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Agriculture

Western Cape Agriculture Sector Profile | 2024

WESTERN CAPE AGRICULTURAL SECTOR PROFILE

2024

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Western Cape Department of Agriculture

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ABBREVIATIONS

AAMP : Agriculture and Agro-processing Master Plan

AfCFTA : African Continental Free Trade Area

AGOA : African Growth and Opportunity Act

CMAs : Catchment Management Agencies

DWS : Department of Water and Sanitation

FBT : Food, Beverage, and Tobacco

GFCF : Gross Fixed Capital Formation

GVA : Gross Value Added

G4JS : Growth for Jobs Strategy

Ha : Hectare

NDP : National Development Plan

SPI : Standard Precipitation Index

SPEI : Standard Precipitation Evaporation Index

WC : Western Cape

WCDoA : Western Cape Department of Agriculture

WMAs : Water Management Areas

Executive Summary

The Western Cape Agricultural Sector Profile 2024 provides a comprehensive, data-driven overview of the province's agricultural economy. The Western Cape (WC) agricultural landscape is characterised by distinct regions farming horticulture crops, field crops and livestock. The West Coast and Overberg are central to the province's grain, oilseeds, and lupine production, with the West Coast contributing 41% of the total area under these crops, while the Overberg accounts for 33%. The WC agricultural exports increased from R68.2 billion in 2023 to R73.8 billion in 2024, driven by key sectors such as fruit, wine, and other processed food products. The WC contributed a significant share of 54% to South Africa's total agricultural exports.

The Western Cape is home to 12% of South Africa's population and remains a critical contributor to national agricultural output, exports, and employment. A large portion of the provincial population resides in the City of Cape Town (64%), Cape Winelands (12%), Garden Route (11%), West Coast (7%), Overberg (5%) and Central Karoo (1%). In 2024, approximately 41 000 households involved in non-commercial agriculture were producing fruit and vegetables for subsistence purposes.

Despite fluctuations due to declining investment and the gross value added, the share of agricultural employment as a proportion of the total provincial workforce has remained relatively stable at 8% and 7% between 2023 and 2024, respectively. However, going forward, it will be important to prioritise investment in the agricultural and agri-processing to grow the sector and unlock more employment opportunities.

The special focus chapter, based on the commercial agriculture survey, shows that the WC is the single largest generator of commercial agricultural income in the country. The horticultural sub-sector accounts for over half of gross farming income in the province. Moreover, the WC is South Africa's major producer of wine grapes, peaches, apples, canola and pears, and also the leading employer in commercial agriculture, accounting for just over a quarter of the national workforce.

Introduction

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1. INTRODUCTION

Agriculture forms the backbone of the economy. The National Development Plan (NDP) has identified agriculture as having the potential to create 1 million jobs in 2030 (NPC, 2011). This importance of this sector is also highlight in the South African Agriculture and Agro processing [1]Master Plan (AAMP) which serves as a blueprint for guiding the country's economic recovery. It focuses on several key objectives including: increasing food security, expediting sustainable transformation in the agriculture and agro-processing sectors, improving access to local and export markets, supporting farmers, enhancing the resilience to effects of climate change and promoting sustainable management of natural resources (DoA, NAMC, BFAP, & CCRED, 2022).

The trade environment has been volatile due to geopolitical tensions and supply chain disruptions. Maintaining existing exports market and diversifying to new one is crucial for agribusiness sustainability. The African Continental Free Trade Area (AfCFTA) has great potential to boost intra-African trade, but it requires investment in trade facilitation reduce non-tariff barriers and harmonising trading systems (OABS & WCDoA, 2022).

In the Western Cape (WC), the Growth for Jobs Strategy (G4JS) outlines a plan for the province to achieve substantial economic growth and create at least 6000 new jobs by 2035 (WCG, 2023).Ongoing assessment of the agricultural landscape is also needed to understand supply and demand dynamics. Hence, agricultural economic and statistical data are essential for analysing sector trends and informing effective planning and decision-making.

This report analyses the performance of WC agricultural sector based on available data. It covers various topics, including the economy, land use, trade, employment, subsistence farming, investment, infrastructure, domestic markets, agri-tourism and water use. Additionally, there is a special focus chapter on the WC Commercial Agriculture Survey conducted by Statistics South Africa. The report concludes with a set of recommendations.

[1] "Agro-processing refers to the sub-sector of the manufacturing that beneficiates primary materials and intermediate goods from agricultural, fisheries and forestry based sectors."((DTIC, 2025))

Overview of the Western Cape

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2. OVERVIEW OF THE WESTERN CAPE

The WC is one of the nine provinces in South Africa, situated along South Africa's southwestern coast (Figure 2.1) and is the fourth-largest province by area. It is divided into 24 municipalities and one metropolitan municipality, grouped into six districts. Each district has distinct characteristics contributing to the province's agricultural landscape. The WC province features a Mediterranean climate along the coast, characterised by wet winters and dry summers, while the inland areas experience semi-arid conditions. This climatic diversity distinguishes the WC from the predominantly summer-rainfall region of South Africa.

The province's climatic conditions, combined with diverse topography that includes high mountain ranges, fertile valleys, extensive coastal zones, and arid interior regions, create an environment conducive to varied agricultural activities. The WC is a prominent hub for both primary production and value-added agri-processing[2], supported by sophisticated infrastructure and advanced technologies. This allows for the stable production of a wide range of high-quality crops, livestock, and other agricultural commodities.

The region is renowned for producing various horticultural products, including deciduous fruits, table and wine grapes, citrus, and vegetables. Livestock farming, including sheep, cattle, and ostriches, is also significant, particularly in semi-arid areas. The WC's agricultural sector not only supports local consumption but also underpins export-driven industries, bolstering its position as a key contributor to South Africa's economy.

[2] *Agri-processing refers to "All post-harvest activities applied to products that originate from primary agriculture, forestry and fisheries which involve the transformation, preservation and preparation of products for intermediary and final consumption to make them usable as food, feed, fibre or industrial raw materials. This includes waste and waste products."* (Pienaar & Partridge, 2015)

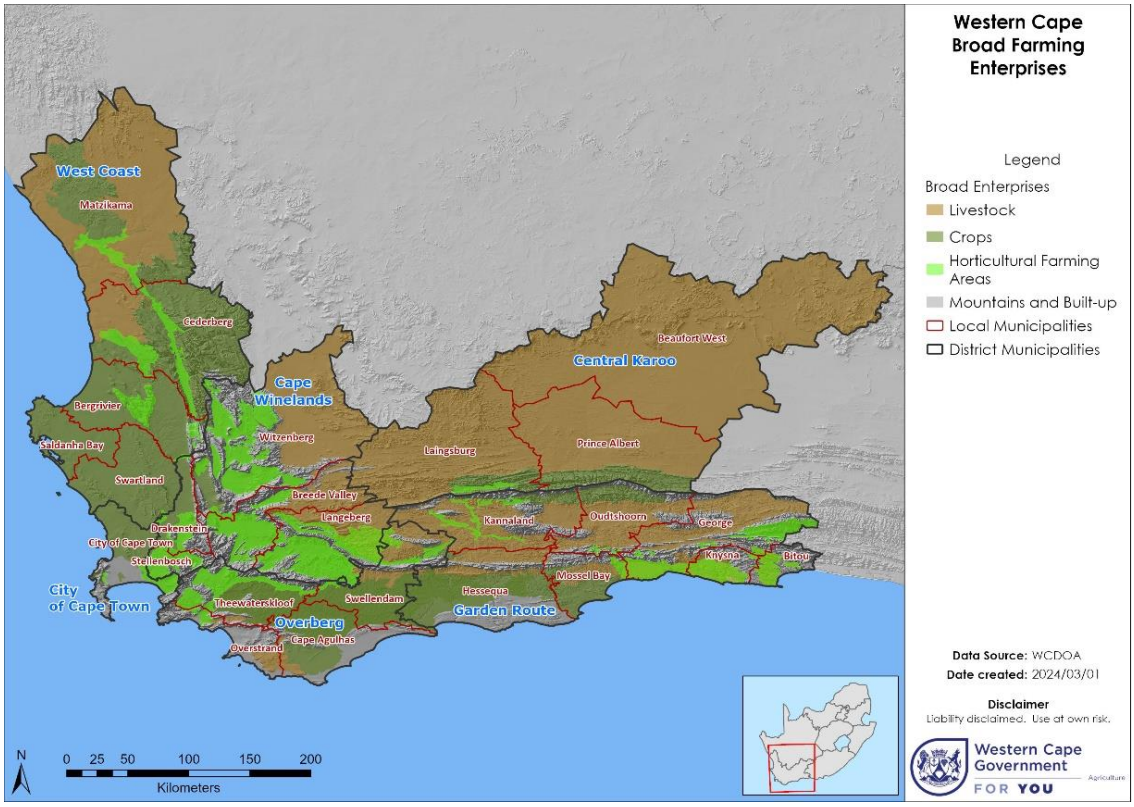

Figure 2.1: Western Cape province broad farming enterprises, South Africa
Source: (WCDoA, 2024)

The WC experienced consistent population growth from 2014 to 2024. During this decade, its population increased from approximately 6.33 million to 7.50 million people, which represents a total growth of about 1.16 million residents. Despite this substantial growth in absolute numbers, the province's share of South Africa's overall population is relatively stable between 11% and 12% throughout the period, as indicated by the grey bars in Figure 2.2. Additionally, the population grew by 117 249 people between 2023 and 2024.

The absolute population numbers reveal that the WC and South Africa in general both had steady growth patterns, and that the national population increased from 54.83 million to 62.32 million over the same time frame, which is why the province's relative percentage remained steady even if its absolute portion was very large. The WC's average growth rate was approximately 1.7% per year, which is a faster growth rate than the national average of 1.3%. The trajectory of growth improved during the period's latter years.

This trend suggests that while the province maintained its demographic momentum through factors such as economic opportunities, urbanisation, and internal migration, the province itself grew at a pace roughly consistent with national rates of population increases, neither significantly gaining nor losing ground relative to other provinces but rather maintaining its share in proportion to South Africa's total demographic landscape.

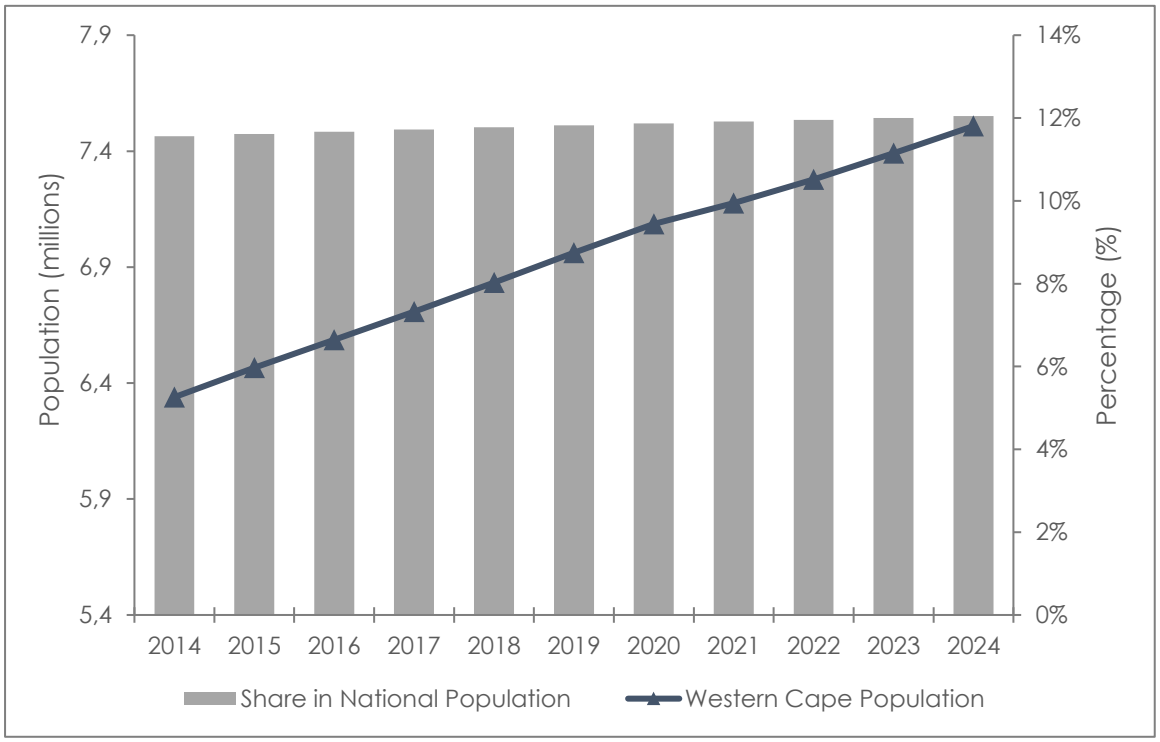

Figure 2.2: WC absolute and relative population trends, 2014-2024
Source: StatsSA, 2025; (Quantec, 2025)

Figure 2.3 illustrates how the WC population is distributed across the six districts in 2014 and 2024, showing both growth and shifting demographic patterns in the decade. It can also be observed that the City of Cape Town remained the leading in terms of the share of the population in the province, rising by a slight margin from 65% to 66% . The Cape Winelands municipality, relative share decreased from 14% to 13% . The West Coast municipality remained constant at 7% of the provincial population, and Eden (also known as Garden Route) maintained its 9% share, Central Karoo and Overberg captured minimal shares at 4% and 1%, respectively

The figure shows that while some of the districts increased in numbers over the ten years, the City of Cape Town continued to grow, absorbing more of the province's increasing population. This is characteristic of urbanisation in which metropolitan areas grow faster than rural areas, and the City of Cape Town's economic future and infrastructure continue to be a draw for people from within the province and other areas, further strengthening its position as the WC's leading demographic and economic centre.

