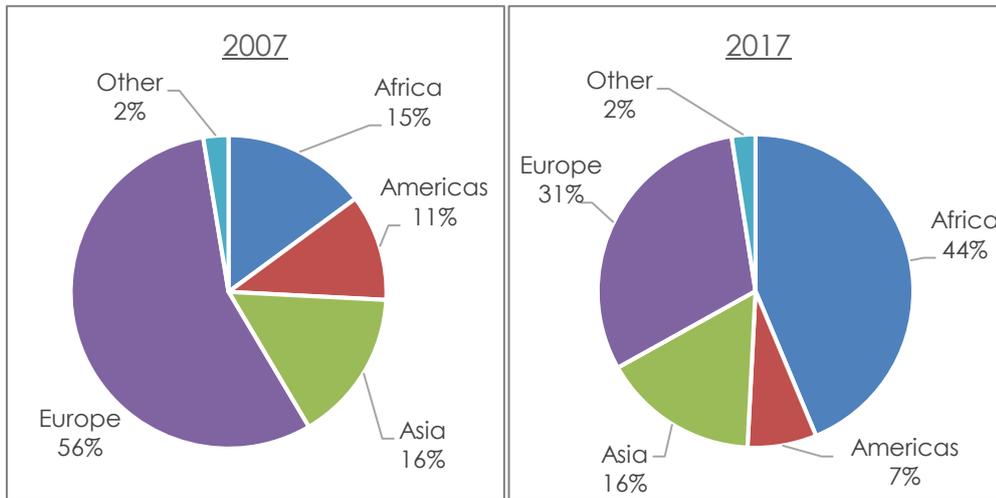
Looking at the FBT sector, there are more dramatic shifts with Namibia and Botswana rising from nowhere to be the first and third biggest destinations in 2017. China has also emerged as a key destination with most European destinations exhibiting significant declines in their relative importance to the WC's FBT sector.



**Figure 17: WC Top FBT Export Destinations - Countries, 2007 vs 2017**

*Data Source: Quantec (2018)*

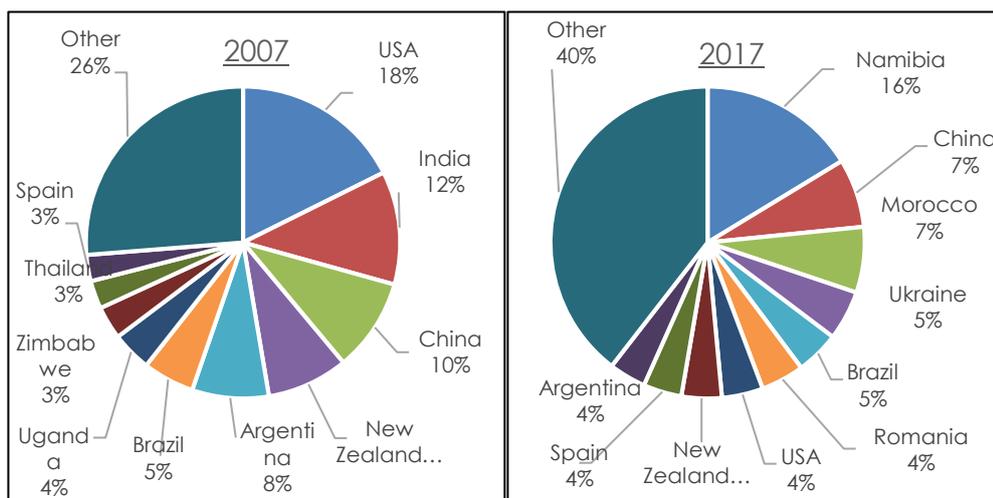
The significance of the rise of Africa as a destination of the WC's FBT exports can be further seen in Figure 18 which shows the regional destinations of all exports from the sector. Africa's share stood at only 15% in 2007 but this climbed to 44% in 2017, making it comfortably the biggest regional destination. Europe's share fell over the same period from 56% to 31%.



**Figure 18: WC FBT Export Destinations - Regions, 2007 vs 2017**

*Data Source: Quantec (2018)*

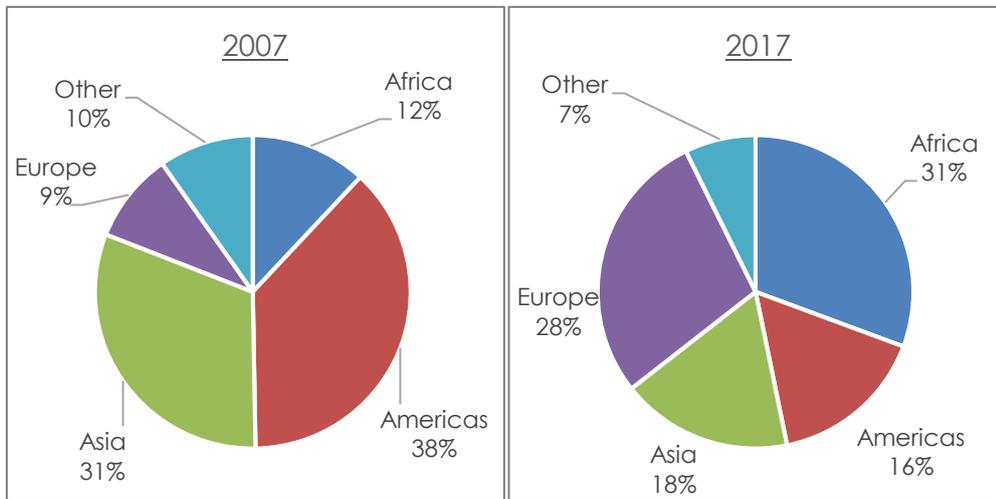
In addition to being the biggest destination country for WC FBT exports, Namibia was also the biggest origin of AFF imports (16%), as shown in Figure 19 below. The biggest supplier of AFF imports into the WC in 2007, USA, made up only 4% of imports in 2017, down from 18% 10 years prior. In general, there is evidence of diversification of the WC's AFF imports with the share of imports coming from the top 10 countries falling from 74% to 60%.



**Figure 19: WC AFF Import Origins - Countries, 2007 vs 2017**

*Data Source: Quantec (2018)*

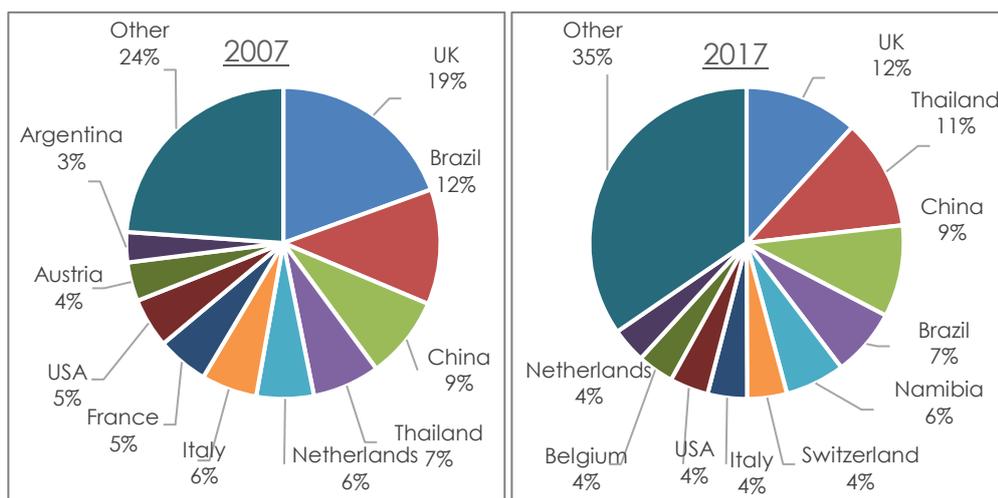
Regionally between 2007 and 2017, as shown in Figure 20, there was a large drop in the share of AFF imports coming from the Americas and Asia. This drop was made up by large increases in the imports of AFF products from Europe and Africa



**Figure 20: WC AFF Import Origins - Regions, 2007 vs 2017**

Data Source: Quantec (2018)

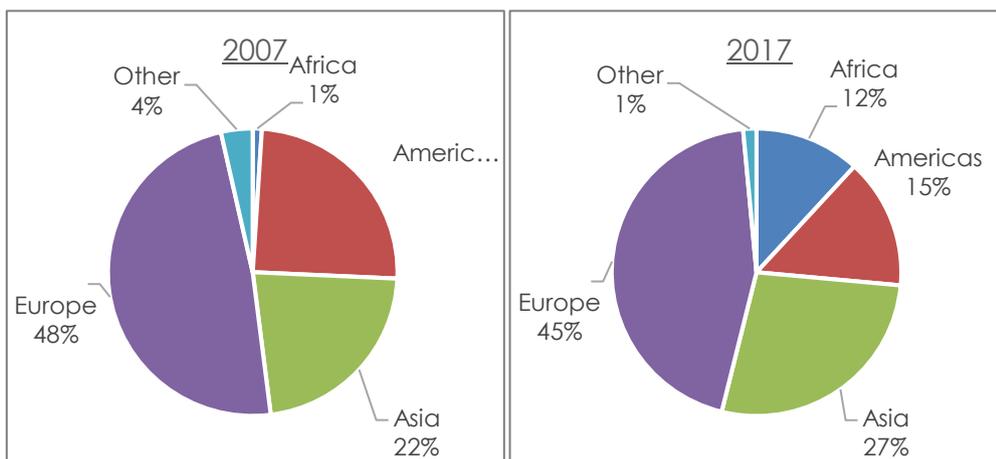
The biggest supplier of FBT imports to the WC, shown in Figure 21, was the UK for both 2007 and 2017. However, the share fell from 19% to 12% over that period. Thailand grew to the next biggest origin in 2017, whilst again Namibia rose to prominence over the ten year period.



**Figure 21: WC FBT Import Origins - Countries, 2007 vs 2017**

Data Source: Quantec (2018)

The regional breakdown of WC FBT import origins, shown in Figure 22, again showed a sharp increase in Africa's prominence, increasing the regions share from 1% to 12%. This was mainly at the expense of the Americas where the share fell from 25% to 15%.



**Figure 22: WC FBT Import Origins - Regions, 2007 vs 2017**

*Data Source: Quantec (2018)*

Table 4 shows the main WC agricultural exports in terms of value, at the detailed HS6 digit level. The high level of product specification allows for certain agri processing products to be identified which fall under other manufacturing sub sectors, such as textiles, where they could not previously be identified at aggregated product levels. It was decided to define agriculture and agri processing to encompass all products falling under: HS01-HS24; and HS50-HS53 (as per Pienaar & Partridge, 2015).

**Table 4: Biggest WC Agricultural and Agri Processing Exports by Value, 2017**

#	HS6	Description	Value (Rand) of Exports 2017	Share 2017	Real 10yr Annual Growth
1	220421	Bottled wine	6 463 455 154	10.28%	0.07%
2	080510	Oranges	6 233 452 481	9.91%	4.91%
3	080610	Table grapes	6 195 781 225	9.85%	5.40%
4	080810	Apples	4 191 806 051	6.67%	5.41%
5	080830	Pears	2 438 737 873	3.88%	
6	080520	Soft citrus	2 242 928 780	3.57%	12.92%
7	080550	Lemons & limes	2 040 628 796	3.24%	13.61%
8	220429	Bulk wine	1 926 305 220	3.06%	1.04%
9	240220	Cigarettes	1 759 883 369	2.80%	9.04%
10	030474	Hake	1 328 063 993	2.11%	
11	080940	Plums	977 295 721	1.55%	8.58%
12	230120	Fish meal	976 743 134	1.55%	11.75%
13	080540	Grapefruit	963 522 153	1.53%	-0.34%
14	121299	Rooibos	943 964 739	1.50%	
15	200870	Peaches	870 185 816	1.38%	2.23%
16	240319	Smoking Tobacco	804 072 908	1.28%	
17	200990	Mixed fruit juice	715 503 060	1.14%	16.60%
18	220870	Liqueurs & cordials	696 054 870	1.11%	3.41%
19	081040	Blueberries	650 642 229	1.03%	45.75%
20	210690	Food preparations	604 217 028	0.96%	26.13%
		Other agricultural exports	19 866 859 669	31.59%	-

*Data Source: Quantec (2018)*

The biggest agricultural export from the WC in 2017 at the HS-6 digit level was bottled wine, coming to a total value of R6.5 billion. The only other two products to break past R6 billion were oranges and table grapes (both R6.2 billion). These top three products accounted for more than 30% of all agricultural exports. It is also worth noting the exceptional growth displayed in exports of blueberries where a real annual growth rate of 46% was realised over the 10 year period from 2007 to 2017.