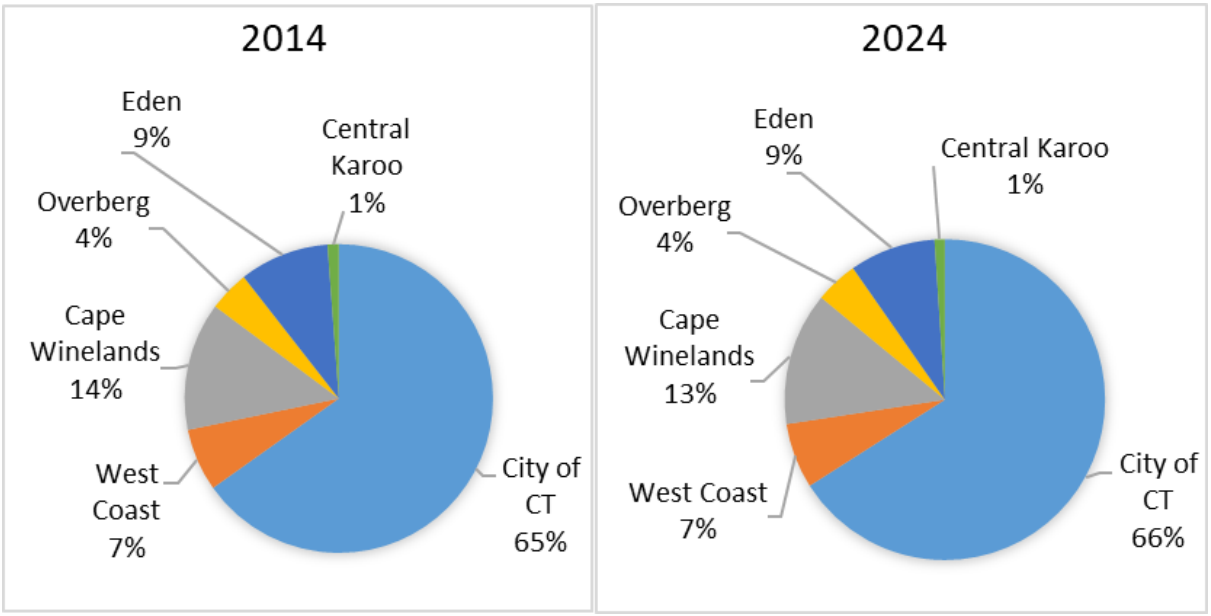

Figure 2.3: WC population by district, 2014 vs 2024
Source: (Quantec, 2025)

Figure 2.4 displays the WC's population by age and gender distribution for 2024, showing several distinctive population trends that mirror larger socioeconomic trends in the province. The pyramid shape of Figure 2.4 shows a relatively narrow base of approximately 262 288 females and 272 289 males aged 0-4, and 261 183 females and 271 239 males aged 5-9. A large share of population increase is observed among those aged between 30-39 years, presenting both male and female populations, with males at the peak of 355 518 among the 35-39 years and females with a high presence, 343 335, also among the 35-39 age group.

While males marginally outnumber females in most of the age groups and dominate more strongly in the middle working ages 25-44, females show greater longevity in the older age groups, clearly so in the 75-79 band. The working-age bulge in the cohorts 25-45 suggests high in-migration of economically active adults, most likely drawn by the economic opportunities, particularly in Cape Town, of the WC. The relatively small

cohorts of the 45-64 age brackets, with even smaller oldest groups, result in a relatively barrel-shaped instead of pyramid-shaped profile. This population profile shows that the WC is benefiting economically from a high percentage of the working-age population.

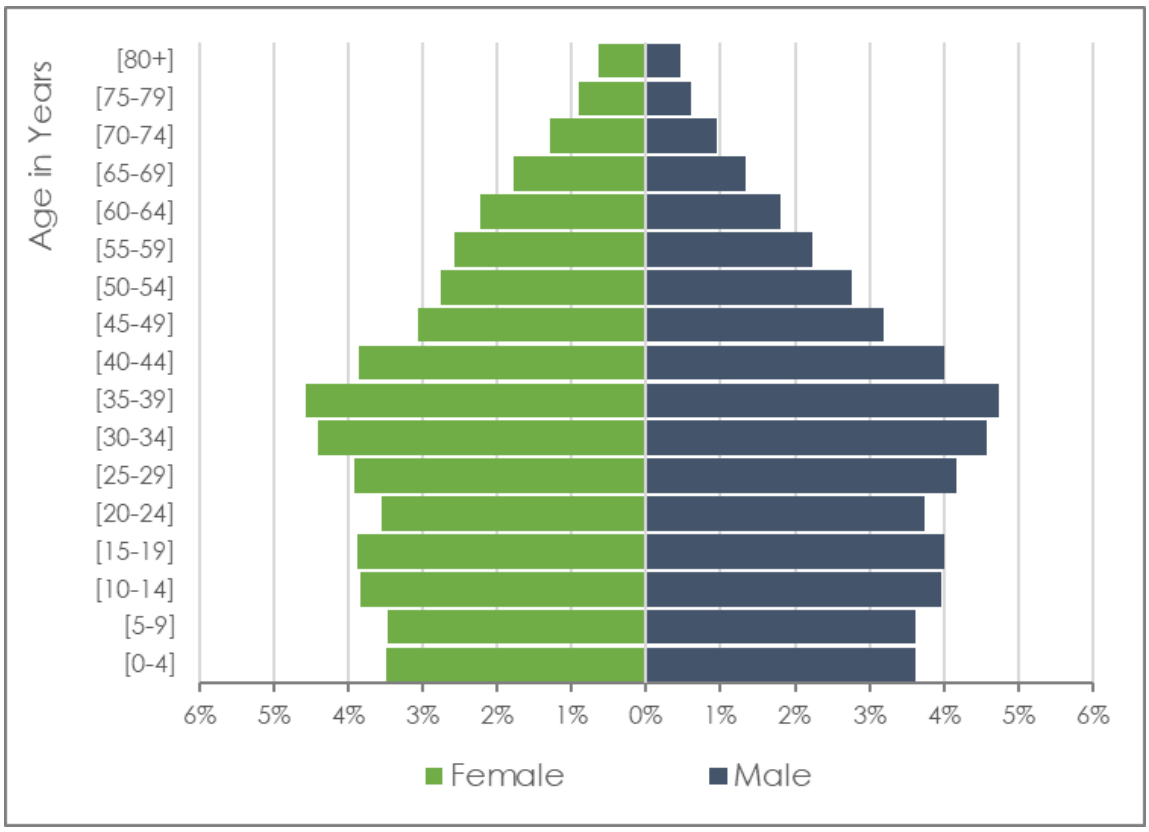

Figure 2.4: WC population distribution by age and gender in 2024
Source: (Quantec, 2025)

Figure 2.5 illustrates the WC's consistent economic contribution to South Africa, averaging 14% of the national economy from 2014 to 2024. Over this period, the provincial economy demonstrated resilience with an annual average growth rate of 1% (measured at constant 2015 prices), highlighting its importance to the country's economic framework. From 2014 to 2020, the WC economy followed a growth trajectory, peaking at R585 billion in 2019. However, the COVID-19 pandemic caused a sharp contraction in 2020, with the provincial GDP declining by 6% to R553 billion, reflecting the widespread disruptions to economic activities, including trade, tourism, and other key sectors.

The recovery post-2020 has faced multiple hurdles. Domestic power outages (load-shedding) have strained production and investment, while delays at ageing port facilities disrupted the province's export-dependent sectors, such as agriculture and manufacturing. Additionally, social unrest and geopolitical tensions in major trade markets further impeded growth.

Despite these challenges, the WC economy has shown signs of recovery since 2021, though progress has been slow. This highlights the need for investments in resilient infrastructure, energy security, and diversification of trade markets to strengthen economic recovery and ensure long-term stability.

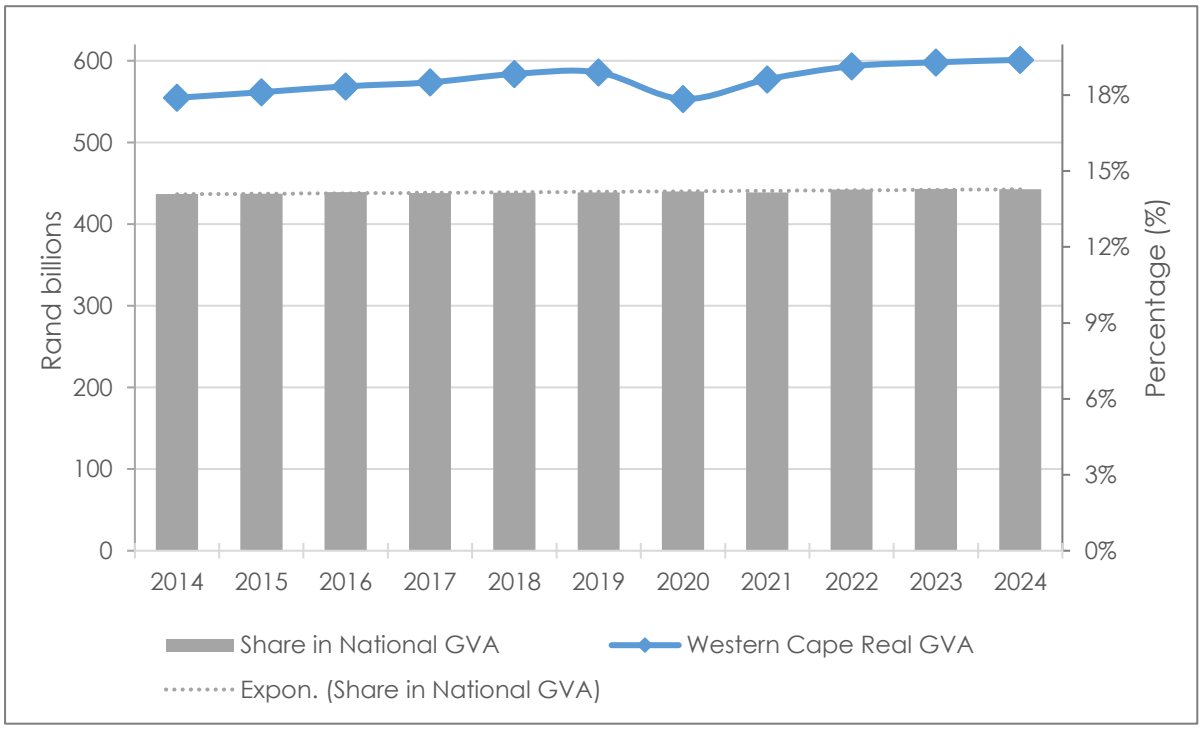

Figure 2.5: WC contribution to national gross value added (GVA)
Source: (Quantec, 2024a)

Figure 2.6 presents a detailed sectoral breakdown of the WC economy, highlighting each sector's economic contribution and growth between 2023 and 2024. The largest sectors are business services, encompassing finance, real estate, and professional services at 38.9%, followed by wholesale (incl. retail, trade, catering and accommodation) at 15%, which play a pivotal role in driving the province's economic growth. The WC is also a preferred tourist destination, attracting both locals and international visitors (WCG, 2024).

In 2024, only a few sectors experienced growth, reflecting the broader economic challenges. The financial services, agri-processing, utilities and wholesale sectors, sustained by a recovery in tourism and logistics, experienced marginal growth.

The agricultural sector, a critical component of the WC economy, experienced a slight contraction of 0.4%, primarily attributed to adverse weather conditions, escalating input costs, and disruptions in export logistics. In comparison, the agri-processing sector grew by 0.2%. The contrast between the economic reduction in primary agriculture and the growth in agri-processing signals the growth in value addition of agricultural products, driven by higher demand, technological progress, and a generally growing secondary sector in the province.

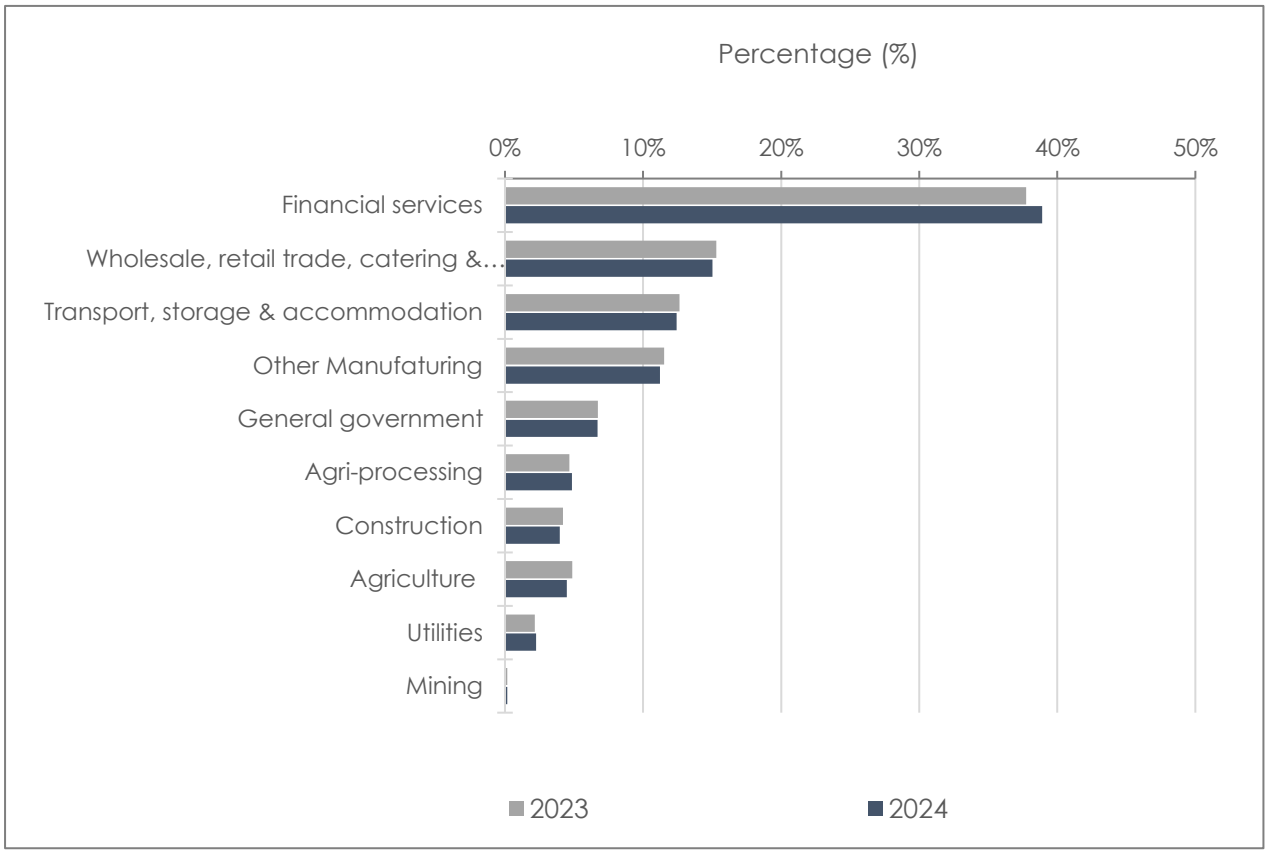

Figure 2.6: Sectoral contribution to the WC GVA
Source: (Quantec, 2024b)

Summary points

- WC increased by an additional 117 249 people between 2023 and 2024.
- Over the past decade, the province's annual average growth rate of 1.7% has been higher than the national population average growth of 1.3%.
- Females constitute a larger share of 51% of the provincial population.
- The agri-processing sector grew by 0.2%, signalling the growth in value addition of agricultural products driven by increased demand, technological gains and generally a growing secondary sector in the province

Agricultural Production

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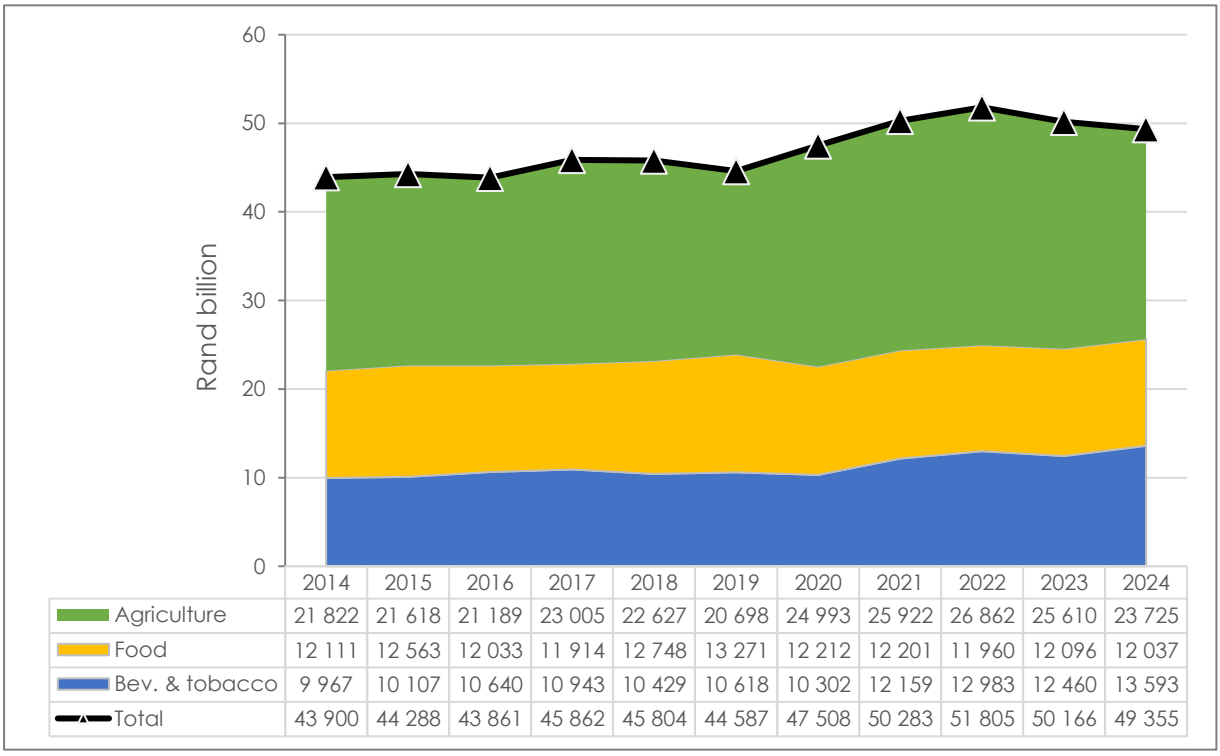
3. AGRICULTURAL PRODUCTION

Agriculture in the WC is predominantly commercial. Figure 3.1 illustrates the economic performance of the WC's agriculture sector (incl. forestry and fisheries), food, beverage and tobacco (FBT) from 2014 to 2024. Over the past 10 and 5 years, agriculture grew at an annual average growth rate of 1% and 2.8% respectively. However, from 2023 to 2024, the gross value added (GVA) declined from R25.6 billion to R23.7 billion, respectively, reflecting an annual decline of 7.4% (R1.8 billion). This decrease can be attributed to several challenges, including high input prices and extreme environmental conditions such as floods. The food industry also declined by 0.5% (equivalent to R58 million) in 2024, and its average annual growth rates decreased to 1.93% and 0.06% for the past 10 and 5 years, respectively. In contrast, the beverage and tobacco industries experienced an annual growth of 9.1%, a positive annual average growth of 5.1% in the past 10 years and 3.2% over the past 5 years. Combined, the agriculture and FBT industries recorded a 1.6%% decrease in GVA (equivalent to R811 million) in 2024 compared to 2023.



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Agriculture	21 822	21 618	21 189	23 005	22 627	20 698	24 993	25 922	26 862	25 610	23 725
Food	12 111	12 563	12 033	11 914	12 748	13 271	12 212	12 201	11 960	12 096	12 037
Bev. & tobacco	9 967	10 107	10 640	10 943	10 429	10 618	10 302	12 159	12 983	12 460	13 593
Total	43 900	44 288	43 861	45 862	45 804	44 587	47 508	50 283	51 805	50 166	49 355

Figure 3.1: WC real GVA in primary agriculture & agri processing
Source: (Quantec, 2025)

Figure 3.2 highlights the WC's consistent contribution to South Africa's national agriculture and agri-processing sectors over the past decade. Despite facing significant challenges, including severe floods, the outbreak of COVID-19 in 2020 and persistent electricity disruptions caused by load-shedding, the province's share of the national agriculture and agri-processing economy remained stable at approximately 16% and 21%, respectively. The WC's agricultural sector continues to be a critical player in the sector, producing a diverse array of high-value horticultural products. Similarly, the province's agri-processing sector, driven by its strong FBT industries (e.g. wine), continues to contribute to employment and foreign earnings through export. This stability amid adversity underscores the resilience and strategic importance of the WC in the broader South African agricultural economy. Key factors contributing to this performance include advanced farming practices, a well-established supply chain, effective collaboration among key stakeholders, and continued efforts to address bottlenecks created by ports to enhance the flow of exports through the Port of Cape Town and others.

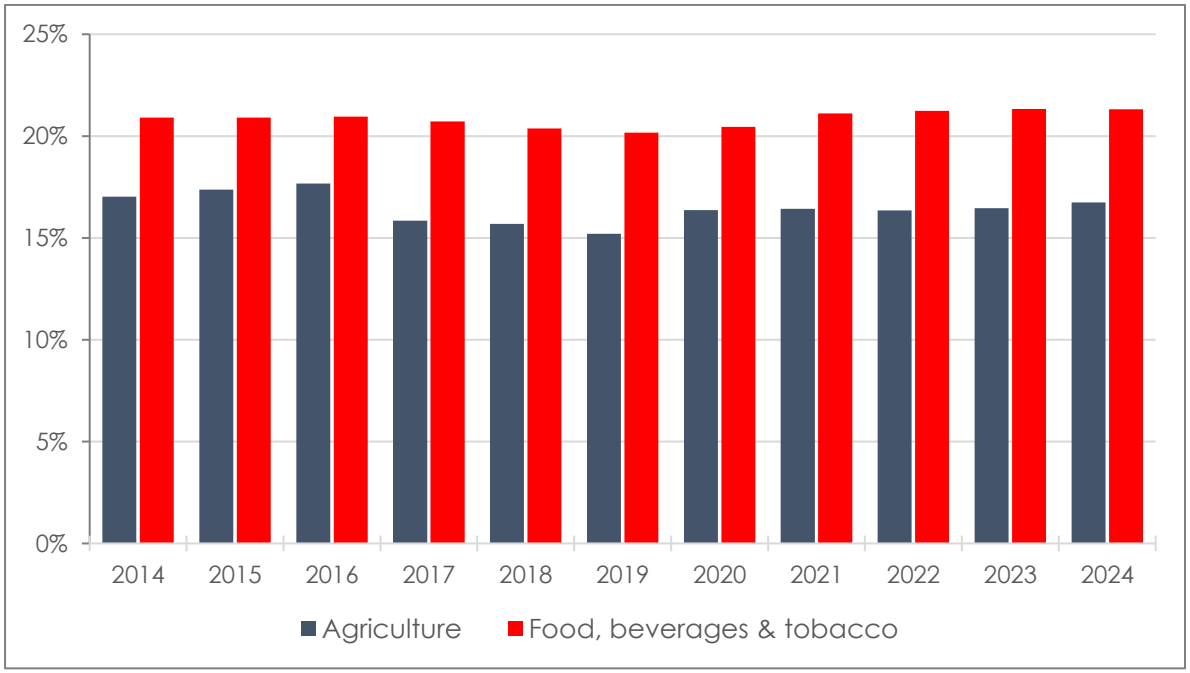


Figure 3.2: WC share in national agriculture and agri-processing GVA
Source: (Quantec, 2025)

Table 3.1 highlights the geographic distribution of Gross Value Added (GVA) for agriculture, food, beverage and tobacco industries within the WC in 2024. The Cape Winelands district remains the largest contributor to the province's agricultural

income, accounting for 33.4%, driven by its extensive wine grapes, other fruit farming and agri-processing activities. The West Coast follows with a 24.8% share, reflecting its strengths in grain production, livestock farming, and fisheries. The City of Cape Town contributes 18.1%, benefiting from urban-based processing and export-oriented activities. The Garden Route (Eden) adds 10.6%, Overberg 10.4%, and the Central Karoo 2.8%, reflecting their specialised contributions to niche markets and regional food systems.

Table 3.1: WC agriculture and agri-processing GVA share by district and municipality in 2024

	Agriculture		Food		Beverages & Tobacco
City of Cape Town	***18,1%***		***59,2%***		***65,0%***
City of Cape Town	18,1%		59,2%		65,0%
West Coast	***24,8%***		***16,5%***		***12,5%***
Matzikama	5,9%		1,2%		1,3%
Cederberg	3,7%		2,4%		0,6%
Bergrivier	6,4%		3,4%		0,7%
Saldanha Bay	1,6%		3,6%		5,9%
Swartland	7,2%		5,9%		4,1%
Cape Winelands	***33,4%***		***12,6%***		***14,9%***
Witzenberg	7,5%		2,4%		1,4%
Drakenstein	8,1%		3,5%		5,7%
Stellenbosch	4,8%		2,6%		4,4%
Breede Valley	7,7%		2,2%		1,8%
Langeberg	5,2%		1,8%		1,6%
Overberg	***10,4%***		***3,8%***		***2,6%***
Theewaterskloof	1,5%		0,4%		0,3%
Overstrand	6,8%		1,7%		1,1%
Cape Agulhas	1,1%		1,2%		0,9%
Swellendam	1,0%		0,6%		0,3%
Garden Route	***10,6%***		***7,7%***		***4,9%***
Kannaland	1,2%		0,3%		0,2%
Hessequa	2,0%		0,6%		0,3%
Mossel Bay	1,0%		1,2%		0,6%
George	3,3%		3,4%		2,4%
Oudtshoorn	1,9%		1,3%		0,8%
Bitou	0,6%		0,3%		0,1%
Knysna	0,6%		0,6%		0,4%
Central Karoo	***2,8%***		***0,2%***		***0,1%***
Laingsburg	0,6%		0,0%		0,0%
Prince Albert	0,6%		0,0%		0,0%
Beaufort West	1,5%		0,1%		0,1%

Source: (Quantec, 2025)

The City of Cape Town continues to dominate the food and beverage & tobacco sectors, supported by a high population and its urban infrastructure. In contrast, the Garden Route and Overberg regions, which recorded marginal improvements in their beverage & tobacco shares, signal localised growth in specific processing industries. These shifts underline the dynamic nature of regional contributions and highlight opportunities for targeted interventions to address regional disparities and optimise the province's overall agri-economic performance.