There were some products where growth was very rapid but from a very small base. Table 5 lists the fastest growing exports between 2007 and 2017. All 20 products listed make up only a little over 1% of total agriculture and agri processing exports but are worth taking note of due to the very high real growth rates, as high as 195% per annum over ten years for soya-bean oil.

**Table 5: Fastest Growing WC Agricultural and Agri Processing Exports, 2007-2017**

#	HS6	Description	Value (Rand) of Exports 2017	Share 2017	Real 10yr Annual Growth
1	150790	Soya-bean oil	11 820 228	0.02%	195.23%
2	080231	Walnuts in shell	18 674 517	0.03%	151.09%
3	230630	Sunflower oilcake	13 978 205	0.02%	124.01%
4	120910	Sugar beet seed	1 716 383	0.00%	120.22%
5	030741	Cuttlefish	576 965 069	0.92%	117.48%
6	520839	Woven cotton fabrics	193 084	0.00%	111.37%
7	080420	Figs	40 954 858	0.07%	102.26%
8	240391	Reconstituted tobacco	2 882 552	0.00%	101.25%
9	240399	Chewing tobacco	32 848 480	0.05%	95.56%
10	030244	Mackerel	274 963	0.00%	88.19%
11	151319	Coconut oil	1 518 505	0.00%	87.94%
12	220510	Bottled vermouth	57 438 413	0.09%	84.25%
13	110630	Fruit and nut powder	5 896 154	0.01%	81.70%
14	160412	Herrings	909 010	0.00%	78.93%
15	151229	Cotton seed oil	3 824 531	0.01%	77.77%
16	020210	Beef	4 629 413	0.01%	77.34%
17	020724	Turkey	65 309	0.00%	76.66%
18	030313	Frozen salmon	784 490	0.00%	76.56%
19	080211	Almonds in shell	1 567 381	0.00%	76.37%
20	510910	Yarn >=85% wool	1 357 815	0.00%	75.42%
Other agricultural exports			62 097 209 797	98.74%	-

Data Source: Quantec (2018)

The biggest import classified as agriculture or agri processing in 2017 was whiskies, totalling R1.9 billion. This is despite a real decline since 2007 at an average annual rate of 2.8%. Other big imports recorded for the year were: poultry cuts and offal; beer; and animal guts. Particularly impressive growth was observed in imports of sardines and cigarettes.

**Table 6: Biggest WC Agricultural and Agri Processing Imports by Value, 2017**

#	HS6	Description	Value (Rand) of Imports 2017	Share 2017	Real 10yr Annual Growth
1	220830	Whiskies	1 915 994 444	7.12%	-2.78%
2	020714	Poultry cuts and offal	1 135 290 535	4.22%	1.83%
3	220300	Beer	898 675 679	3.34%	-0.33%
4	050400	Animal guts	873 007 760	3.24%	7.99%
5	240120	Stemmed/stripped tobacco	741 299 073	2.75%	7.76%
6	100630	Milled rice	666 761 052	2.48%	3.76%
7	030353	Sardines	631 984 191	2.35%	68.16%
8	100199	Wheat & meslin	625 684 417	2.32%	
9	160413	Preserved sardines	625 385 806	2.32%	8.99%
10	240220	Cigarettes	621 959 581	2.31%	64.39%
11	220210	Waters	584 703 356	2.17%	1.79%
12	200979	Apple juice	559 803 430	2.08%	3.66%
13	030617	Frozen shrimp & prawns	556 053 188	2.07%	
14	160414	Canned tuna	555 553 451	2.06%	6.62%
15	100590	Maize	477 518 733	1.77%	61.09%
16	100640	Broken rice	459 823 843	1.71%	66.91%
17	230910	Dog & cat food	452 879 531	1.68%	39.15%
18	020230	Frozen boneless beef	433 546 900	1.61%	23.39%
19	230110	Meat/offal flour	356 763 702	1.32%	27.21%
20	030389	Miscellaneous frozen fish	319 477 817	1.19%	
		Other agricultural exports	13 434 778 995	49.89%	-

Data Source: Quantec (2018)

There were again some other products which exhibited impressively high growth rates from smaller bases. Between 2007 and 2017 imports of fish meal grew by 343% per annum over and above inflationary increases. There was also very strong growth in exports of beet sugar and roasted malt where in both cases average annual growth rates over the 10 years exceeded 200%.

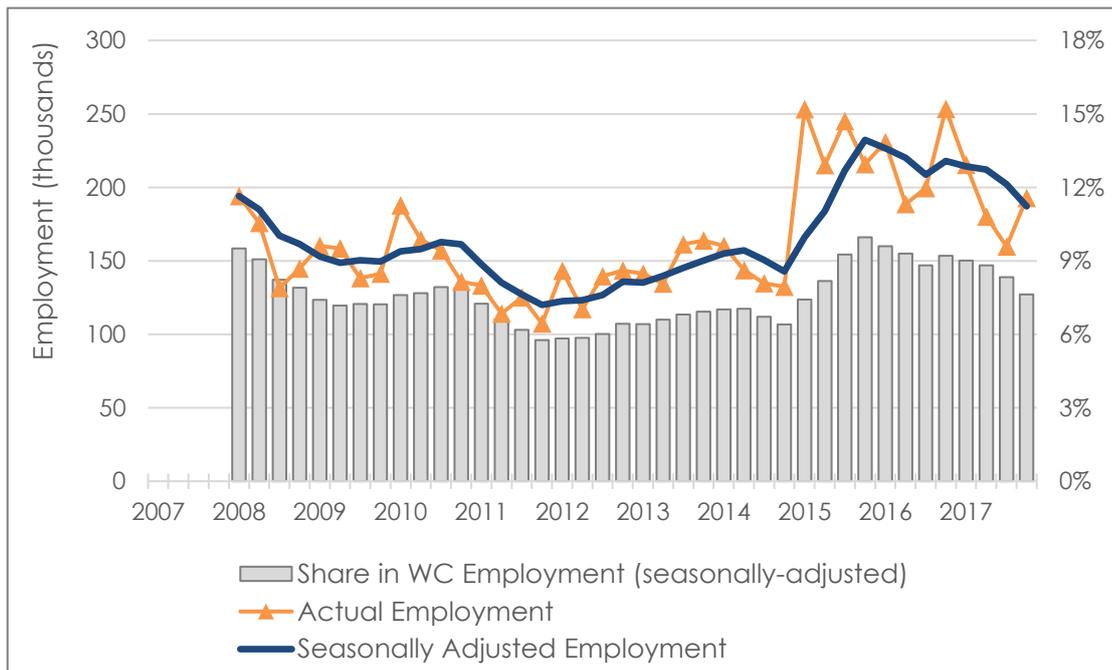
**Table 7: Fastest Growing WC Agricultural and Agri Processing Imports, 2007-2017**

#	HS6	Description	Value (Rand) of Imports 2017	Share 2017	10yr Annual Real Growth
1	230120	Fish meal	10 631 219	0.04%	343.45%
2	170112	Beet sugar	140 483 714	0.52%	256.71%
3	110720	Roasted malt	315 276 322	1.17%	221.48%
4	230400	Soya-bean oilcake	289 785 788	1.08%	158.12%
5	040310	Yoghurt	2 272 154	0.01%	151.94%
6	080550	Lemons & Limes	5 603 466	0.02%	140.64%
7	021020	Preserved meat excl. Beef & pork	26 327 712	0.10%	132.58%
8	151229	Cotton-seed oil	108 296	0.00%	120.55%
9	120510	Canola oil	137 396 005	0.51%	117.56%
10	200939	Citrus juice	8 114 586	0.03%	108.98%
11	520528	Cotton yarn < 83,33 decitex	10 456 401	0.04%	108.92%
12	151311	Coconut oil & fractions	6 557 796	0.02%	99.61%
13	040229	Sweetened milk & cream	5 469 569	0.02%	92.56%
14	520533	Cotton yarn 192,31-232,56 decitex	492 254	0.00%	92.44%
15	151329	Palm oil	3 758 589	0.01%	88.80%
16	170240	Glucose 20-50%	5 039 166	0.02%	81.74%
17	121020	Ground hop cones	25 162 352	0.09%	74.86%
18	220600	Cider	76 260 009	0.28%	73.82%
19	531090	Bleached vegetable fibre fabrics	2 553 439	0.01%	71.89%
20	160249	Processed pork	23 870 155	0.09%	69.26%
Other agricultural exports			25 563 294 326	94.94%	-

Data Source: Quantec (2018)

## 5. AGRICULTURAL EMPLOYMENT

At the end of 2017 it is estimated that there were 187 044 individuals employed in the WC Agriculture, Forestry and Fisheries (AFF) sector. This is according to quarterly employment data, seasonally adjusted using four period moving averages to remove seasonality. The seasonal adjustment is necessary as otherwise the short term fluctuations in production as a result of the different seasons can lead to misleading interpretations. Whilst employment at the end of 2017 is lower than the 232 319 recorded at the end of the fourth quarter of 2015, it is still higher than any value between the first quarter of 2008 and the third quarter of 2015.