Summary points

- Over the past 10 and 5 years, agriculture grew at an annual average growth rate of 1% and 2.8% respectively. However, from 2023 to 2024, the gross value added (GVA) declined from R25.6 billion to R23.7 billion, respectively, reflecting an annual decline of 7.4% (R1.8 billion).
- Combined, the agriculture and FBT industries recorded a 1.6%% decrease in GVA (equivalent to R811 million) in 2024 compared to 2023.
- The province's share of the national agriculture and agri-processing economy remained stable at approximately 16% and 21%, respectively.
- The Cape Winelands district remains the largest contributor to the province's agricultural income, accounting for 33.4%, driven by its extensive wine grapes, other fruit farming and agri-processing activities. The West Coast follows with a 24.8%.

Agricultural Land

4

4. AGRICULTURAL LAND

Over the past six years, the WC has experienced a significant expansion in the area under crop production, with the total area under cultivation increasing by 32% (256 204 hectares) to approximately 1 045 763 hectares in 2023. Figure 4.1 highlights the top ten crops in the province based on area size and compares areas under cultivation between 2017 and 2023. Wheat production, a staple crop in the region, expanded by 7% (23 231 hectares), due to a conducive environment, and reflects increased demand and favourable market conditions. Oats, a versatile crop for feed and food, saw the most significant growth, with a substantial addition of 151 557 hectares, indicating its rising importance in the province's crop mix. Canola, a valuable oilseed crop, experienced a remarkable 48% increase (43 hectares), driven by its profitability and role in crop rotation systems. Barley, a key ingredient for the brewing industry, grew by 27% (23 188 hectares), likely supported by demand from both local and export markets.

Conversely, the area under wine grapes decreased by 12% (10 586 hectares) during the same period. This decline may be attributed to shifting market dynamics, changing consumer preferences, and challenges such as drought conditions and export disruptions. The overall increase in cultivated area underscores the province's agricultural dynamism and its ability to adapt to changing economic and environmental conditions. However, the decline in wine grape cultivation highlights the need for strategic interventions to support the wine industry and diversify market opportunities.

The WC's agricultural landscape is characterised by distinct regional specialisations in crop production. The West Coast and Overberg are central to the province's grain, oilseeds, and lupine production, with the West Coast contributing 41% of the total area under these crops, while the Overberg accounts for 33%. This region's suitability for grain farming, particularly wheat and oilseeds such as canola, is enhanced by its climate and soil conditions. In addition to grains and oilseeds, the West Coast is also the province's primary vegetable-producing area, accounting for 51% of the total vegetable production. The region is particularly well-suited for the cultivation of crops like potatoes, onions, and carrots. Furthermore, the West Coast plays a dominant role in the production of tobacco, teas, and hops, with 98% of the province's area under

these crops located here, largely due to its status as the major rooibos-growing region. Meanwhile, the Cape Winelands district, known for its diverse agricultural production, is home to over half of the province's orchards (57%). This area's favourable climate makes it ideal for fruit cultivation, particularly wine grapes, apples, pears, and citrus fruits.

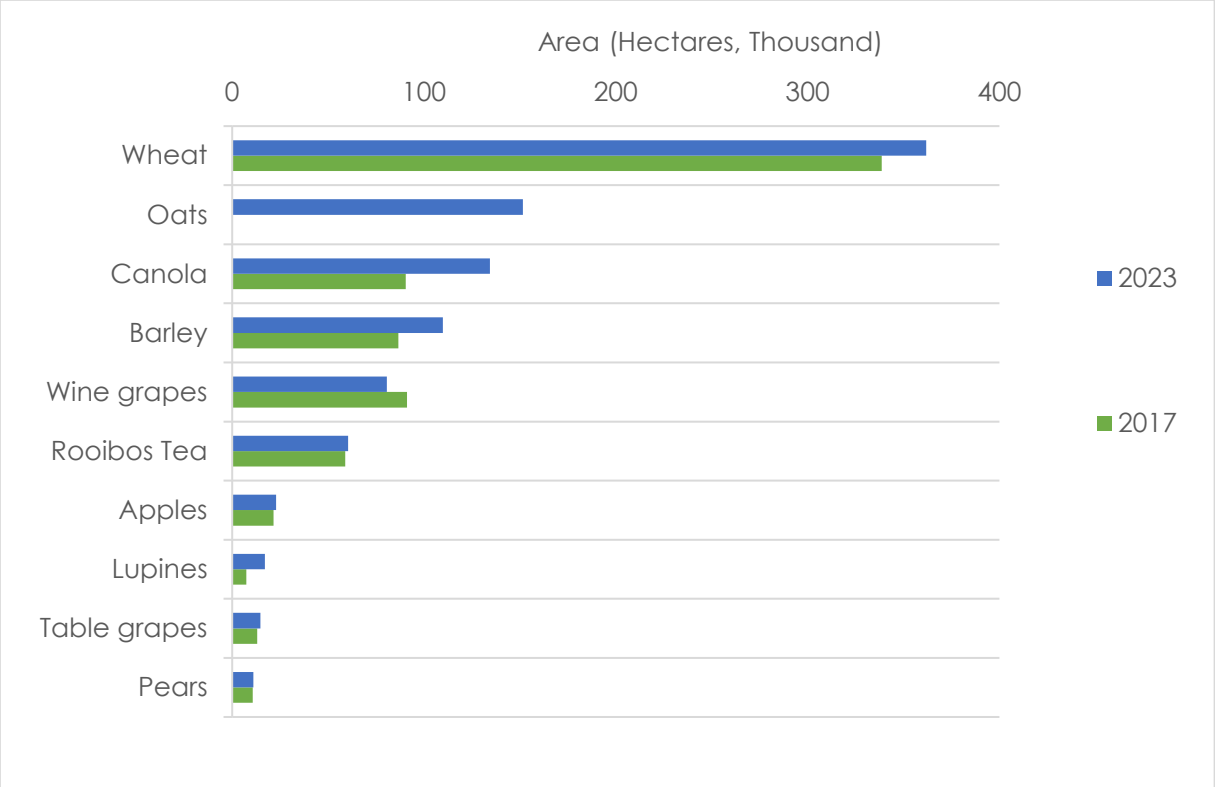


Figure 4.1: Top WC crops by area planted
Source:(SIQ, WCDoA & OABS, 2024)

***Version no.3 flyover dataset*[3]

Table 4.1 provides a comprehensive breakdown of broad crop categories cultivated in each municipality of the WC during the 2022/2023 growing season. The table underscores the specialised agricultural activities in each region, highlighting the strategic importance of local conditions in shaping the province's agricultural output. The diverse agricultural activities across the WC reflect the adaptability of the region's farming systems and the importance of tailoring production to regional strengths.

[3] *"Note: The 2023 iteration/update had an increased reliance on remote sensing (RS) to distinguish annual winter cropping (e.g. wheat, barley, oats, triticale, Canola, lupins, lucerne/medics), which was not the case with the previous update of the data. Excludes area under livestock farming.*

Table 4.1: Geographic spread of WC crops planted, 2023

WC district & municipalities	Grain, oil seeds, lupines	Orchards	Tobacco, tea & hops	Vegetables	Total
Cape Winelands	**52 175**	**100 809**	**21**	**5 237**	**158 242**
Breede Valley	1 868	24 387	-	428	26 683
Drakenstein	24 964	16 075	21	219	41 279
Langeberg	6 793	22 948	-	496	30 236
Stellenbosch	1 801	13 546	-	30	15 377
Witzenberg	16 750	23 853	-	4 064	44 666
Central Karoo	**2 088**	**481**	**-**	**360**	**2 929**
Beaufort West	540	60	-	19	619
Prince Albert	1 385	115	-	18	1 518
Laingsburg	163	306	-	323	792
City of Cape Town	**23 120**	**4 869**	**-**	**1 580**	**29 569**
City of Cape Town	23 120	4 869	-	1 580	29 569
Garden Route	**131 781**	**9 084**	**786**	**1 650**	**143 302**
Bitou	510	437	104	28	1 079
George	7 374	3 760	481	629	12 244
Hessequa	103 737	1 084	25	59	104 906
Kannaland	2 749	1 977	10	249	4 986
Knysna	432	211	-	138	782
Mossel Bay	10 260	1 162	-	173	11 595
Oudtshoorn	6 718	453	166	374	7 711
Overberg	**257 497**	**21 462**	**148**	**574**	**279 681**
Cape Agulhas	83 124	590	39	4	83 757
Overstrand	4 595	1 177	61	45	5 877
Swellendam	85 816	2 706	48	190	88 760
Theewaterskloof	83 962	16 990	-	336	101 288
West Coast	**321 062**	**40 970**	**60 394**	**9 614**	**432 040**
Bergrivier	100 710	6 085	17 095	3 078	126 967
Cederberg	13 609	12 794	34 310	4 099	64 812
Matzikama	8 594	10 140	6 365	1 977	27 077
Saldanha Bay	33 898	48	1 649	28	35 623
Swartland	164 251	11 903	976	431	177 561
Total	**787 723**	**177 676**	**61 349**	**19 014**	**1 045 763**

*Source: (SIQ, WCDoA & OABS, 2024) (**Version no.3 of the flyover data)*

The WC's farmland market has demonstrated consistent activity over the past decade, with approximately 780 transactions per annum from 2013 to 2023 (WCDoA, 2024). This steady demand for farmland in rural areas has also contributed to a notable increase in the average unit price per hectare, reflecting the changing dynamics of agricultural land markets. As shown in Figure 4.2, the average price for farmland increased from R8 000/ha in 2013 to almost R24,000/ha in 2023, with the price averaging R12 000/ha between 2013 and 2019. This steady upward trend in land prices reflects both the consistent demand for farmland and broader market factors such as inflation and rising agricultural productivity.

However, the onset of the COVID-19 pandemic marked a significant turning point in the market. With many people re-evaluating their lifestyles, the appeal of rural living grew, driving a surge in demand for agricultural land. This demand spike is evident in Figure 4.2, where the average unit price of land surged from R14 000/ha in 2019 to R28 000/ha by 2021. The dramatic rise was further compounded by a reduction in the volume of available land on the market, leading to inflated prices as competition for rural properties increased.

By 2022, the market began to stabilise, with land prices dropping to R25 000/ha in 2023. This price correction suggests that the initial post-COVID surge in demand is gradually subsiding, as supply-demand dynamics adjust. Notably, the Central Karoo, with its large-scale farms, experienced the highest volume of land transactions, with nearly 45 000 hectares changing hands. In contrast, the Cape Metropole saw minimal activity, with only 286 hectares sold, reflecting its more urbanised landscape and limited availability of agricultural land.

Between 2014 and 2024, the WC experienced significant fluctuations in both the number and value of agricultural land transactions. According to the latest data (Table 4.2), the total number of transactions across six districts (Central Karoo, Overberg, Eden, Cape Metropole, Cape Winelands, and West Coast) varied considerably over the period. The highest volume of transactions occurred in 2018, with 934 recorded deals. This was closely followed by 2017 and 2016, which saw 870 and 840 transactions, respectively. The Eden district consistently reported the highest number of transactions throughout the decade, peaking at 355 in 2022. In contrast, the Cape Metropole recorded the fewest transactions, particularly in 2017 (5 transactions) and 2019 (2 transactions).

Table 4.2: Number of Agricultural Land Transactions by District, 2014-2024

Year	Central Karoo	Overberg	Eden	Cape Metropole	Cape Winelands	West Coast	Total
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
2018	79	147	324	10	224	150	934
2019	69	118	301	2	161	127	778
2020	21	64	149	7	113	63	417
2021	29	54	288	4	142	122	639
2022	36	134	355	4	51	34	614
2023	18	41	79	7	68	52	265
2024	20	47	131	6	71	56	331

Data Source: WCDoA (2025b)

However, from 2020 onward, a marked decline in transactions was observed, likely due to external economic shocks and uncertainty. The lowest point came in 2023 with just 265 transactions, followed by a modest recovery to 331 in 2024. Figure 4.2 represents aggregate values adjusted to 2024 prices. This figure would provide critical insights into how land value trends correspond to transaction volumes. For example, a low number of transactions in certain years might still correlate with high aggregate values, reflecting increased per-hectare prices or larger property sizes sold.

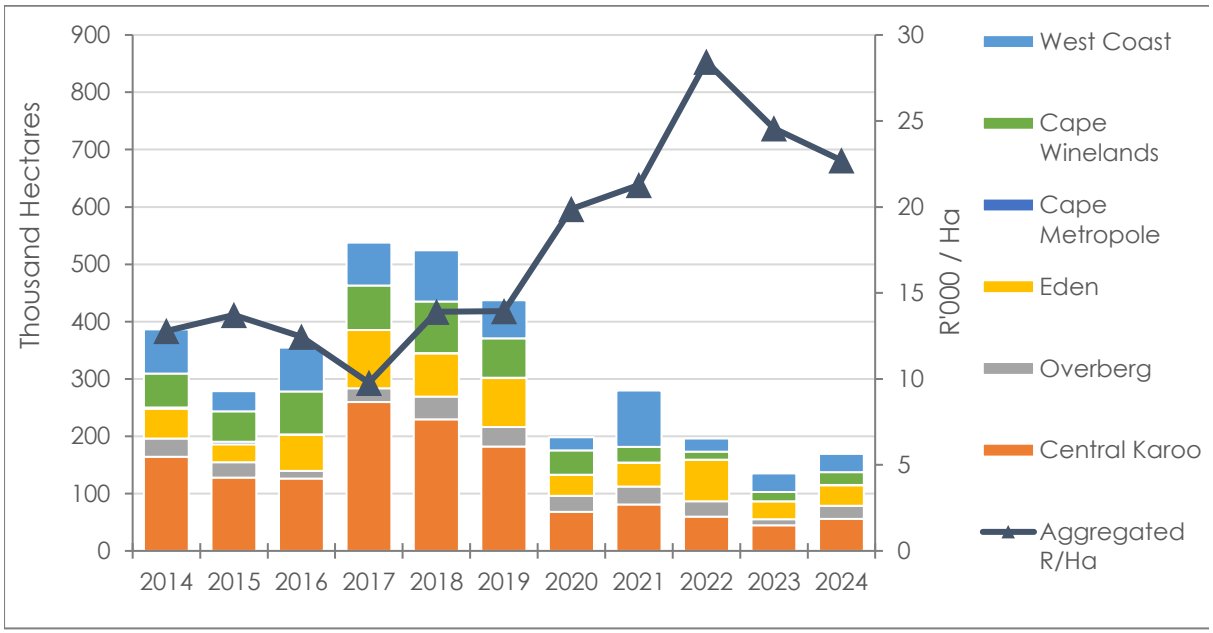


Figure 4.2: Agricultural Land Transferred and Aggregate Value, 2014-2024

Data Source: WCDoA (2025b)

Overall, the decade reveals a cyclical pattern of activity influenced by market conditions, with Eden and Cape Winelands being the most active districts in both the number and value of land transactions.

Summary points

- The number of sales transactions rose by 25% from 2023 to 2024, but is still below the average of the previous years.
- Agricultural land values rose marginally from the previous years and seem to show a recovery that may be motivated by a drop in the lending rate.

Agricultural Trade

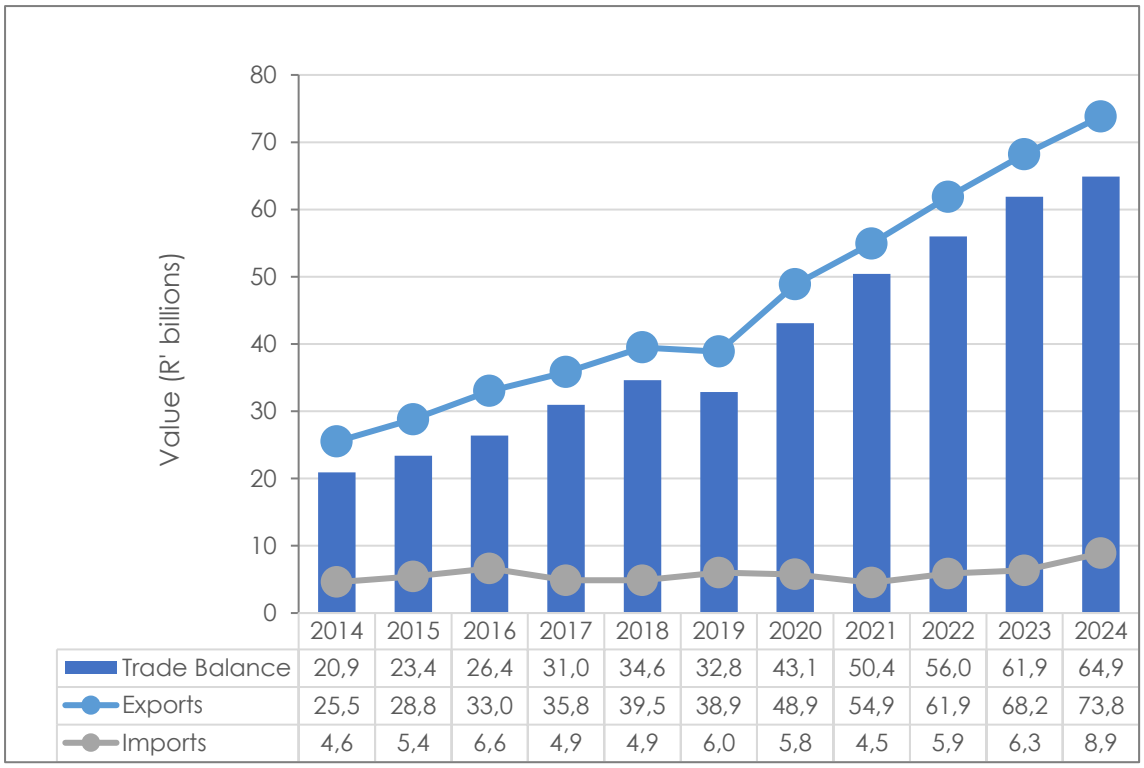
5

5. AGRICULTURAL TRADE

Over the past decade, the WC's agricultural sector has maintained a strong and competitive export market orientation, despite facing a myriad of significant challenges. These challenges included logistical bottlenecks at seaports, inadequate road infrastructure, the global markets and value chains disruptions caused by the COVID-19 pandemic, animal disease outbreaks, environmental disasters and climate change effects, geopolitical tensions, and emerging trade wars. Despite these hurdles, WC agricultural exports have grown substantially, showcasing the sector's resilience and competitiveness in the global market stage. This growth is a testament to the sector's adaptability, resilience, and ability to meet the demands of international and domestic markets, with key exports remaining in high demand.

Table 5.1 highlights the biggest WC agricultural and agri-processing exports by value, illustrating the continued strength and the resilience of the province's export economy. Agricultural exports increased from R68.2 billion in 2023 to R73.8 billion in 2024, driven by key sectors such as fruit, wine, and other processed food products. These exports continue to form a significant portion of the province's agricultural foreign income, farm incomes and profits, and investments. Therefore, underscoring the importance of international trade for the province's economic stability and growth. On the import side, agricultural imports to the WC have remained relatively stable over the same observed period, with a slight dip in 2021, followed by an increase in the subsequent years until 2024 marketing year. Agricultural imports rose from R6.3 billion in 2023 to R8.9 billion in 2024, reflecting the ongoing demand for certain agricultural products not produced locally, including products that are expensive to produce domestically or inputs like fertilizers and seeds for primary production.

Despite the increase in agricultural imports, the trade balance for the sector continues to widen, indicating that the WC's agricultural export sector remains a net contributor to the provincial and national economy. This widening trade balance highlights the sector's robust, present, and competitive position in international markets and its importance to the broader economic landscape of the province.

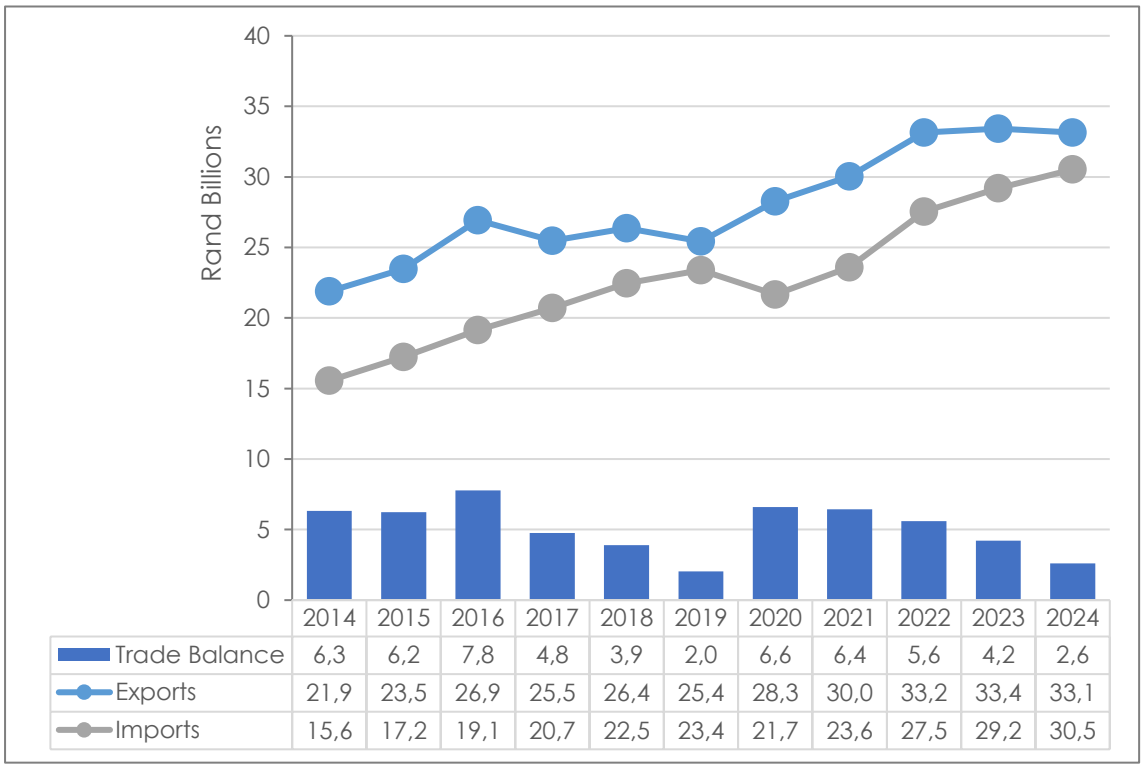


	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Trade Balance	20,9	23,4	26,4	31,0	34,6	32,8	43,1	50,4	56,0	61,9	64,9
Exports	25,5	28,8	33,0	35,8	39,5	38,9	48,9	54,9	61,9	68,2	73,8
Imports	4,6	5,4	6,6	4,9	4,9	6,0	5,8	4,5	5,9	6,3	8,9

Figure 5.1:WC agricultural trade, 2014-2024
Source: (Quantec, 2024a)

The FBT sector of the WC has demonstrated a positive economic performance over the past decade, reflecting a steady growth trajectory in exports. As indicated in Table 5.2, which outlines the fastest-growing agricultural and agri-processing exports from 2014 to 2024, the export of FBT products showed significant growth between 2014 and 2024. However, this growth was accompanied by a substantial increase in the import of these products, leading to a modest and relatively flat trade balance in the sector. Notably, the period from 2016 to 2019 saw a continued decline in the value of FBT exports, which raised concerns about the sector's performance. However, from 2023 to 2024, the sector experienced a relatively constant positive turn, with export values recording R33.1 billion in 2024. This constant value shows a recovery and resilience in the FBT export market, supported by factors such as increased global demand for processed food and beverages, as well as the WC's established reputation for high-quality products, especially in sectors like wine, fruit, and processed foods. On the other hand, imports of FBT products saw a relative slight decline of -1% in 2024, still reflecting a continued demand for products that are either not produced locally or require specialized ingredients and processing. Despite the

slight decline in imports, the trade balance for the FBT sector has remained relatively flat, as the growth in exports has largely offset the increase in imports, maintaining the sector's overall stability and resilience. This mixed performance highlights both the opportunities and challenges facing the FBT sector in the WC, with growing export values signalling potential for export expansion, while the slight decline of imports suggests the need for further development of local production and processing capabilities, attraction of investment, and value-added processing within the sector.



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Trade Balance	6,3	6,2	7,8	4,8	3,9	2,0	6,6	6,4	5,6	4,2	2,6
Exports	21,9	23,5	26,9	25,5	26,4	25,4	28,3	30,0	33,2	33,4	33,1
Imports	15,6	17,2	19,1	20,7	22,5	23,4	21,7	23,6	27,5	29,2	30,5

Figure 5.2:WC Food, Beverage & Tobacco (FBT) Trade, 2014-2024
Source:(Quantec, 2024a)

Figure 5.3, illustrating the WC's share in national agricultural trade from 2014 to 2024, highlights the province's significant role in both agricultural exports and imports. The WC's share of national agricultural exports increased by 4%, from 50% in 2023 to 54% in 2024. This increase is slightly higher than the 10-year average of 53% (from 2014 to 2024), and it represents a substantial contribution to the Nation's agricultural exports. The WC continues to account for more than half of all agricultural exports from the country, reflecting its dominance in key agricultural sectors such as horticulture (i.e. fruit, wine) and other processed products.

On the import side, the province's share in national agricultural imports increased by 6%, rising from 19% in 2023 to 25% in 2024. This increase signals a growing demand for agricultural imports in the WC, possibly due to factors such as changing consumer preferences, gaps in local production, market diversification, and increased demand for specific agricultural inputs and products not locally available. These shifts, in export and import shares indicate that the WC's agricultural sector remains a central player in the national agricultural trade, maintaining its pivotal role as both an exporter and importer. The province's overall contribution to South Africa's agricultural trade remains significant, highlighting its ongoing competitiveness and critical role in the country's agricultural economy.