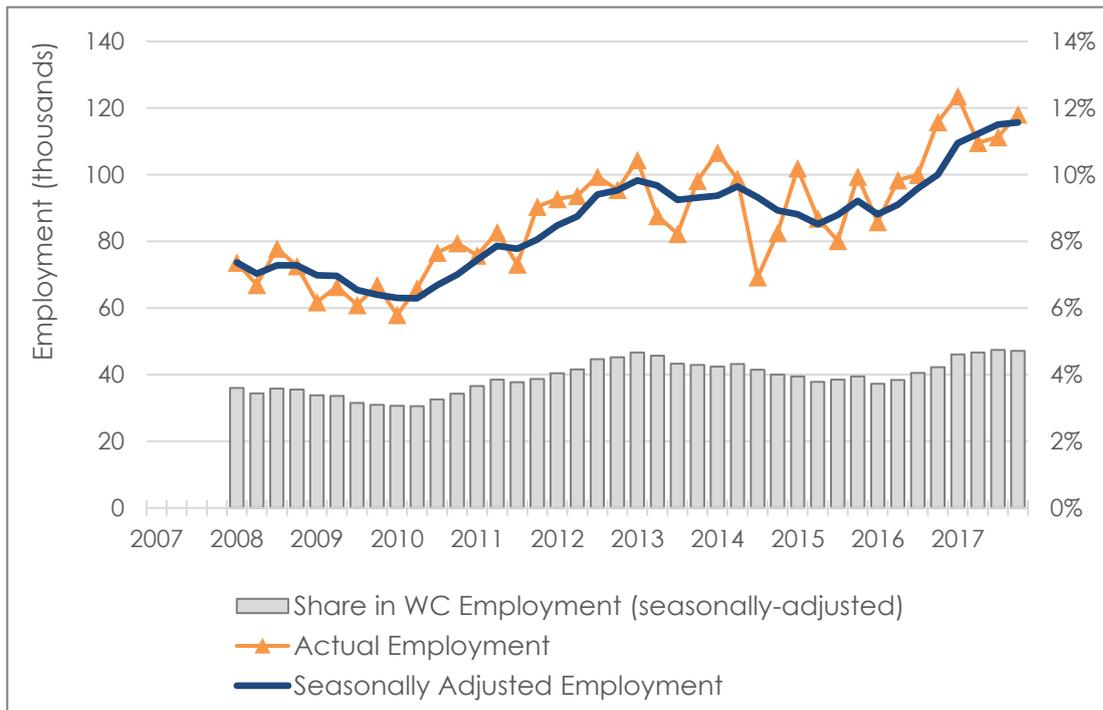


**Figure 23: WC Employment in Agriculture, Forestry & Fisheries (AFF), 2007-2017**

*Data Source: Stats SA (2018c)*

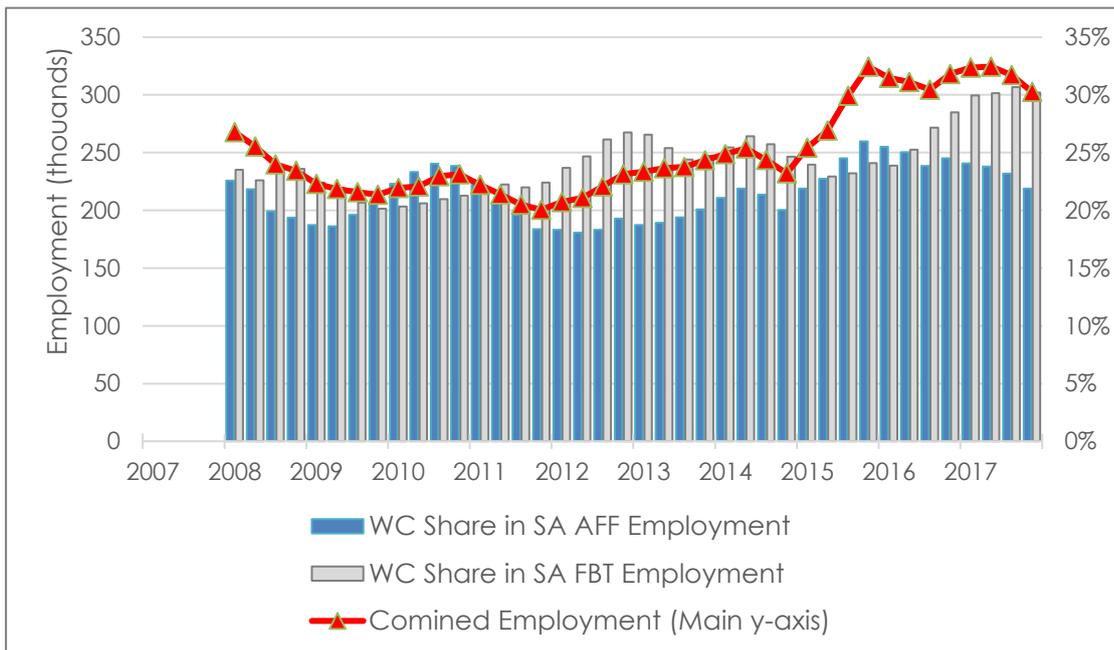
Employment in the FBT Sector, shown in Figure 24, also fell from 2008. However the recovery began much earlier, at the start of 2010. Since then employment has grown strongly from 63 040 to 115 688 at the end of 2017. This implies that between the beginning of 2010 and the end of 2017 the WC FBT sector created on average 6 581 new jobs each year.

When the employment series for AFF and FBT are combined, as plotted by the line graph in Figure 25, the downward pressure after 2008 is still evident. This is followed by a stagnant period where employment hovered between 200 thousand and 250 thousand for a few years after which there was significant upward growth. At the end of 2017 combined employment across the two sectors was 302 732 making up 12.3% of total WC employment.



**Figure 24: Western Cape Employment in Food, Beverages & Tobacco (FBT) 2007-2017**

*Data Source: Stats SA (2018b)*



**Figure 25: WC Share in National Sectoral Employment (seasonally adj.), 2007-2017**

*Data Source: Stats SA (2018b)*

When looking at employment performance, employment growth needs to be considered in tandem with the changes in the structure of employment. It is not just enough to create jobs but it is important to also look at whether the jobs being created are meaningful and sustainable going forward. South Africa's NDP also highlights the need to improve economic

access for marginalised groups, specifically black individuals, women and the youth. The plan also recognizes the lack of economic access for rural communities and the high incidence and intensity of poverty in these areas (NDP, 2030).

Table 8 provides the demographic breakdown of employment. In the AFF sector there was a significant increase in the share of the labour force attributed to the youth<sup>4</sup> (+2.1%) and rural dwellers (+1.8%). There was also a marginal increase in the share of jobs being held by black<sup>5</sup> individuals (+0.4%), however there was a decline in the female share of the labour force (-2.6%).

**Table 8: Demographics of Western Cape Agricultural Employment, 2007 vs 2017**

	<b>Black<sup>5</sup></b>	<b>Female</b>	<b>Youth<sup>4</sup></b>	<b>Rural</b>
<u>Agriculture, Forestry and Fisheries (AFF)</u>				
2008	91%	38%	47%	57%
2017	91%	36%	49%	59%
<i>Relative Change</i>	0.4%	-2.6%	2.1%	1.8%
<u>Food, Beverages and Tobacco (FBT)</u>				
2008	92%	50%	55%	4%
2017	88%	47%	47%	4%
<i>Relative Change</i>	-4.6%	-3.6%	-8.8%	-0.5%
<u>Combined</u>				
2008	91%	42%	49%	43%
2017	90%	40%	48%	38%
<i>Relative Change</i>	-1.3%	-1.7%	-1.2%	-4.7%

*Data Source: Stats SA (2018b)*

The performance of the FBT sector looks more negative. In all cases the share of the labour force declined, to the extent that it pulled down all the relative changes in the combined totals such that they were also all negative even where the AFF sector made positive progress. However, it should be noted that this needs to be viewed in the context of a sector where employment has been growing very fast. For this reason although the relative share in total employment has declined for all the groups identified, the net jobs changes show a very positive picture. In fact, despite the negative changes in the combined shares in employment, there have been significant jobs created for all of the groups highlighted in Table 8 as follows:

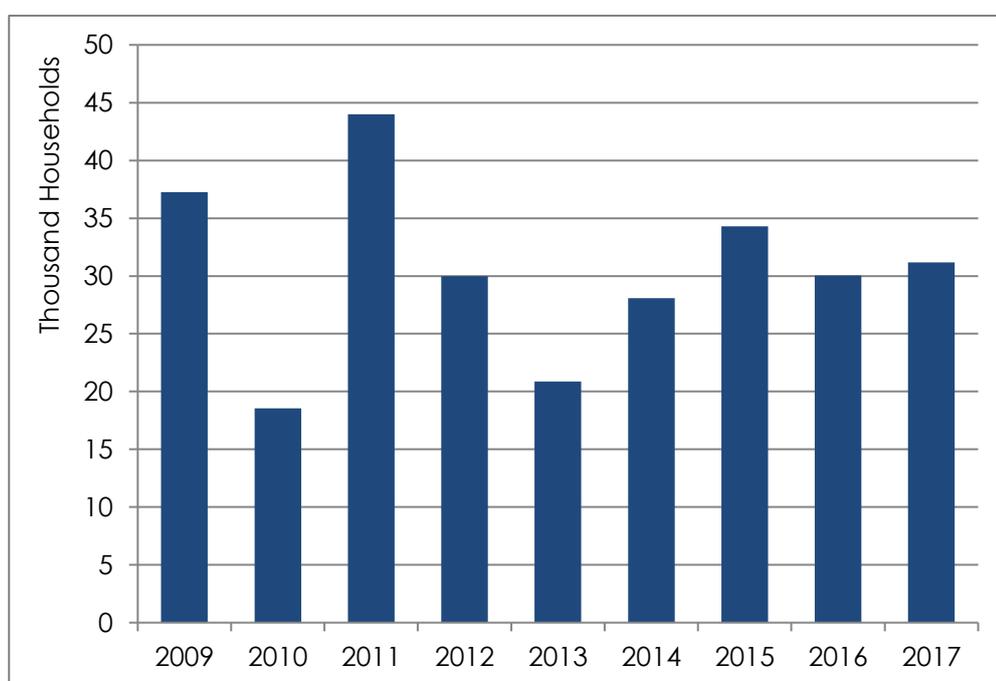
- **Black:** + 27 841 employees
- **Females:** + 9 416 employees
- **Youth:** + 13 717 employees
- **Rural:** + 634 employees

<sup>4</sup> "Youth" are defined as individuals between the ages of 16 and 34

<sup>5</sup> "Black" is defined according to the Broad-Based Black Economic Empowerment (B-BBEE) Act of 2003 which states that "'black people' is a generic term which means Africans, Coloureds and Indians" (RSA Presidency, 2003, p. 4; RSA Presidency). The definition was amended in 2013 to include the qualification of being a South African citizen (RSA Presidency, 2014). The QLFS does not capture individuals' citizenship status so this analysis had to take the pre-amendment definition without the citizenship qualification.

## 6. SUBSISTENCE FARMING

Subsistence farming is an important part of livelihoods in both rural and urban areas, although rural dwellers are more reliant on it compared with their urban counterparts. Evidence from South Africa's annual General Household Surveys suggest that there has been a gradual increase in the number of households partaking in agricultural activities outside of commercial enterprises in the WC. Figure 26 illustrates this, plotting the number of households taking part in these non-commercial agricultural activities, i.e. outside of paid employment. Households where agricultural activities were for leisure purposes only were excluded so that the results show only those households farming for subsistence purposes or to sell their produce. There appears over the ten year period fluctuations around a very slight upward trend. After a drop from 2009 to 2010 there were only 18 536 households involved in the described agricultural activities, by 2017 this had increased to 31 186. This increase of 12 650 households, or 1 807 per annum, is significant but does not make up the sharp drop between 2009 and 2010.