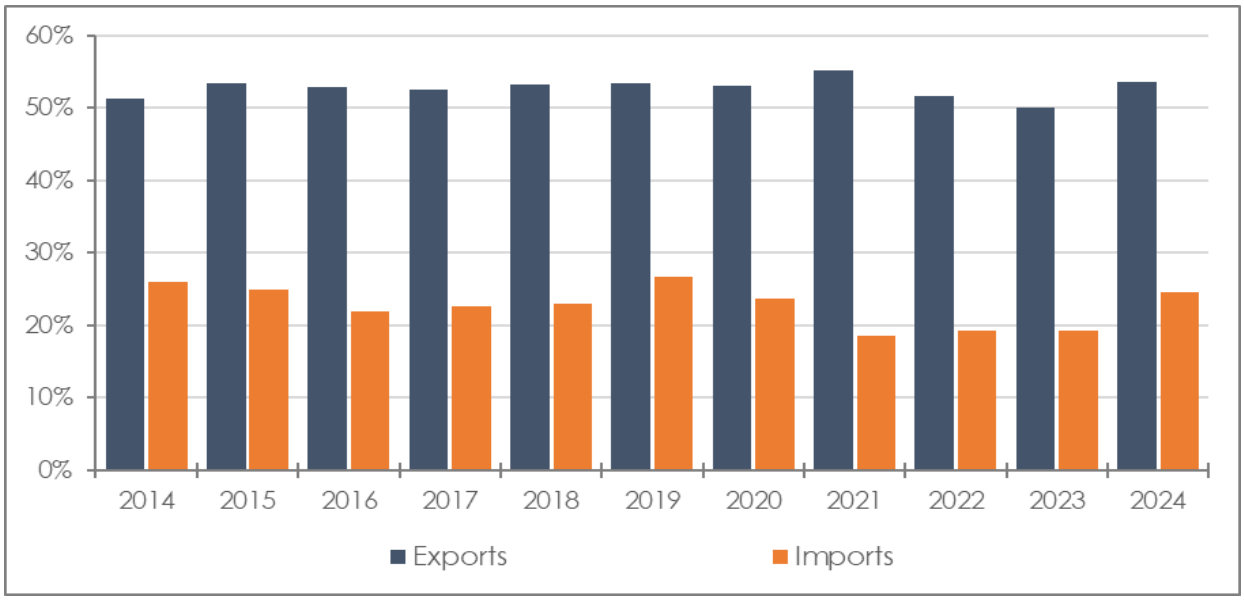


Figure 5.3:WC share in National Agricultural Trade, 2014-2024
Source: (Quantec, 2024a)

Figure 5.4 provides a graphical representation of the annual import and export flows for the FBT segment in the WC. In 2024, the province's share of national FBT exports stood at 27%, which marks a 3% decline from the previous year. This decline is part of a longer-term trend, as the WC's share in national FBT exports has been gradually declining over the past decade. In 2016, the province accounted for 39% of national FBT exports, but by 2024, this had dropped to 27%.

Despite this decline, the WC continues to be a significant contributor to South Africa's FBT export sector, representing roughly a third of the country's FBT exports. This decrease in share could be attributed to several factors; including the rise of other regions' competitiveness in the sector, changes in global demand patterns and

trends, or shifts in domestic production capabilities, and investment opportunities. On the other front, imports side, the WC also accounts for approximately a third of South Africa's FBT imports, maintaining its prominent role as a key importer in this sector. This indicates that while the province's export share may have been declining, its overall engagement in the FBT trade — both in imports and exports — remains substantial, emphasizing the central role of the province in the national FBT market.

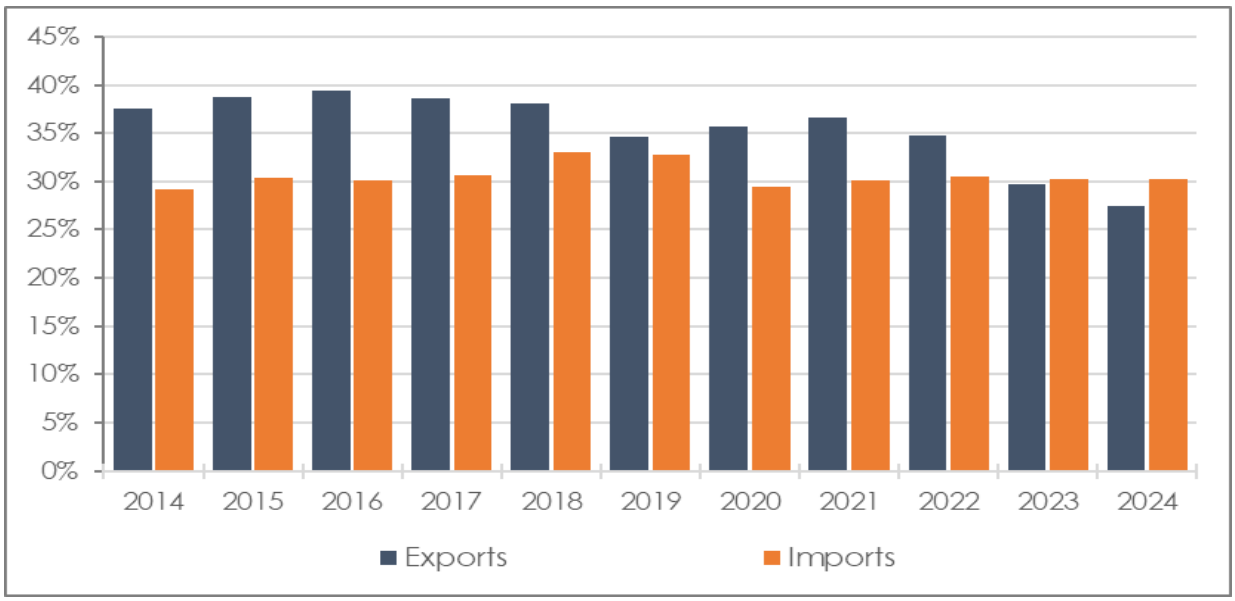


Figure 5.4: WC share in National FBT Trade, 2014-2024
Source: (Quantec, 2025a)

Figure 5.5 shows the WC agricultural exports to the top ten countries in 2023 and 2024. Most of the WC agricultural exports were destined for the Netherlands (23% or about R16.6 billion), followed by the UK (15% or about R11.3 billion), and the UAE (7% or about R5 billion) in 2024. The share of WC agricultural exports increased from the previous year for countries like the UK (+3%), Netherlands (+2%), and Canada (1%), but declined for countries like the USA (-1%), and China (-2%). From the previous year, amongst the top 10 countries, economies like the UK, Germany, and Canada observed significant growth rates of 33.5% to R11.3 million, 26% to R1.6 billion, and 24% to R1.7 billion, respectively, in 2024. The notable increase in agricultural exports to the UK in 2024 can be attributed to fresh grapes at R2.9 million in 2024. Similarly, the rise in exports to Germany can be linked to wine of fresh grapes at R457 million in the same year. In the past 5 years, there was a notable increase in exports to the Netherlands (from R10.2 million in 2020 to R16.6 million in 2024), driven by raspberries at R2.7 million (from a small base) in 2024. There was also a sharp rise in exports to the UAE which was due to frozen fruit and nuts at R3.4 million in 2024. Exports to Australia were primarily

mineral and aerated waters at R860 thousand in 2024, and exports to Botswana were mainly frozen fowls (*gallus domesticus*) at R25.7 million in the same period.

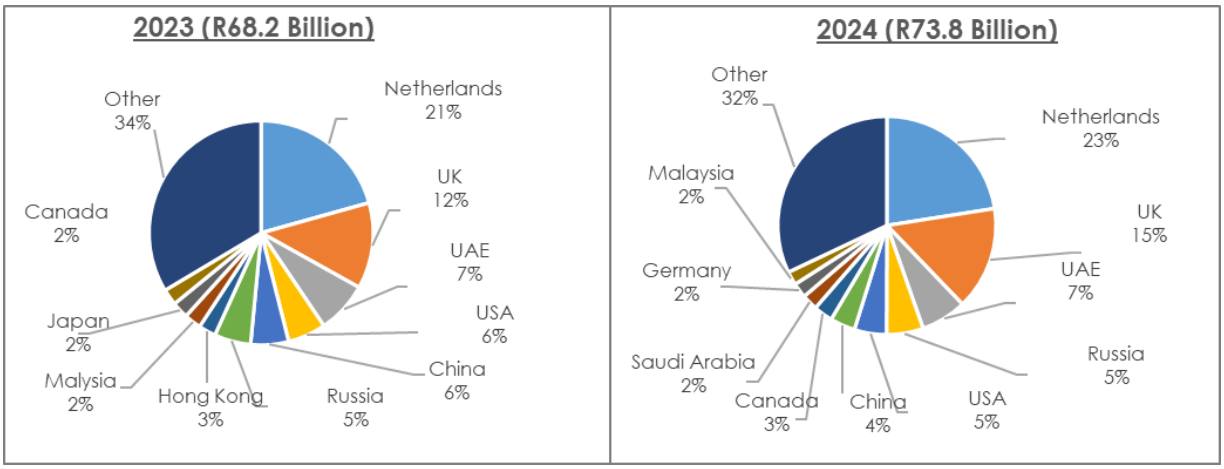


Figure 5.5: WC agricultural export destinations – countries, 2023 vs 2024
Source: (Quantec, 2024)

Figure 5.6 illustrates the trends in WC agricultural exports by region from 2014 to 2024. A majority of WC agricultural exports were directed to Europe, accounting for 53% (or R39 billion) and Asia at 30% (or R22 billion) in 2024. The main exports to Europe were horticultural products, including fresh grapes at R9.9 billion, mandarins at R4.8 billion, and apples at R4.2 billion in 2024. Whereas WC agricultural exports to Asia were led by apples (R4.3 billion), followed by oranges at R3.6 billion, and mandarins at R2.5 billion in the same year. The share of WC agricultural exports to the Americas increased from 5% in 2014 to 8% in 2024, while the share to Africa dropped from 12% to 9% in the same period. The agricultural exports to Africa mainly consisted of apples at R2.5 billion, mixtures of juices valued at R987 million, and wine in containers holding 2 litres or less. Africa had an annual growth rate of 12% in 2024 (R6.9 billion) from R5.4 billion in 2023. The WC agricultural exports to the Americas had a significant growth of 17% from 2014 (R1.2 billion) to about R5.8 billion in 2024, the highest growth rate over the observed period. The main agricultural exports to the Americas were mandarins at R1.4 billion and oranges at R1.3 billion in 2023.

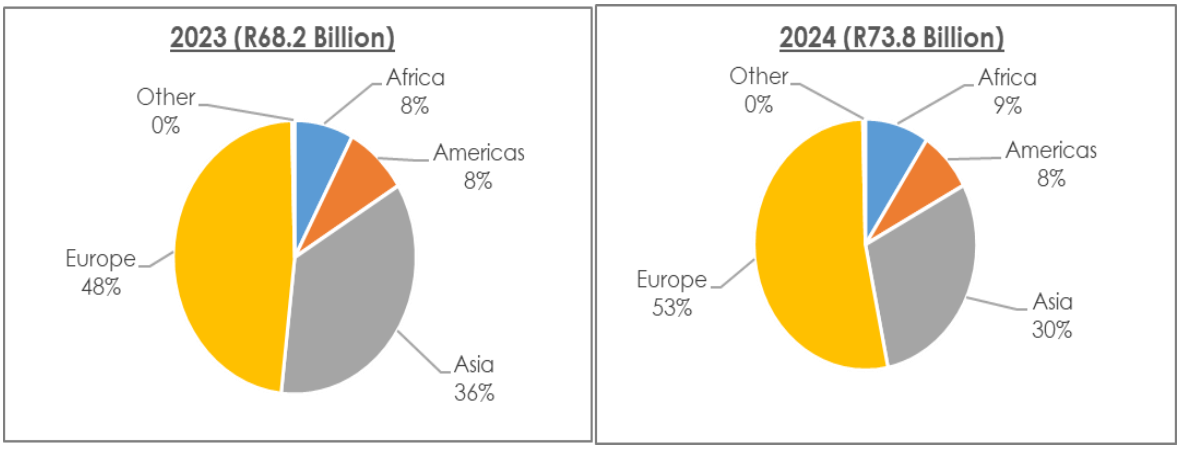


Figure 5.6:WC agricultural export destinations – regions, 2014 vs 2024
Source: (Quantec, 2024)

Error! Reference source not found. indicates the WC agricultural imports from the top ten countries in 2023 and 2024. Most of the WC agricultural imports were from Argentina (11% or R987 million), Namibia (8% or R733 million) and Russia Federation (8% or R668 million) in 2024. The share of WC agricultural imports increased from the previous year for countries like Brazil (4%) but declined for countries such as the Lithuania (-9%), the United States (-1%), and Namibia (-2%). The agricultural imports from Argentina were mainly driven by maize (excl. seed for sowing) at R903 million, frozen shrimps and prawns at R123.6 million, and frozen bovine offal (excl. tongues and livers) valued R72.5 million in 2024. Notably, a significant 5-year growth rate (2019 to 2024) of 1087% to R9.4 million, 988% to R15.3 million, and 910% to R4.4 million was observed for countries like, Nigeria, Swaziland, and Egypt, respectively. Agricultural imports from Nigeria were primarily driven by sesamum seeds, which reached R13.7 million (from a small base) in 2024. The key agricultural import from Swaziland was products containing nicotine (excluding tobacco), valued at R360 million in the same year (2024).

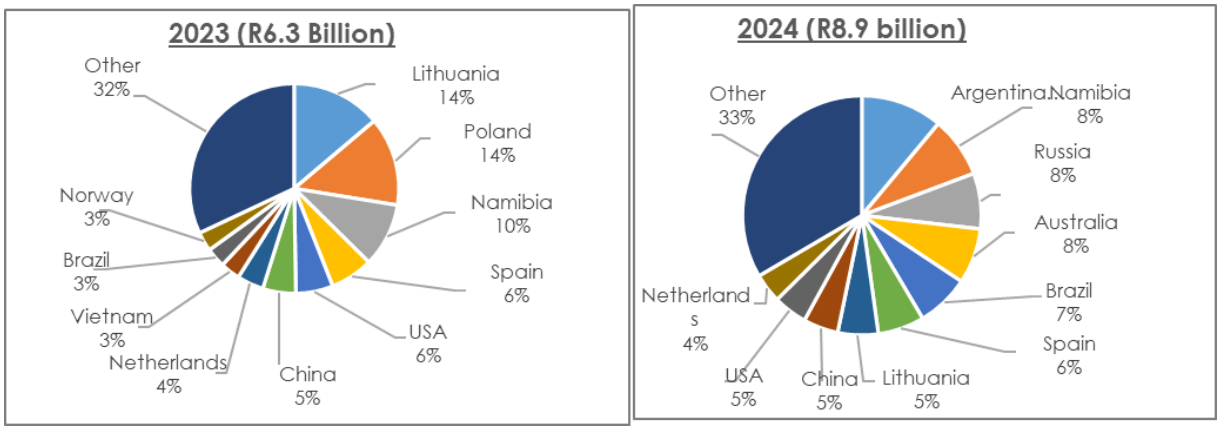


Figure 5.7: WC agricultural import destinations – countries, 2023 vs 2024
Source: (Quantec, 2024)

Figure 5.8 highlights the trends in WC agricultural imports by region from 2014 to 2024. A majority of WC agricultural imports are from Europe at 31% (or R2.7billion), followed by the Americas at 29% (or R2.5 billion), Africa at 18% (or R1.5 billion), and Asia at 13% (or R1.2 billion). The share of WC agricultural imports from Europe declined from 29% in 2014 to 31% in 2024, while the share from the Americas increased from 18% in 2014 to 29% in 2024. The WC Agricultural imports from Europe had a significant growth of 20% in 2024(R2.7 billion), increasing from R2.2 billion in 2014. The agricultural imports from Europe mainly consisted of ammonium fertiliser valued at R2.9 billion, spirits obtained from distilling wine grapes at R2.0 billion, waters (mineral and aerated) valued R1.9 billion, and whiskies at R1.4 billion in 2024. This growth was followed by America's at 12% to about R2.5 billion in 2024, from R816 million in 2024. The agricultural imports from the Americas and Africa mainly consisted of maize (excluding seed for sowing) at R1.3 billion, and sardines, sardinella, or sprats at R422 million in 2024, respectively.

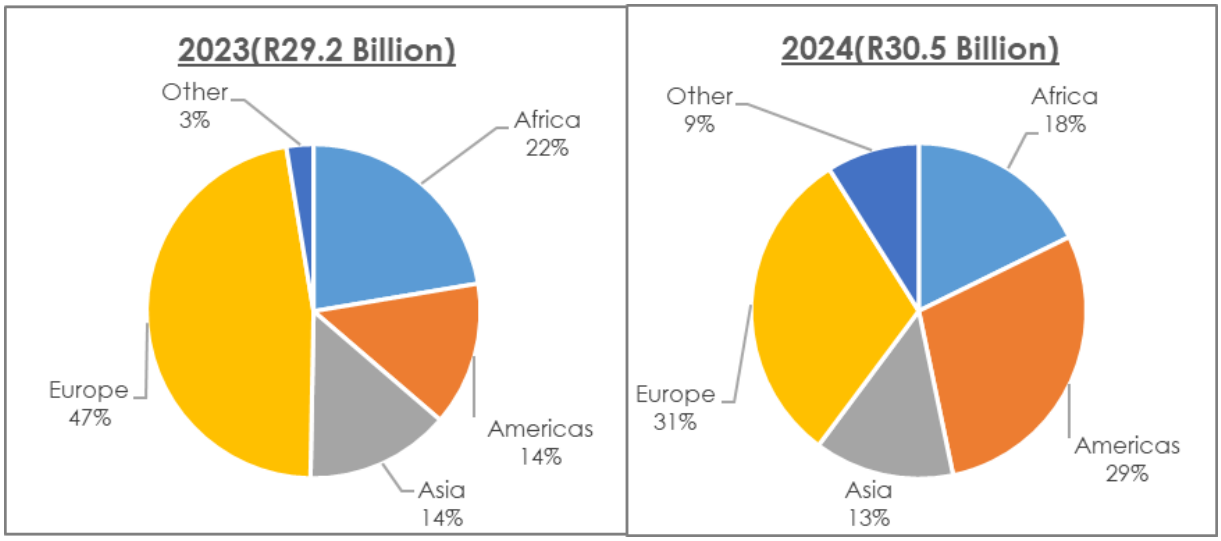


Figure 5.8: WC agricultural import destinations – regions, 2014-2024
Source: (Quantec, 2024)

Figure 5.9:WC top FBT export destinations - countries, 2023 vs 2024shows the WC food, beverages and tobacco (FBT) exports to the top ten countries in 2023 and 2024. Most of the WC FBT exports were destined to the UK (10% or R3.5 billion), Namibia (9% or R2.8 billion), and the United States (8% or R2.6 billion) in 2024. The FBT exports to the UK mainly consisted of fresh grapes valued at R2.9 billion, followed by lemons at R1.8 billion, and apples at R1.5 billion in 2024. While Namibia and the United States of America mainly imported fruit cigarettes containing tobacco, wine from fresh grapes in containers of 2 litres or less, oranges, and mandarins. The share of WC FBT exports increased from the previous year for countries like the USA (+1%), Netherlands (+1%) and Italy (+1%). Similarly, countries like Afghanistan, Guatemala, Lithuania and Morocco observed significant annual growth rates of 23949% to R56 million, 12048% to R45.5 million, 142% to R13.9 million, and 928% to R563 thousand, respectively, in 2024. The FBT exports to Afghanistan were primarily nuts and other seeds including mixtures (prepared or preserved) at R56 million. For Lithuania, the main export was dates fruit, wine of grapes in containers of 2 litres or less, and lemons totalling at R39 million in 2024. The exports to Morocco mainly consisted of mineral or chemical fertilizers containing two or three of the fertilising elements (NPK) at R14.7 million, while fruits stones and kernels and other vegetable products accounted for R5 million in exports to Morocco in the same year.

In the past ten years, there was also a notable increase in FBT exports to Georgia in 2024, driven by wine in container holding of 2 litres or less l at R1.2 million. The 10-year export growth to Afghanistan was primarily fuelled by nuts and other seeds at R56.6 million, and to the Colombia for wine in container holding of 2 litres or less, which rose to R39 million in 2024 from R31.7 million in 2023. Similarly, export growth in Kazakhstan was driven by peaches and nectarines at R7.5 million in 2024 (up from R6.2million in 2023).

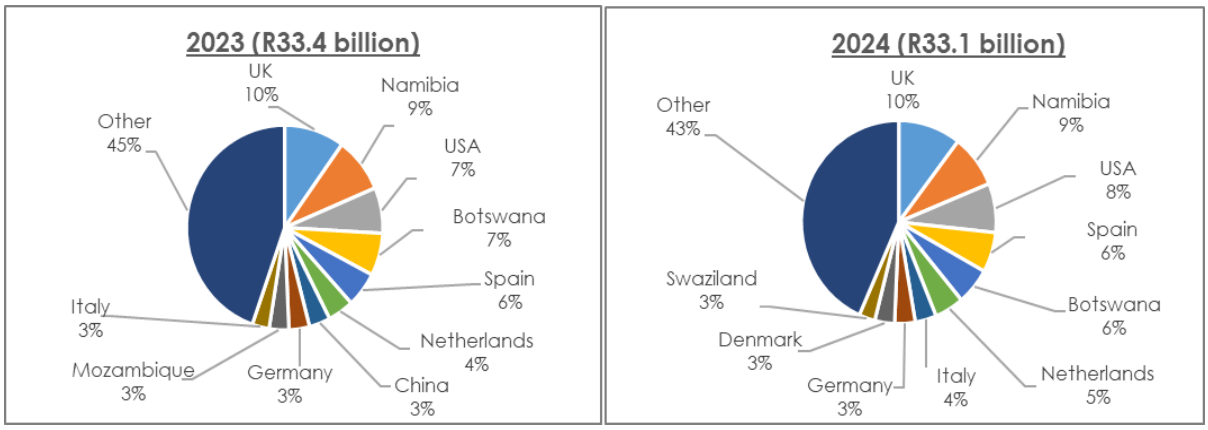


Figure 5.9:WC top FBT export destinations - countries, 2023 vs 2024
Source: (Quantec, 2024)

Figure 5.10 illustrates the trends in the WC FBT exports by regions between 2014 to 2024. WC FBT export products were destined for Europe at 43% (R14.3 billion) in 2024, followed by Africa at 33% (R10.8 billion) in the same year. The WC FBT exports to Europe increased by 8.6% over the 10 years, from R8.7 billion in 2014 to R14.3 billion in 2024. Moreover, the share of the WC FBT export to Europe increased by from 40% in 2023 to 43% in 2024.The agri-processing products (FBT) directed to the European market included fresh grapes (R9.9 billion), mandarins at R4.8 billion, oranges at R4.2 billion, and wine in container holding of 2 litres or less at R4.0 billion in 2024. All these products are horticultural in nature and a predominantly produced in the Western Cape region. Whereas the FBT exports to Africa declined from 36% in 2023 to 33% in 2024. The WC FTB exports to Africa were led by apples at R2.5 billion, followed by mixtures of juices valued at R987 million, wine in containers holding 2 litres or less at R727 billion, and cigarettes containing tobacco valued at R683 million in 2024. The WC FBT exports to Asia significantly experienced an annual growth rate of 8.3% over the past 10 years, from 2014(R2.9 billion) to R3.6 billion in 2024. The main WC agri-processing (FBT) exports

to Asia were apples at R4.3 billion, followed by oranges valued at R3.6 billion, mandarins at R2.5 billion, and pears at R1.7 billion in 2024.

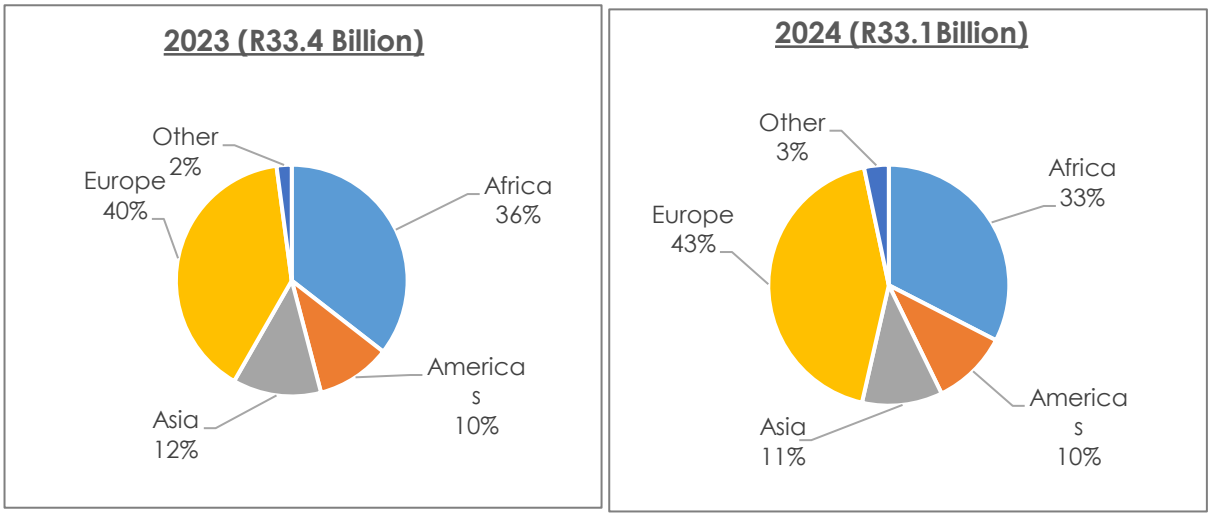


Figure 5.10: WC Top FBT Export Destinations-Regions, 2023 vs 2024
Source: (Quantec, 2024)

Figure 5.11: WC FBT imports origins - countries, 2023 vs 2024shows the proportion of WC FBT imports to the top ten countries in 2023 and 2024. Most of the WC FBT imports were from Thailand (13% or R4.1 billion), followed by France (10% or R3.2 billion) and China (9% or R2.6 billion) in 2024. The share of WC FBT imports increased from the previous year for countries like Thailand (+1%), and France (1%) but declined for the Netherlands (-1%). The FBT imports from Thailand mainly consisted of semi-milled or wholly milled rice at R2.3 billion, and sardines, sardinella and brisling or sprats at R824 million in 2024. Notably, a significant annual growth rate of 4000% to R25 million, 3655% to R44 million, 4508% to R8 thousand (from a small base, R283), and 1335% to R218 thousand was observed for countries like Madagascar, Jordan, Romania, and Cameroon, respectively, from the previous year. The FBT imports from Madagascar were mainly frozen fruit and nuts at R24.9 million. From Jordan, the primary imports were driven by the preparation of sauces and prepared sauces at R8 thousand in 2024. Cameroon's main FBT export to the WC was crude oil at R27 thousand. From Romania, the main imports included crude oil at R286 million, bread, pastry, cakes, biscuits and other bakers' wares at R62 million, and lastly, products containing tobacco valued at R40.1 million in 2024.