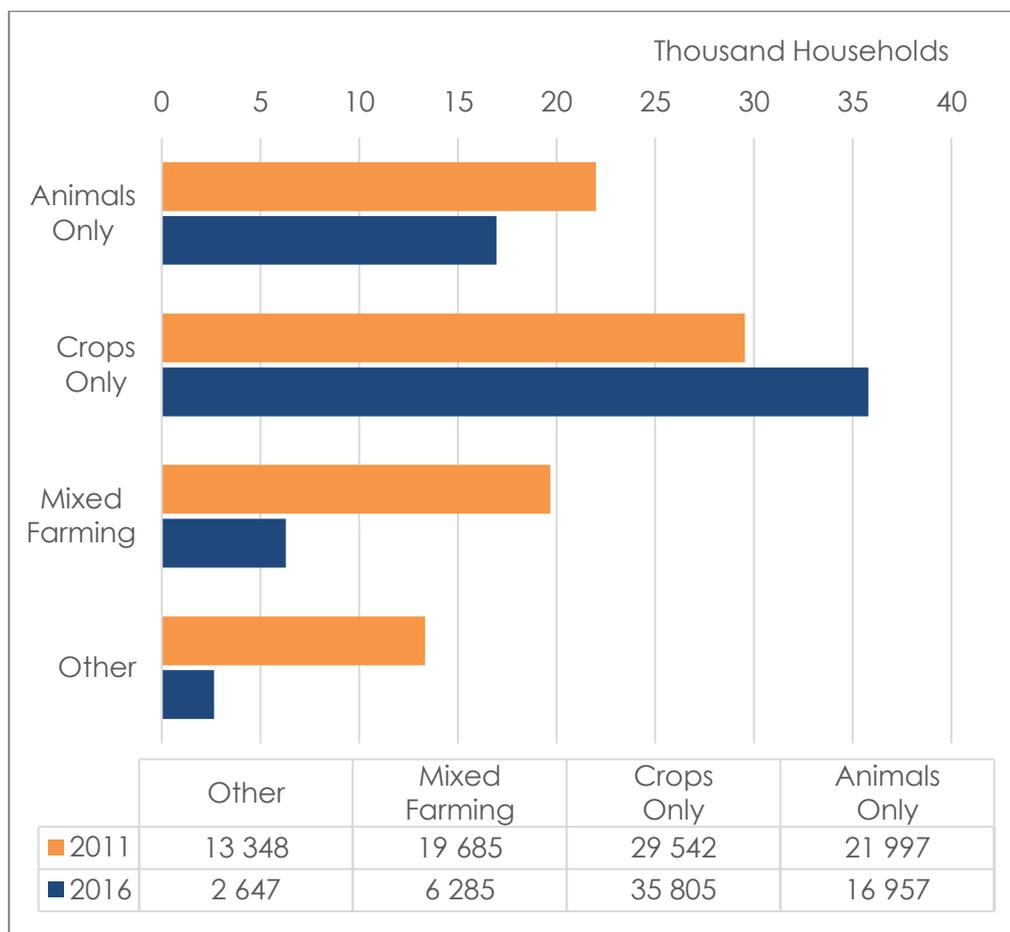
**Figure 26: Households Involved in Non-Commercial Agriculture, 2009-2017**

*Data Source: Stats SA (2018c)*

When analysing Figure 26 above it is also important to consider the recent drought and resultant water restrictions which would be expected to put significant downward pressure on the upward trend for 2016 and 2017. In 2015, there were 71 303 of the "agricultural households" referred to. This implies an average increase of 7 469 households every year since 2007 before the impact of the drought was felt. After 2015, the number of households declined by on average 10 280 households a year.

Figure 27 compares the number of households in 2011 and 2016 in each classification of specific agricultural activities undertaken. Over this five year period there has been a

decline in the number of households only rearing animals and an increase in the number growing only crops. There was also a decline in the number of households which reared animals and grew crops, as well as the number of households whose activities do fall not within one of the three aforementioned groups. In 2016 more than half (58%) of agricultural households in the province exclusively grew crops. This is a relative increase from a share of 35% in 2011.

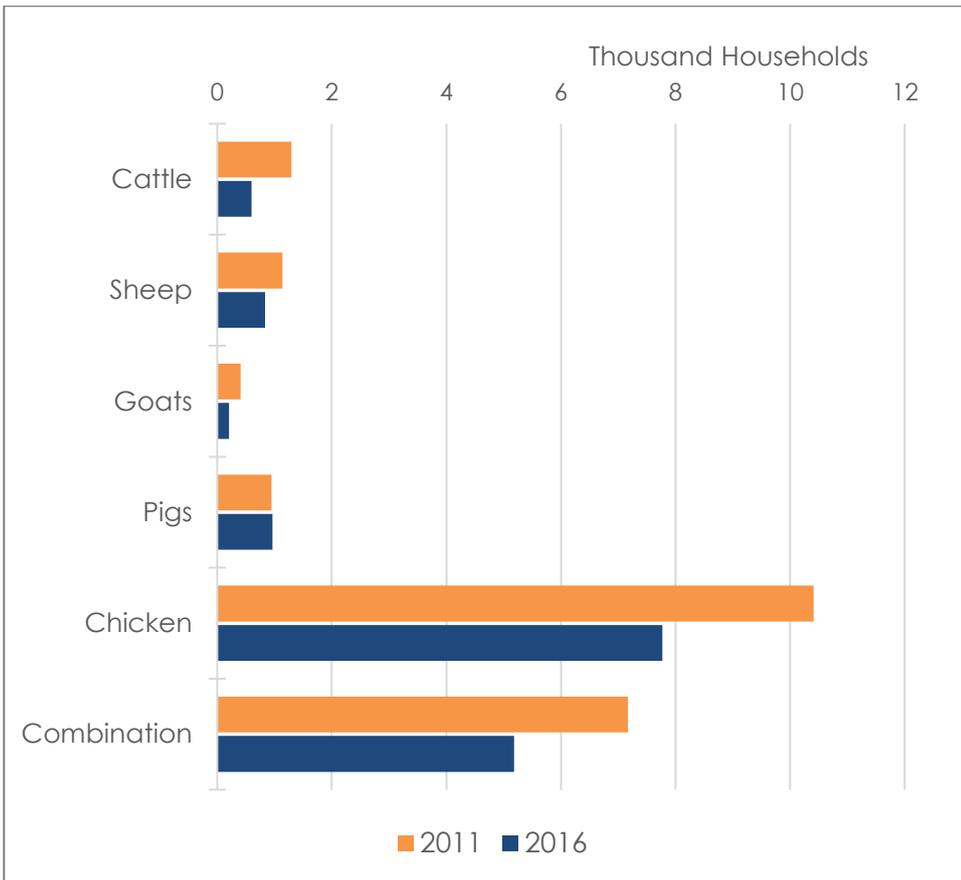


**Figure 27: WC Agricultural Households by Activity, 2011 vs 2016**

*Data Source: Stats SA (2016)*

Focusing on livestock activities, broken down by type in Figure 28, the decline was almost uniformly felt across the different livestock options. The exception being households only farming pigs where there was a very slight increase from 947 to 965 over the 5 year period.

The biggest net decline was in households rearing chickens which fell from 10 411 to 7 773 (drop of 2 638). However this is from a large base as even with this drop the share in total households with livestock stood at 50% in 2016. The biggest relative decline was in cattle farming where the drop from 1 294 to 597 households worked out to a drop of 54%. Whilst it is hard to pinpoint the exact reason for these changes the onset of the drought nation-wide would be expected to play a role.



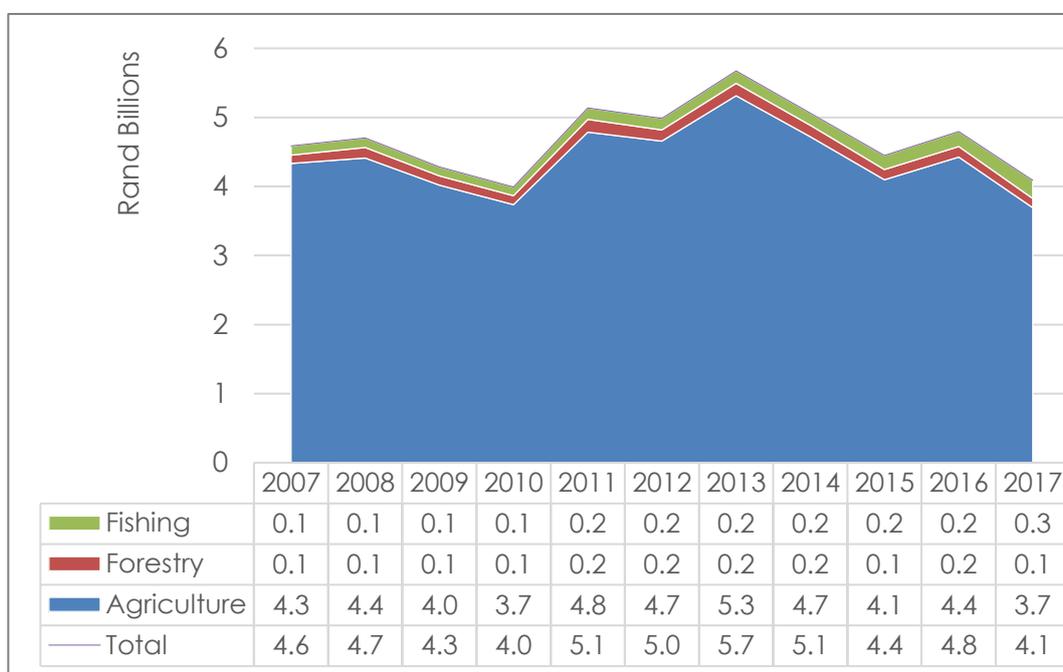
**Figure 28: WC Livestock Households by Livestock Type, 2011 vs 2016**

*Data Source: Stats SA (2016)*

## 7. INVESTMENT IN AGRICULTURE

In real terms, investment in the WC's Agriculture, Forestry and Fisheries (AFF) sector was less in 2017 than was observed 10 years ago. This is not surprising given the decline in the sector already observed, as well as the increased risk in agricultural investments brought about by climate change (Partridge & Wagner, 2016), political changes and unpredictability with regards to trade relationships which WC agriculture has become particularly reliant on (Partridge & Pienaar, 2016; Partridge, 2017).

If 2007 investments in the sector are converted to 2007 prices they would be R4.59 billion, compared with R4.09 billion in 2017. The real annual investment amounts over the ten year period between these two years are shown in Figure 29, broken down into the three subsectors.



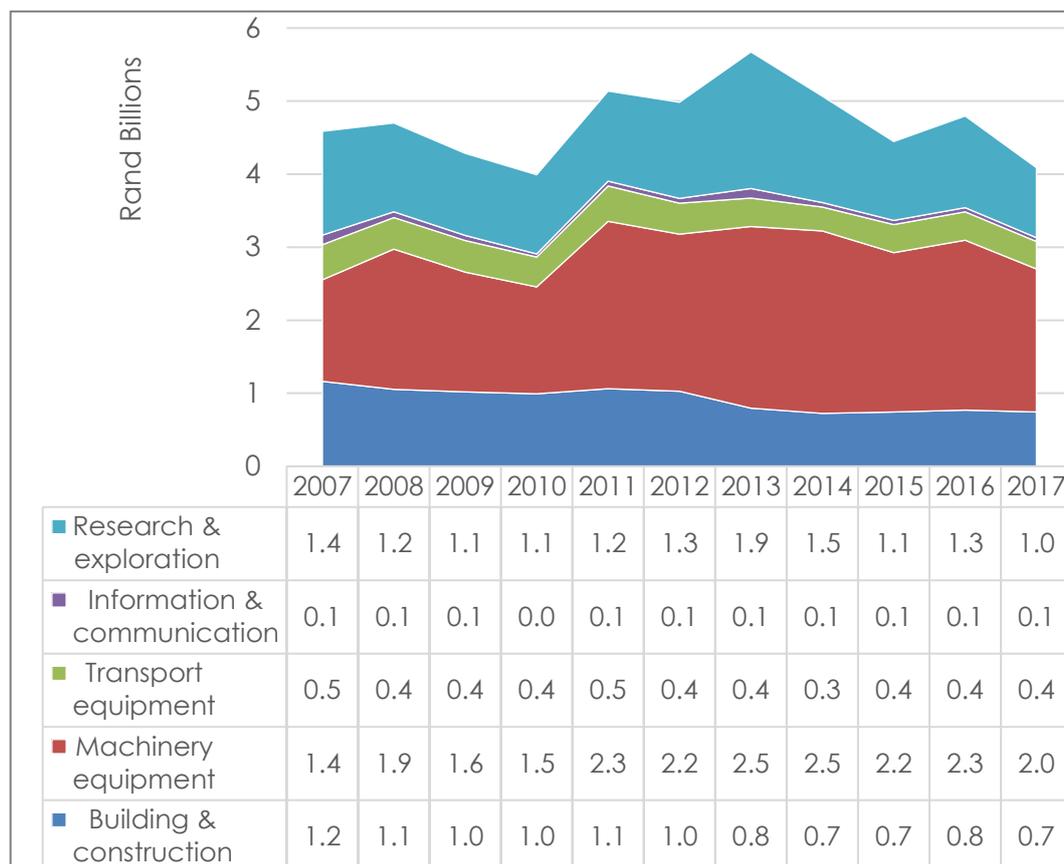
**Figure 29: Real Investment (GFCF) in WC AFF by Subsector (2017 prices), 2007-2017**

*Data Source: Quantec (2018)*

Despite the overall decline, there is a positive story for investment in the province's fisheries sector where it has grown from only R132 million in 2007 (in 2017 prices), to R263 million in 2017. Forestry investment increased marginally over the period from R120 million in 2007 (2017 prices) to R134 million.

In terms of the different nature of investment in the WC AFF sector, shown in Figure 30, most of the growth has come from investments in machinery equipment. Here investment has grown at an average real annual rate of 3.5% per annum from R1.39 billion in 2007 to R1.96 billion in 2017, almost half of all investment.

All other areas experienced real declines in the value of investments in the sector. The biggest net declines were in research and exploration (-R461 million) and building and construction (-R420 million). The biggest proportional decline was in information and communication where there was an average real annual decline of 9.1%. It is a concern that investment is not only on the decline but also becoming more concentrated in machinery equipment at the expense of investments in areas like research and information exchange which have the potential to improve the overall capabilities of the sector.



**Figure 30: Real Investment (GFCF) in WC AFF by Nature (2017 prices), 2007-2017**

*Data Source: Quantec (2018)*

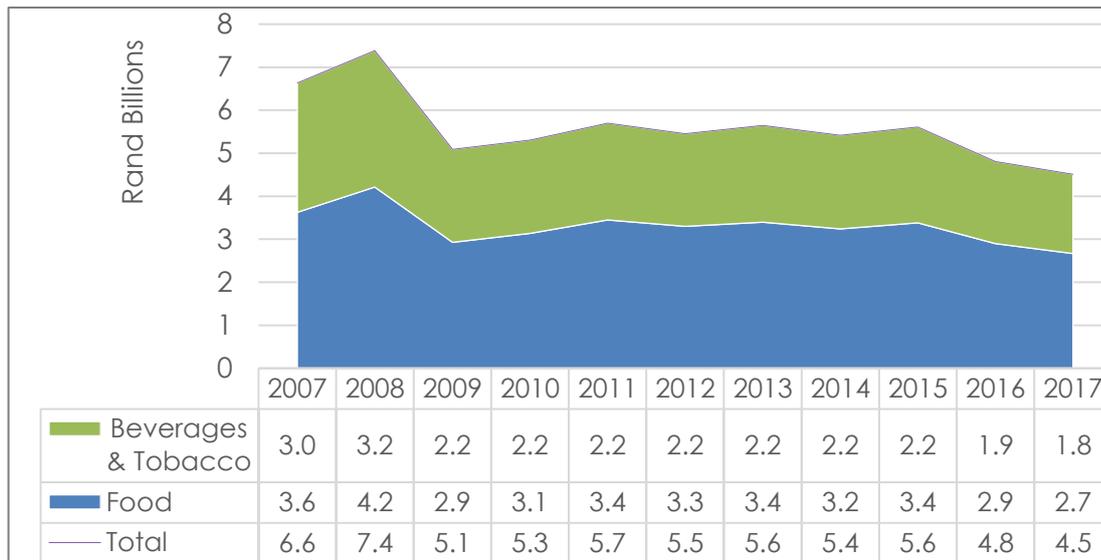
Table 9 shows the geographic spread of investment in the WC's AFF sector for 2017, as well as the previous year and 10 years ago. Investment generally follows production with most investment going to the Cape Winelands and West Coast where the highest levels of production are (See Section 2: Agricultural Production). Over the past decade the West Coast and City of Cape Town were the only Districts to experience real investment growth in the AFF sector.

**Table 9: Geography of AFF Investment (GDFI), 2007-2017**

	2007		2016		2017		10y Annual Growth
	Rm	Share	Rm	Share	Rm	Share	
<b>City of Cape Town</b>	<b>763</b>	<b>16.6%</b>	<b>929</b>	<b>19.4%</b>	<b>823</b>	<b>20.1%</b>	<b>0.76%</b>
City of Cape Town	763	16.6%	929	19.4%	823	20.1%	0.76%
<b>West Coast</b>	<b>997</b>	<b>21.7%</b>	<b>1 158</b>	<b>24.1%</b>	<b>1 000</b>	<b>24.5%</b>	<b>0.04%</b>
Matzikama	197	4.3%	259	5.4%	219	5.3%	1.04%
Cederberg	178	3.9%	177	3.7%	150	3.7%	-1.67%
Bergrivier	250	5.5%	284	5.9%	242	5.9%	-0.32%
Saldanha Bay	86	1.9%	120	2.5%	120	2.9%	3.45%
Swartland	286	6.2%	318	6.6%	269	6.6%	-0.61%
<b>Cape Winelands</b>	<b>1 619</b>	<b>35.3%</b>	<b>1 550</b>	<b>32.3%</b>	<b>1 293</b>	<b>31.6%</b>	<b>-2.22%</b>
Witzenberg	343	7.5%	346	7.2%	291	7.1%	-1.63%
Drakenstein	373	8.1%	373	7.8%	312	7.6%	-1.77%
Stellenbosch	251	5.5%	231	4.8%	192	4.7%	-2.66%
Breede Valley	390	8.5%	360	7.5%	299	7.3%	-2.62%
Langeberg	262	5.7%	241	5.0%	200	4.9%	-2.69%
<b>Overberg</b>	<b>542</b>	<b>11.8%</b>	<b>500</b>	<b>10.4%</b>	<b>417</b>	<b>10.2%</b>	<b>-2.58%</b>
Theewaterskloof	352	7.7%	320	6.7%	265	6.5%	-2.77%
Overstrand	61	1.3%	60	1.3%	53	1.3%	-1.30%
Cape Agulhas	51	1.1%	47	1.0%	39	1.0%	-2.48%
Swellendam	79	1.7%	72	1.5%	59	1.5%	-2.81%
<b>Eden</b>	<b>546</b>	<b>11.9%</b>	<b>537</b>	<b>11.2%</b>	<b>453</b>	<b>11.1%</b>	<b>-1.86%</b>
Kannaland	61	1.3%	56	1.2%	46	1.1%	-2.79%
Hessequa	109	2.4%	98	2.1%	82	2.0%	-2.80%
Mossel Bay	55	1.2%	54	1.1%	47	1.2%	-1.54%
George	164	3.6%	166	3.5%	140	3.4%	-1.62%
Oudtshoorn	88	1.9%	87	1.8%	72	1.8%	-1.95%
Bitou	28	0.6%	32	0.7%	28	0.7%	-0.05%
Knysna	40	0.9%	43	0.9%	37	0.9%	-0.68%
<b>Central Karoo</b>	<b>120</b>	<b>2.6%</b>	<b>122</b>	<b>2.5%</b>	<b>102</b>	<b>2.5%</b>	<b>-1.57%</b>
Laingsburg	27	0.6%	27	0.6%	22	0.5%	-1.91%
Prince Albert	26	0.6%	27	0.6%	23	0.6%	-1.28%
Beaufort West	67	1.5%	69	1.4%	57	1.4%	-1.55%
<b>Western Cape</b>	<b>4 587</b>	<b>100.0%</b>	<b>4 796</b>	<b>100.0%</b>	<b>4 089</b>	<b>100.0%</b>	<b>-1.14%</b>

Data Source: Quantec (2018)

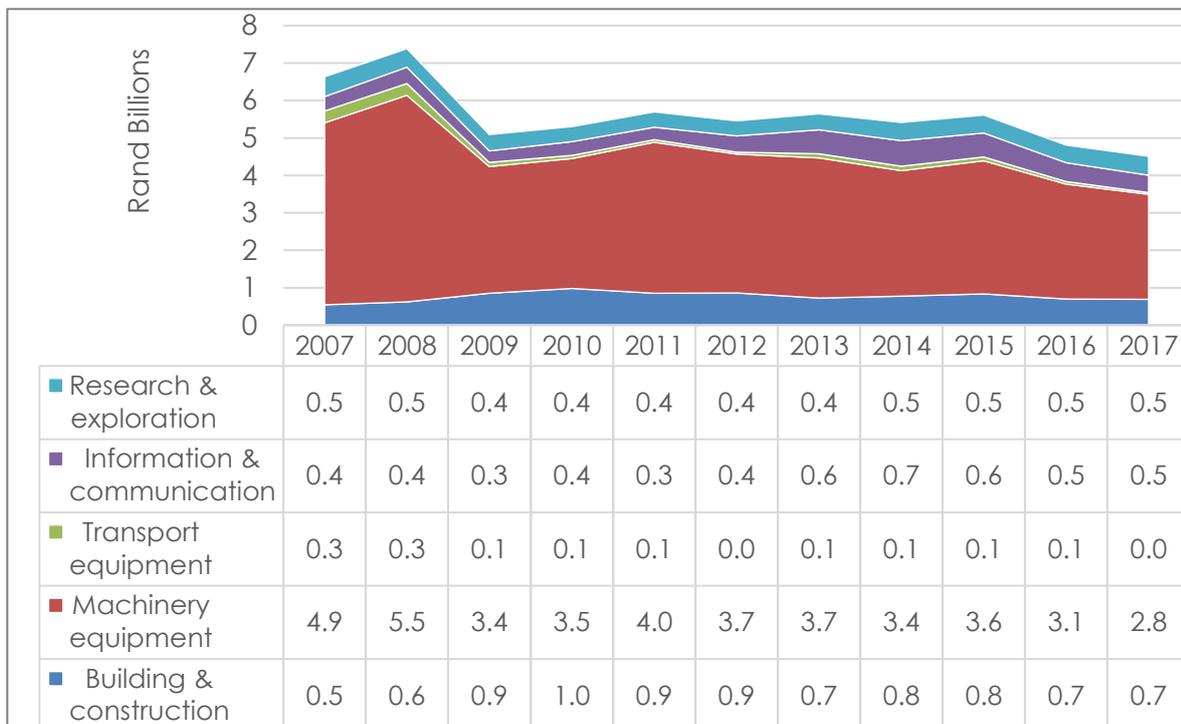
Investment in the WC's Food, Beverages and Tobacco (FBT) sector has also exhibited a real decline over the past 10 years, as shown below in Figure 31. This is slightly surprising given the good economic performance of the sector already observed, as well as the fact that the sector is less vulnerable to weather-related risks when compared to the AFF sector. The real decline over the period was experienced by both the food sub sector (-3.0% per annum) as well as beverages and tobacco (-4.8 % per annum).



**Figure 31: Investment (GFCF) in Western Cape FBT by Subsector, 2007-2017**

*Data Source: Quantec (2018)*

The main type of investment in the WC's FBT sector, shown in Figure 32 below, has historically been machinery and equipment, making up 62% of all investments in the sector in 2017 (down from 73% in 2007). Investment increased in real terms in relation to building and construction (+2.4% per annum) and information, research and exploration (+2.0% per annum). Transport equipment fell from R321 million in 2007 (2017 prices) to R48 million in 2017 (-17.3% per annum). Declines were also observed for investments in machinery equipment (-5.4% per annum) and research and exploration (-0.5% per annum).



**Figure 32: Investment (GFCF) in Western Cape FBT by Nature, 2007-2017**

*Data Source: Quantec (2018)*

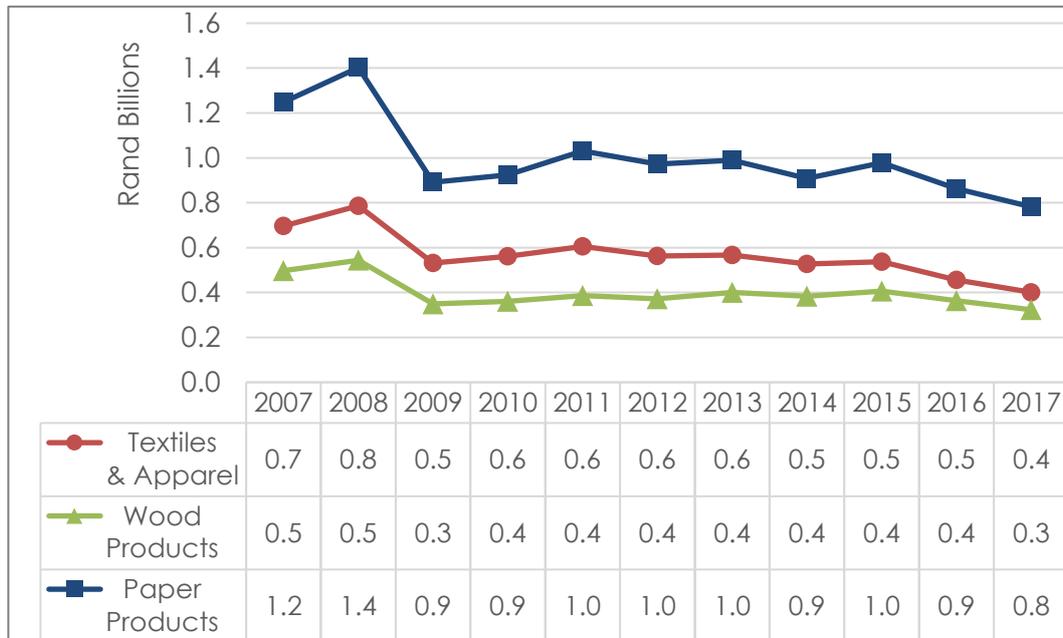
The geographic distribution of investment in the WC's FBT sector in Table 10 shows a strong concentration in the Cape Metropole. This level of concentration has also increased over the time as evidence from the District's share in total provincial investment in the sector increasing from 54% in 2007 to 60% in 2017. This was despite an absolute real decline in FBT investment in the region. FBT investment decreased for all Districts across the WC between 2007 and 2017, of particular note was the Cape Winelands where investment in the sector decreased by an average real annual rate of more than 8% per annum. Even at the municipal level there was only one of the twenty five Districts, Cape Agulhas, where FBT investment grew in real terms over the 10 year period (+0.4% per annum).

**Table 10: Geography of AFF Investment (GDFI), 2007-2017**

	2007		2016		2017		10y Annual Growth
	Rm	Share	Rm	Share	Rm	Share	
<b>City of Cape Town</b>	<b>3 592</b>	<b>54.2%</b>	<b>2 871</b>	<b>59.7%</b>	<b>2 721</b>	<b>60.3%</b>	<b>-2.74%</b>
City of Cape Town	3 592	54.2%	2 871	59.7%	2 721	60.3%	-2.74%
<b>West Coast</b>	<b>801</b>	<b>12.1%</b>	<b>693</b>	<b>14.4%</b>	<b>657</b>	<b>14.6%</b>	<b>-1.97%</b>
Matzikama	96	1.4%	62	1.3%	58	1.3%	-4.87%
Cederberg	80	1.2%	76	1.6%	71	1.6%	-1.06%
Bergrivier	110	1.7%	107	2.2%	100	2.2%	-1.01%
Saldanha Bay	278	4.2%	220	4.6%	210	4.7%	-2.78%
Swartland	237	3.6%	228	4.7%	218	4.8%	-0.86%
<b>Cape Winelands</b>	<b>1 607</b>	<b>24.2%</b>	<b>761</b>	<b>15.8%</b>	<b>681</b>	<b>15.1%</b>	<b>-8.22%</b>
Witzenberg	151	2.3%	101	2.1%	93	2.1%	-4.79%
Drakenstein	574	8.6%	251	5.2%	223	4.9%	-9.02%
Stellenbosch	458	6.9%	193	4.0%	171	3.8%	-9.38%
Breede Valley	187	2.8%	111	2.3%	102	2.3%	-5.88%
Langeberg	238	3.6%	105	2.2%	93	2.1%	-8.96%
<b>Overberg</b>	<b>184</b>	<b>2.8%</b>	<b>156</b>	<b>3.2%</b>	<b>148</b>	<b>3.3%</b>	<b>-2.15%</b>
Theewaterskloof	81	1.2%	66	1.4%	63	1.4%	-2.40%
Overstrand	69	1.0%	53	1.1%	50	1.1%	-3.17%
Cape Agulhas	18	0.3%	19	0.4%	19	0.4%	0.42%
Swellendam	17	0.2%	17	0.3%	16	0.4%	-0.19%
<b>Eden</b>	<b>437</b>	<b>6.6%</b>	<b>318</b>	<b>6.6%</b>	<b>296</b>	<b>6.6%</b>	<b>-3.83%</b>
Kannaland	36	0.5%	17	0.3%	15	0.3%	-8.57%
Hessequa	27	0.4%	24	0.5%	23	0.5%	-1.56%
Mossel Bay	80	1.2%	52	1.1%	48	1.1%	-5.06%
George	185	2.8%	140	2.9%	131	2.9%	-3.37%
Oudtshoorn	71	1.1%	54	1.1%	49	1.1%	-3.66%
Bitou	11	0.2%	10	0.2%	9	0.2%	-2.16%
Knysna	26	0.4%	21	0.4%	20	0.5%	-2.39%
<b>Central Karoo</b>	<b>10</b>	<b>0.2%</b>	<b>7</b>	<b>0.1%</b>	<b>7</b>	<b>0.1%</b>	<b>-4.23%</b>
Laingsburg	0	0.0%	0	0.0%	0	0.0%	-8.10%
Prince Albert	3	0.0%	2	0.0%	2	0.0%	-4.18%
Beaufort West	7	0.1%	5	0.1%	5	0.1%	-4.11%
<b>Western Cape</b>	<b>6 631</b>	<b>100.0%</b>	<b>4 806</b>	<b>100.0%</b>	<b>4 509</b>	<b>100.0%</b>	<b>-3.78%</b>

Data Source: Quantec (2018)

Figure 33 shows the investment in three additional sectors which have agri processing components to them, namely: textiles and apparel; wood products; and paper products. As already discussed, it is not possible with the available data to distinguish between the sub-sectors producing agri processing products and those processing synthetic materials. As such these trends should only be taken as indicative of what is happening in these broad sectors.



**Figure 33: Investment (GFCF) in WC Sectors with Agri Components, 2007-2017**

*Data Source: Quantec (2018)*

## 8. AGRICULTURAL INFRASTRUCTURE

Different production infrastructure is concentrated in different areas based on agricultural production in the region. Looking at the breakdown of infrastructure by municipality in Table 11, it is clear that the Cape Winelands is particularly well endowed in terms of infrastructure with the highest number of chicken batteries, homesteads, nurseries, piggeries and tunnels of all the Districts.

**Table 11: WC Agricultural Production Infrastructure, 2017**

	City of CT	West Coast	Cape Winelands	Overberg	Eden	Central Karoo	WC Total
<b>Airfields</b>	7	39	21	20	16	26	129
<b>Chicken Batteries</b>	82	7	143	41	5	0	278
<b>Dams*</b>	1 154	3 159	4 494	4 857	6 215	2 613	22 492
<b>Feedlots</b>	4	7	5	11	18	6	51
<b>Homesteads</b>	1 201	9 191	13 958	6 315	3 697	3 159	37 521
<b>Nurseries</b>	30	17	64	26	8	2	147
<b>Piggeries</b>	8	18	31	7	3	1	68
<b>Shade Netting</b>	42	673	388	207	62	5	1 376
<b>Tunnels</b>	25	73	93	36	3	1	231

Data Source: WCDoA (2018a)

\*2013 data used

The West Coast is also well endowed, particularly with regards to airfields and shade netting where the District's share in the provincial total stands at 30% and 49% respectively. Eden has the highest amount of dams, thanks largely to the high number of dams in Hessequa and George municipalities, and also the highest amount of feedlots.

Moving away from infrastructure necessary for production to look at facilities where different agricultural products can be processed, Table 12 shows the number of various processing facilities aggregated to the District level. Again different facilities are concentrated in different areas depending on what is produced locally, highlighting how development of agri processing facilities aids in the development of local producers.

Once again the Cape Winelands is very well set up with the highest number of pack houses, distilleries, fruit packers, cool chain facilities, olive cellars and unsurprisingly given the District name, wine cellars. The cellars have a particularly high concentration in the Cape Winelands which is home to 66% of the province's wine cellars and 66% of the province's olive cellars. It should be noted that all the facilities with high concentrations in the Cape Winelands are aimed at processing fruit.

The highest concentration was found in terms of tea processing where 96% of all processing facilities are in the West Coast District. This is the only product with the highest concentration in the West Coast District. The City of Cape Town boasts the highest number of breweries (61%) and millers (42%). The Overberg has the highest number of silos (37%), although only slightly higher than Eden (30%). Eden itself has the highest number of crushpens/diptanks

(41%) and dairies (50%). The Central Karoo has the most abattoirs (25%), but again only slightly higher than Eden (20%).

**Table 12: WC Agricultural Processing Infrastructure (number), 2017**

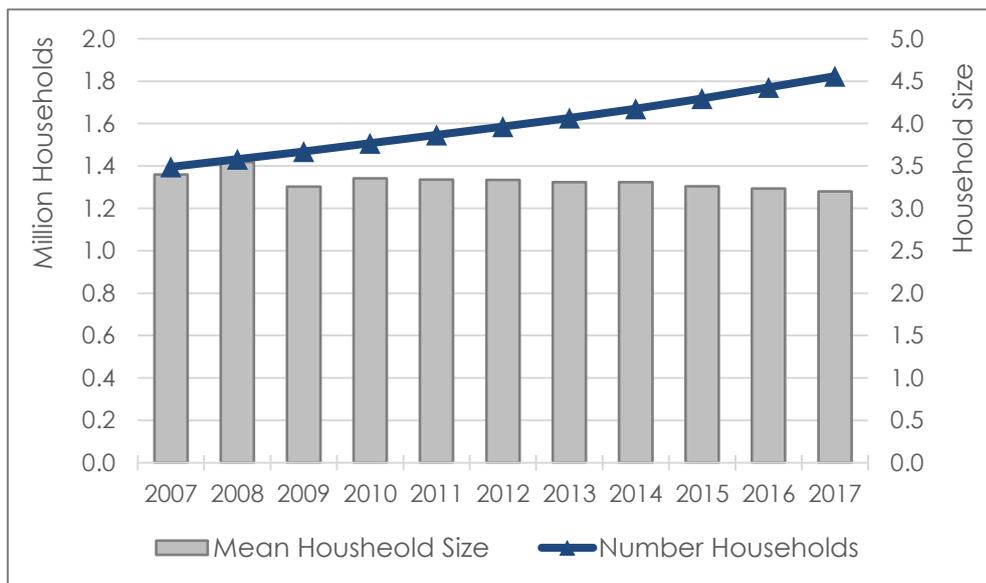
	City of CT	West Coast	Cape Winelands	Overberg	Eden	Central Karoo	WC Total
<b>Abattoirs</b>	7	10	9	8	12	15	61
<b>Crushpens/Diptanks*</b>	65	426	162	372	975	381	2381
<b>Dairies</b>	23	35	41	118	215	0	432
<b>Packhouses</b>	5	135	294	176	39	34	683
<b>Silos</b>	5	15	8	34	28	2	92
<b>Brewery</b>	31	2	15	2	1	0	51
<b>Distillery</b>	2	0	5	1	1	0	9
<b>Fruit Packers</b>	3	37	115	36	1	1	193
<b>Cool Chain</b>	36	32	66	36	1	1	172
<b>Millers</b>	10	3	7	2	2	0	24
<b>Olive Cellar</b>	6	3	42	6	2	5	64
<b>Wine Cellar</b>	54	24	309	64	13	3	467
<b>Tea Processing</b>	0	72	1	1	1	0	75
<b>Other Facilities</b>	94	32	37	36	19	4	222

Data Source: WCDoA (2018a)

\*2013 data used

## 9. DOMESTIC MARKET

The Number of Households in the WC has increased as the population has expanded (see "Section 1. Overview of the Western Cape"). This can be seen in Figure 34 which shows the number of households and average household size between 2007 and 2017 in the WC. In 2017 there were a recorded 1 823 412 households in the province. The increase from only 1 395 610 households in 2007 implies that each year on average an additional 42 780 households are added to the province. As the number of households has increased in the province, there has been a slight decline in the average household size, from 3.4 in 2007 to 3.2 in 2017.

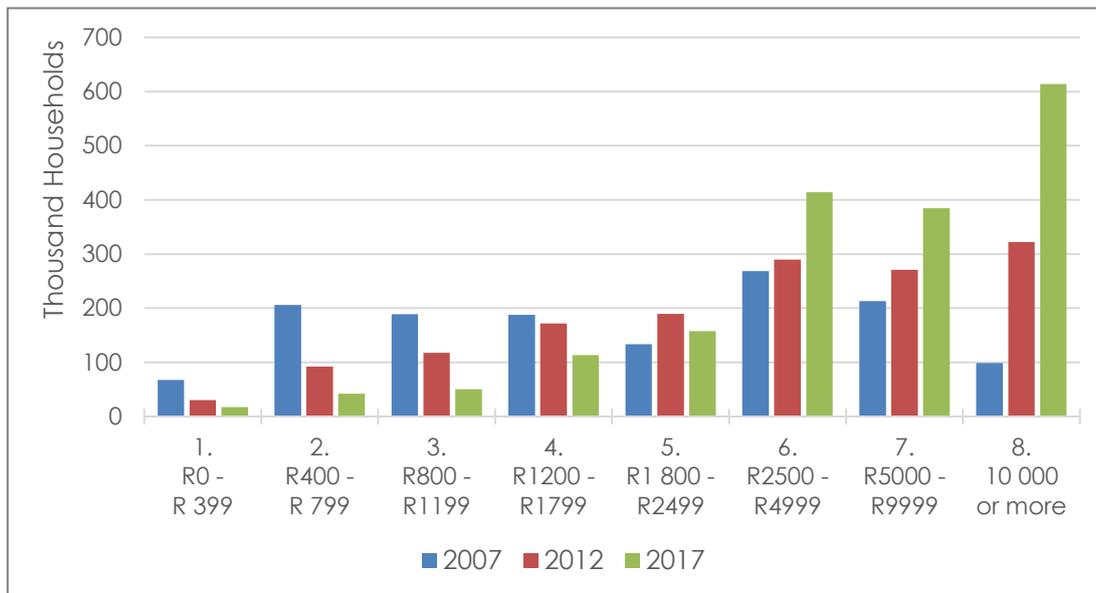


**Figure 34: Number Households and Average Household Size, 2007-2017**

*Data Source: Stats SA (2018c)*

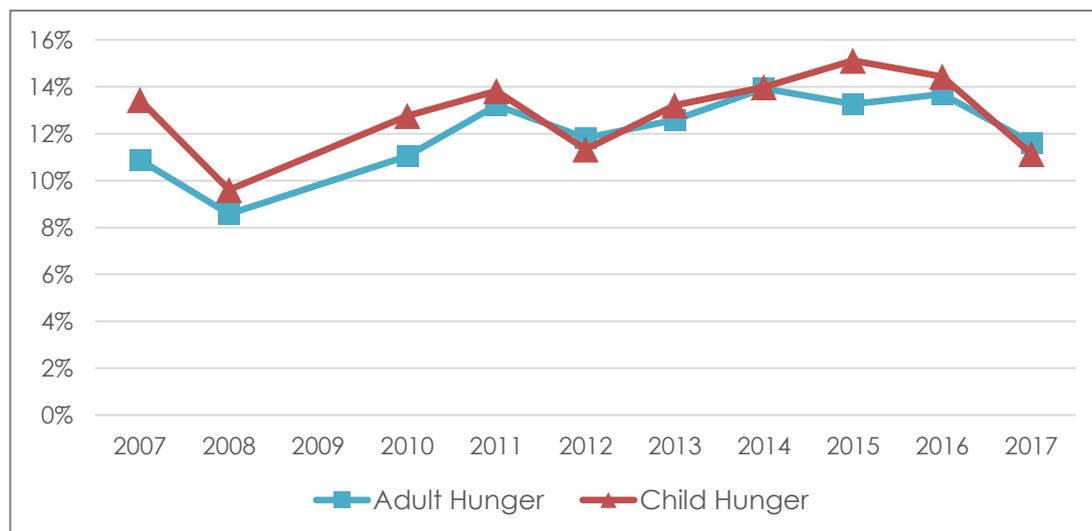
There has been upward movement in terms of expenditure as evidence in Figure 35 which shows the number of households in each bracket according to household expenditure. Due to the data only being provided in brackets, no conversion was able to be made with regards to inflation so values reflect nominal monetary values. However this is still a positive sign avoiding the very undesirable case where poor households are not able to increase their incomes as process rise.

The proportion of the WC population experiencing self-reported hunger at least sometimes has until recently been on the rise. This upward trend, shown in Figure 36, started in 2008 when only 8.6% of WC households were reported to have at least one adult who suffers from hunger ("adult hunger") and 9.6% were reported to have at least one child who suffers from hunger ("child hunger"). Both adult and child hunger rose from this point until 2014 where adult hunger peaked at 13.9% before declining. Child hunger peaked a year later in 2015 at 15.1% then also declined. In 2017 adult hunger was estimated at 11.6% and child hunger at 11.1%.



**Figure 35: Monthly Household Expenditure, 2007, 2012 & 2017**

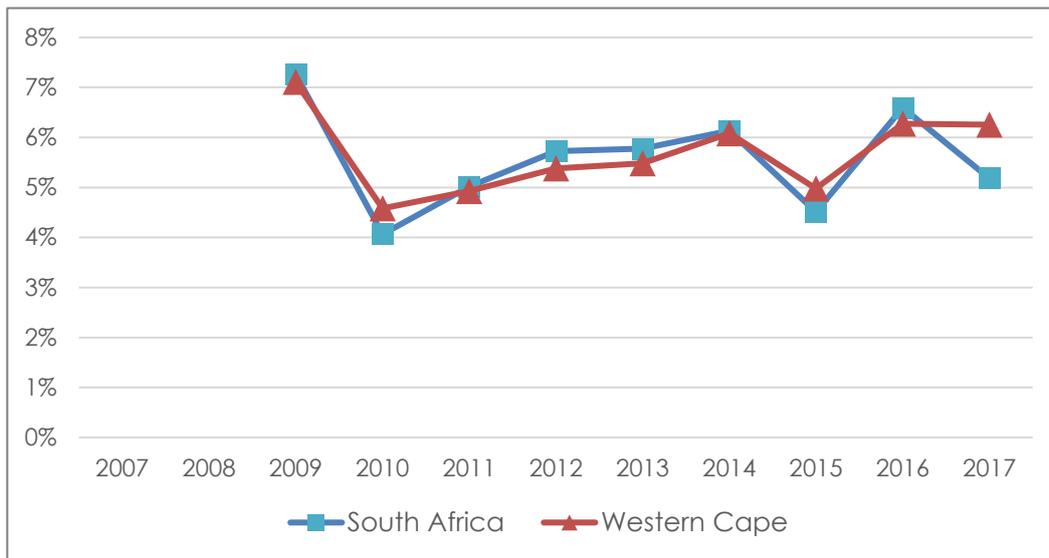
Data Source: Stats SA (2018c)



**Figure 36: Prevalence of Hunger in the Western Cape, 2007-2017**

Data Source: Stats SA (2018c)

Inflation in the WC has moved more or less with national inflation. The similarity can be seen in Figure 37 which shows national and provincial inflation. Due to data issues with the change in methodology used in calculating inflation in South Africa from 2008, comparable data was not available to 2008 and hence percentage changes could only be calculated for 2009 onwards in order to be strictly comparable.

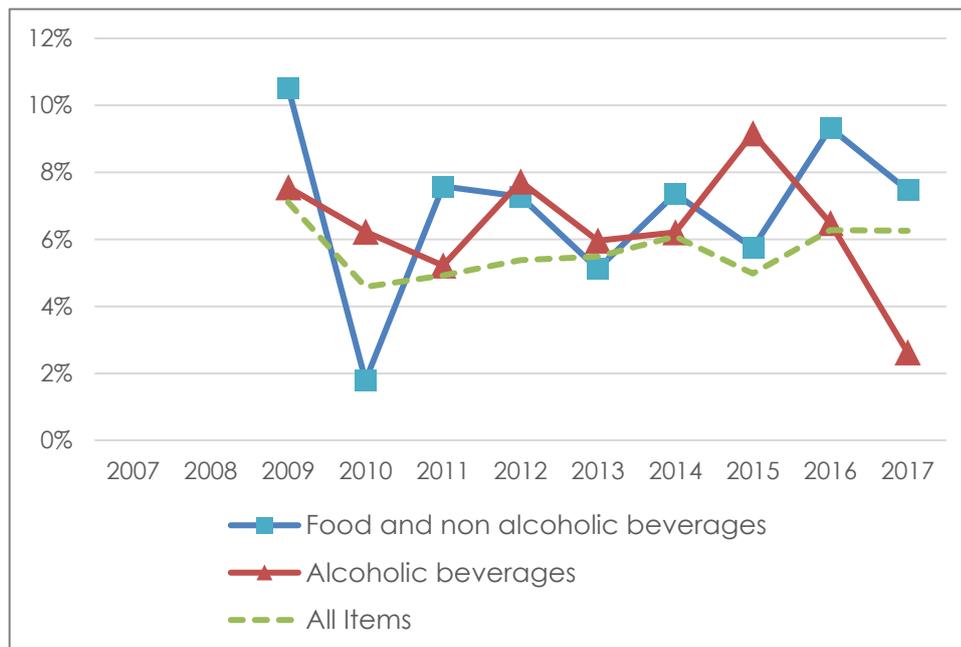


**Figure 37: National and Provincial Inflation (CPI), 2007-2017**

*Data Source: Stats SA (2018d)*

It is interesting to see the divergence of the two inflation trends for 2017. For all other years inflation in South Africa and the WC are quite similar, however in 2017 WC inflation significantly exceeds that of South Africa.

In recent years inflation on food and beverages has tended to be higher than on other items. This can be seen in Figure 37 which compares overall inflation with inflation on food and non-alcoholic beverages. The most notable exceptions are 2010 where there was a very low price increase on food and non-alcoholic beverages, and in 2017 where inflation on alcoholic beverages was only 2.6%.



**Figure 37: WC Food and Beverage Inflation (CPI), 2007-2017**

*Data Source: Stats SA (2018d)*

Table 13 shows the nominal changes in average prices of select agricultural products in local markets, annually from 2013 to 2017 as well as the average annual growth rate. These prices show the market prices so will be expected to fluctuate quite significantly and it should be noted that this does not necessarily reflect changes in prices received by producers. The province's CPI for all items and for food and beverages are also provided for comparative purposes.

**Table 13: Market Price Performance of Select Agricultural Products, 2013-2017**

	Annual % Change in Average Prices					5 Year Average
	2013	2014	2015	2016	2017	
WC CPI: Headline	5.5%	6.1%	5.0%	6.3%	6.3%	5.8%
WC CPI: Food & Beverages	5.1%	7.4%	5.7%	9.3%	7.5%	7.0%
Beef: Class A2/A3	-2.2%	13.3%	4.3%	10.4%	20.6%	9.0%
Beef: Class AB2/AB3	-2.7%	10.6%	6.6%	12.1%	22.7%	9.6%
Beef: Class B2/B3	-3.3%	10.3%	7.6%	11.8%	24.2%	9.8%
Beef: Class C2/C3	-6.6%	8.9%	11.0%	10.7%	28.8%	10.0%
Mutton: Class A2/A3	-4.9%	15.5%	8.0%	9.5%	22.3%	9.7%
Mutton: Class AB2/AB3	-4.3%	14.8%	7.4%	9.2%	22.2%	9.5%
Mutton: Class B2/B3	-7.8%	6.2%	8.2%	11.9%	21.3%	7.5%
Mutton: Class C2/C3	-8.4%	11.9%	10.3%	9.1%	22.8%	8.7%
Pork: Bacon	3.8%	11.9%	5.9%	6.7%	13.4%	8.3%
Pork: Pork	1.3%	11.4%	10.4%	3.1%	11.4%	7.4%
Pork: Sausage	1.1%	17.7%	10.3%	-6.1%	24.2%	8.9%
Pork: Average	3.3%	12.0%	6.3%	6.8%	13.0%	8.2%
Poultry: Frozen Class A	16.3%	10.1%	4.2%	0.3%	18.1%	9.6%
Poultry: Fresh	-8.9%	28.7%	15.8%	0.8%	16.0%	9.7%
Poultry: Eggs Gr. 1 Large	9.8%	9.4%	3.3%	3.6%	12.1%	7.6%
Wheat: Kansas City (Winter)	27.3%	-1.8%	-9.2%	-0.8%	-9.6%	0.4%
Wheat: Minneapolis (Spring)	27.2%	-1.8%	-9.2%	-0.8%	-9.6%	0.4%
Wheat: Safex	16.6%	0.0%	3.1%	10.1%	-5.0%	4.7%
Barley	17.9%	-7.6%	5.0%	34.7%	-19.6%	4.4%
Lemons	36.0%	34.5%	0.2%	-5.7%	-2.4%	11.0%
Oranges	-25.1%	66.3%	-20.5%	66.4%	10.0%	12.6%
Naartjies	17.3%	45.4%	12.6%	3.1%	1.9%	15.1%
Apples	4.2%	17.7%	-9.6%	7.5%	1.2%	3.8%
Pears	23.1%	2.5%	11.8%	2.9%	-7.9%	6.0%
Plums	-31.6%	156.5%	-1.9%	70.6%	-26.7%	16.6%
Peaches	-11.0%	0.2%	28.9%	21.0%	-6.1%	5.5%
Strawberries	-9.7%	-36.1%	45.9%	21.9%	29.4%	5.8%
Table Grapes	23.3%	6.7%	86.6%	33.8%	12.6%	29.9%
Onions	-55.2%	312.6%	1475.1%	94.3%	-37.5%	104.1%
Potatoes	24.0%	0.8%	-19.8%	73.2%	-26.7%	4.9%
Tomatoes	15.2%	21.7%	3.5%	-3.2%	-0.9%	6.9%

Data Source: WCDoA (2018c)

Meat products generally performed well in terms of prices in recent years. After 2014 only sausages in 2017 had a negative price change. All meat categories exceeded the five year annual averages for the two CPI's listed.

In addition to showing which products exhibited the strongest price increases Table 13 also highlights the products which are subject to the most price volatility. Generally products which have limited storing capacity, and hence are heavily influenced by seasonality and supply availability, tend to be more volatile. For example orange prices are highly volatile, especially compared to products such as apples and pears which can be stored for a full year with the right infrastructure.

It is also worth noting that although onions had price increases of extremely large magnitudes, the unit price of onions is very low, so the price increase of 1475% in 2015 was a jump from an average price of R0.17 per kilogram to R2.70 per kilogram. This is a phenomenal jump in relative terms but is only a net increase of R2.53 per kilogram, far less than the increase in potato prices between 2015 and 2016 where the 73% increase equates to a net increase of R20.18 per kilogram.

## 10. AGRI TOURISM

Table 14 shows the geographic spread of agri tourism activities in the WC. For the more general outdoor activities there is quite an even spread across the Districts. These activities would include birding, camping, ecotourism, fishing, hiking and mountain biking. The exception District is the City of Cape Town where, asides from ecotourism, there are far less of these general activities.

**Table 14: WC Agri Tourism Enterprises (number), 2017**

	City of CT	West Coast	Cape Winelands	Overberg	Eden	Central Karoo	WC Total
<b>4x4 Facilities</b>	5	32	19	15	28	48	147
<b>Accommodation</b>	51	162	443	221	145	129	1151
<b>Birding</b>	4	49	44	38	26	49	210
<b>Breweries</b>	17	7	26	8	0	1	59
<b>Camping</b>	11	66	42	30	29	34	212
<b>Cellars &amp; Wine Shops</b>	16	5	109	20	4	3	157
<b>Conference &amp; Functions</b>	53	42	256	82	27	22	482
<b>Ecotourism</b>	24	38	47	43	41	53	246
<b>Farm Market</b>	9	7	21	15	3	1	56
<b>Farm Stall</b>	4	19	54	23	23	12	135
<b>Fishing</b>	10	34	50	45	29	23	191
<b>Hiking</b>	26	90	108	121	55	72	472
<b>Horse Riding</b>	8	10	55	24	17	22	136
<b>Mountain Bike</b>	13	49	89	89	45	55	340
<b>Ostrich</b>	2	0	4	0	3	0	9
<b>Picnics</b>	20	37	126	48	31	73	335
<b>Quad Bike</b>	2	10	13	13	8	17	63
<b>Restaurant</b>	53	42	256	82	27	22	482

*Data Source: WCDoA (2018a)*

The Cape Winelands has the most number for 13 of the 18 activities. The highest concentrations were for cellars and wine shops (69%), conference functions (53%), and restaurants (53%). The Central Karoo has the highest for 4 of the remaining 5 activities with a particularly high concentration in terms of 4x4 facilities (33%). The only activity where the highest concentration is not in the Cape Winelands or Central Karoo is camping where the West Coast has the highest share (31%). It should be noted however that the West Coast also has the joint highest number of birding facilities with the Central Karoo (each 23%) and that the Overberg has the joint highest amount of mountain bike trails with the Cape Winelands (26%).

## 11. CONCLUSION & POLICY IMPLICATIONS

This Western Cape Agricultural Sector Profile for 2018 has provided an up to date account of the agriculture and agri processing sectors of the Western Cape for the preceding decade (2007-2017). There has been a significant increase in the population of the Western Cape (WC) with residents mainly concentrated in the City of Cape Town Metropole.

The province's GVA grew in real terms between 2007 and 2017, from R497 billion to R567 billion (values inflation adjusted to 2017 prices). However, the contribution of the province to the national economy has dwindled from 14.7% to 13.6% over the same ten-year period. This means that relative to the national economy, the WC economy grew at a slower pace.

The sectors with the largest contribution to the province's GVA are business services; trade and hospitality; and manufacturing. Agriculture's contribution to the economy is currently 3.9% of provincial GVA. However, a large share of the national output in Agriculture, Forestry and Fisheries (AFF) (21%), and Food, Beverage and Tobacco (FBT) (20%) is from the Western Cape Province. The West Coast and Cape Winelands districts account for approximately 58.3% of the province's agricultural GVA. The former district accounts for 40% of the province's grains, oil seeds and lupines, and 45% of vegetables and tobacco. Whereas the latter district accounts for more than 55% of orchards in the province. The City of Cape Town and Eden districts account for 62% of Forestry GVA, and the City of Cape Town alone accounts for 60% of Food and more than 60% of Beverages and Tobacco GVA.

The land area used for crop production in the WC is approximately 2 million hectares, with the main crops being wheat, wines grapes, and several other high value crops. The preference towards high value crops is reflective of the province's competitive advantage, as well as of the perceived opportunities for agricultural producers.

Agricultural land transferred via land markets totalled 538 0303 ha in 2017, which is the highest since 2009 when 542 847 ha were transferred. More than 50% of the land traded in 2017 was in the Central Karoo. However, in terms of the number of transactions in each district for that year, Eden is leading at 327 transactions for the year, then Cape Winelands at 207.

The top exported agricultural products from the WC are wine, citrus, table grapes and pome fruit. The export performance of these industries is essential to growth of the economy as well as job creation. The WC province accounts for more than 50% of the country's exports in the Agricultural, Forestry and Fisheries sector and the province has consistently managed to achieve a positive and increasing trade balance in the sector. The same applies for the Food Beverages and Tobacco sector, although increasing imports in this sector have meant that the trade balance has not increased in the same way as for the Agriculture, Forestry and Fisheries Sector.

The major export destinations for the WC's Agriculture, Forestry and Fisheries products are the United Kingdom and the Netherlands, together accounting for 33%. The UAE and Hong Kong have also become increasingly important. The province's share of Food, Beverage

and Tobacco exports to African countries in the past ten years has increased from 15% to 44% and imports from these neighbouring countries has decreased from 74% to 60%.

This report has also revealed gains made in agricultural employment up until 2015. However, this has been somewhat eroded in the face of the recent drought as evidenced by a significant decline in seasonally adjusted provincial employment in the WC's Agricultural, Forestry and Fisheries Sector. By the end of 2015 employment in the sector totalled 232 319, but this fell to 187 044 by the end of 2017. The gains made prior to the drought should be highlighted by the fact that despite this contraction employment still stands higher than it ever was prior to 2015.

In the case of Food, Beverages and Tobacco sector, the province created an average of 6 581 new jobs each year during the period 2010 to 2017. The combined employment for Agriculture, Forestry and Fisheries, along with Food, Beverages and Tobacco at the end of 2017 stood at 302 732, which is 12.3% of the WC's total employment.

The number of household practising subsistence farming in the WC has increased over the past ten years. Crop farming is the most common practice, followed by animal farming and mixed farming. The animals mostly farmed by households is chicken, then a combination of chickens with other animals such as cattle, sheep, goats and pigs.

Investment in the province's Agriculture, Forestry and Fisheries sector fell from R4.6 billion to R4.0 billion during the period 2007 to 2017 (2017 prices). However, sub-sector level data shows an increase in investment into both forestry and fisheries. The changes in investment flows differed across the different municipalities, although less so for food, beverages and tobacco where investment declined in real terms for almost every local municipality. Real declines in investment were also observed for the province's textiles and apparel sector and for wood and paper products, both of which have agri processing elements.

Agri-tourism activities are widespread in the WC. These activities include birding, camping, farming markets, hiking, fishing and farm stalls. These activities attract people from all over the world, as well as local "tourists".

Much of the changes in the Western Cape Agricultural sector outlined in this report need to be viewed in light of existing agricultural policies, frameworks and department strategic goals as outlined in key documents of government. In general there are definite causes for optimism within the sector, however there are also obvious challenges which will make the growth path of the sector challenging and one which will require all parties to remain informed and able to act timeously on the information they receive.

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