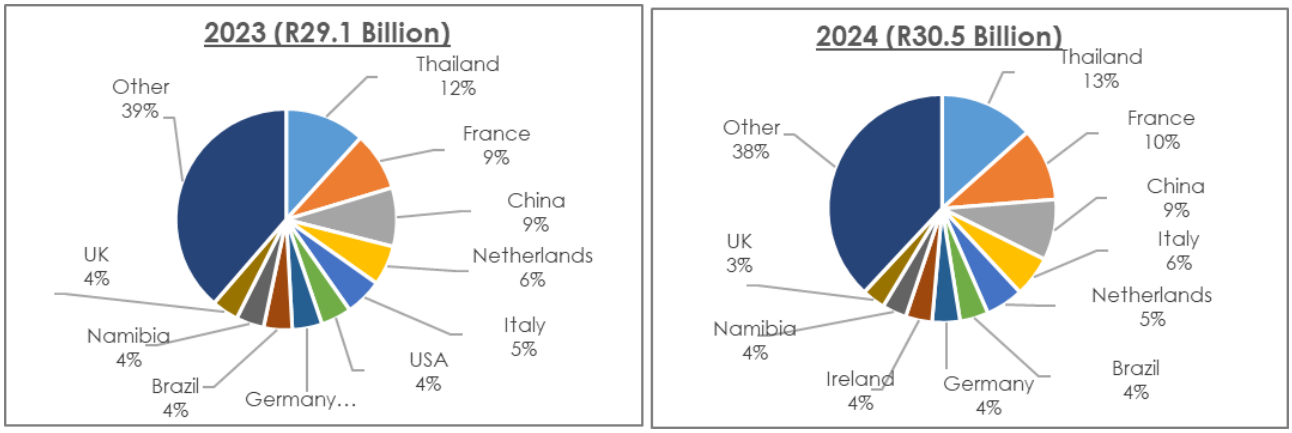


Figure 5.11: WC FBT imports origins - countries, 2023 vs 2024
Source: (Quantec, 2024)

Figure 5.12 highlights the WC FBT imports by region between 2014 and 2024(ten-year period). The WC FBT imports were from Europe at 48% (or R14.6 billion), followed by Asia at 32% (or R9.9 billion), the Americas at 10%(R3.1 billion), and Africa at 8% (or R2.4 billion). The WC FBT imports from Europe increased annually by 8.6% from R6.5 billion in 2014 to R14.6 billion in 2024, while recently, the WC FBT imports share from Europe increased from 46% in 2023 to 48% in 2024. The FBT imports from Europe mainly consisted of ammonium (fertiliser) valued at R2.9 billion, spirits from distilled grape wine valued at R2.02 billion, waters (including mineral waters) at R1.9 billion, and whiskies at R1.4 billion in 2024. Whereas the FBT imports from Asia increased annually by 8.2% from R4.4 billion in 2014 to R9.8 billion in 2024, this import growth was led by semi-milled rice (R2.6 billion), followed by sardines (sardinella & brisling) at R1.2 billion, and products containing nicotine at R1.1 billion. The share of WC FTB imports from Asia increased from 30% in 2023 to 32% in 2024. The share of WC FTB imports from Africa declined from 10% in 2023 to 8% in 2024, a decline of -0.4% over the past 10 years, the only decline when compared to other regions. The WC FBT imports from Africa consisted of sardines (sardina pilchardus, sardinops) at R422 million, products containing nicotine valued at R360 million, and hake (merluccius spp) at R347 million in 2024. The WC FBT imports from the Americas had a 10-year annual growth of 5.1%, increasing from R1.9 billion in 2014 to R3.1 billion in 2024, the lowest annual growth rate since 2014, compared to other continents. Major agri-processing products from the Americas region to WC included frozen fowls (not cut in pieces) at R2.6 billion, maize (excl. seed) valued at R1.9 billion, frozen cuts and edible offal of fowls at R1.6 billion, coffee (excl. roasted and decaffeinated) at R1.1 billion, and oilcake and other solid residues at R1.0 billion in 2024.

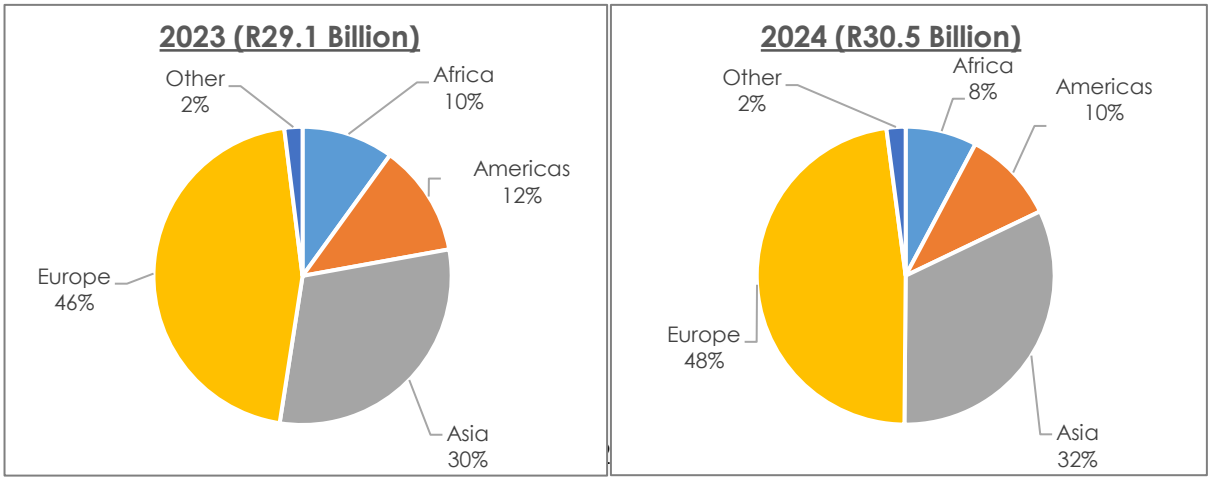


Figure 5.12: WC agricultural import destinations- regions, 2014 vs 2024
Source: (*Quantec, 2025*)

The focus of this section is on the value of exports at a highly disaggregated HS6-digit level for agricultural and agri-processing products. This allows for more precise identification of specific agri-processing products that may fall under other manufacturing sub-sectors, such as textiles and furniture, which were previously unidentifiable at the aggregate product level. The scope includes products from agriculture, forestry, fisheries, and agri-processing, specifically under the Harmonised Standard codes (HS): HS01-24; HS41; and HS50-53 (Patridge & Morokong, 2019). Thus, the term "agricultural" in this section will refer to all agricultural and agri-processing products, including forestry and fisheries. Table 5.1 illustrates the major WC (WC) agricultural export product values for 2024, their share of total agricultural exports, and their growth rates over the past year.

In 2024, fresh grapes led the top 20 list, accounting for 11.4% (R12.5 billion) of the total agricultural export value and showing a 37.4% annual growth between 2023 and 2024 marketing years. Apples followed, contributing 8.9% of the total WC agricultural and Agri-processing exports in 2024, and oranges ranked third (8.4%) valued at R9.2 billion in the same year. Mandarins and wine (under 2 litres) were also among the top agricultural export products by value in 2024. The data also highlights the significant annual growth of horticultural exports, particularly in vegetable seeds (83.6%), peaches and nectarines (64.2%), fresh grapes (37.4%), and the bark of African cherry (616%), demonstrating the sector's continued strength and expansion in the global market.

Table 5.1: Biggest WC agricultural and agri-processing exports by value

Rank	HS6 Code	Product Name	Export Value(R): 2024	Share (%) 2024	Growth(%) 2023 - 2024
1	080610	Fresh grapes	R12 550 356 726	11,41%	37,43%
2	080810	Apples	R9 746 483 439	8,86%	18,08%
3	080510	Oranges	R9 211 179 437	8,37%	-7,02%
4	080521	Mandarins	R8 813 226 839	8,01%	2,92%
5	220421	Wine <=2l	R6 392 495 980	5,81%	-7,81%
6	080550	Lemons	R4 217 852 271	3,83%	24,07%
7	080830	Pears	R4 217 852 271	3,83%	24,29%
8	081040	Cranberries, bilberries	R2 542 781 873	2,31%	-7,89%
9	030474	Hake	R2 495 208 684	2,27%	10,17%
10	220429	Wine Incl. fortified wines >10 l	R2 418 459 082	2,20%	7,15%
11	080940	Plums and Sloes	R1 846 499 255	1,68%	12,28%
12	230120	Flours, meals & Pallets of fish	R1 580 941 384	1,44%	0,16%
13	120991	Vegetable Seeds	R1 392 693 946	1,27%	83,63%
14	080540	Grapefruit	R1 374 585 385	1,25%	-5,93%
15	080620	Maize Seed	R1 152 483 274	1,05%	73,37%
16	200990	Dried	R1 104 802 544	1,00%	19,93%
17	080930	Mixtures of fruit Juices	R1 000 649 892	0,91%	8,85%
18	080440	Peaches & Nectarines	R997 029 739	0,91%	64,20%
19	081340	Avocados	R884 836 664	0,80%	24,64%
20	121160	Bark of African cherry	R867 297 871	0,79%	616,55%
Other agricultural exports			R35 226 350 557	32,01%	-6%

Source: (Quantec, 2025a)

Table 5.2 highlights the fastest-growing agricultural export products from the WC (WC) over the past ten years, ranked by their growth rate. The products are listed along with their share of total WC agricultural exports for 2024. The top three products with the highest growth rates over the past decade were pistachios nuts in shell (245%), followed by sheep carcases (excl. lambs), and true hemp (raw or retted), crude oil,

and maize corn in 2024.Sheep carcases (excl. Lambs) had a growth rate of 182%. This product also saw considerable growth, indicating a rise in international demand for sheep carcases. True hemp (raw or retted) experienced an impressive growth rate of 137%, reflecting a significant increase in demand and market expansion of this product.

Table 5.2: Fastest growing WC agricultural and agri-processing exports, 2014-2024

Rank	HS6 Code	Product Description	Export Value(R) 2024	Share (%) 2024	10yr Annual Growth(%)
1	530210	Pistachios, in shell	R5 878 141	0,01%	244,45%
2	151511	Sheep Carcases (excl. lambs)	R3 228 394	0,00%	182,42%
3	230210	True hemp, processed	R61 132 054	0,06%	137,05%
4	410229	Low erucic acid or colza seeds	R20 073 545	0,02%	132,85%
5	030252	Carcasses of bovine animals	R140 575	0,00%	117,26%
6	511290	Carded wool yarn	R7 918 937	0,01%	103,90%
7	130231	Other animal fats & oils	R62 423	0,00%	103,20%
8	120242	Woven fabrics containing >=85% wool	R1 405 535	0,00%	101,59%
9	030442	Groundnuts	R1 029 700	0,00%	101,31%
10	081210	Leather further prepared	R18 817 223	0,02%	100,17%
11	520512	Grain splits leather	R78 089	0,00%	98,55%
12	030462	Clams, cockles and ark shells	R458 926	0,00%	98,14%
13	511000	Single cotton yarn	R1 099 560	0,00%	94,60%
14	020421	Poppy Straw	R172 317 054	0,16%	91,68%
15	100821	Woven fabrics <85% combed	R524 429	0,00%	91,16%
16	151529	Roasted malt	R12 954 139	0,01%	89,22%
17	151499	High erucic acid rape	R15 168 211	0,01%	87,07%
18	530290	Maize seed for sowing	R1 998 317	0,00%	80,51%
19	230230	Hides & Skin of bovine, incl. Buffalo	R2 718 808	0,00%	80,15%
20	310250	Yarn containing >=85% wool	R986 875	0,00%	78,18%
Other agricultural exports		Other Agricultural Products	R109 706 076 178	99,70 %	

****Based on selection of HS codes (1-24; 41; 50-53)*

Source: (Quantec, 2025a)

Table 5.3 shows the biggest agricultural imports to the WC (WC) in 2024, ranked by import value and their corresponding annual growth rates. The leading product was ammonium (AND) Fertiliser, accounting for 6% of total agricultural imports, reflecting its significant demand in food production to achieve food security, domestic consumption, and supply the export market. Semi-milled or wholly milled rice follows with a 5% share, highlighting the ongoing demand for rice for local consumption and food security. Spirits from distilling wine grapes also contribute 4% to the total imports, serving as a crucial alcoholic beverage for the domestic market. Wheat and meslin (excluding seed), also represent another 4% of the imports, indicating their importance for both domestic consumptions, the processing industry, and export-related activities. Water, including mineral aerated, with a share of 3.8%, is another key import to the WC, emphasising its importance for both the domestic market and export-oriented activities of the WC Province.

Table 5.4 illustrates the agricultural imports to the WC with the highest growth rates over the past ten years, regardless of the base import value. Frozen orange juice led with a remarkable growth rate of 410%, indicating a significant increase in its demand, possibly driven by agricultural needs for processed oranges. Frozen fillets of tilapia followed with a 163% growth, reflecting an expanding demand for fillets of tilapia products. Fish fillets saw a growth of 161%, suggesting a rise in its use either for sea food processing and the demand for fish products in the WC province. Preserved or prepared meat or offal of swine experienced a growth rate of 149%, highlighting the increasing import demand for protein meat products, likely due to both domestic consumption and use in food processing. These prominent growth rates suggest a shift in the types of agricultural products being imported into the province, with a noticeable and significant increase in speciality inputs and materials for both food, food processing, and non-food industries.

Table 5.3:Biggest WC agricultural and agri-processing imports by value, 2023-2024

Rank	HS6 Code	Product Name	Import Value(R): 2024	Share (%) 2024	Growth 2023 - 2024
1	310540	Ammonium (AND) Fertiliser	2 917 482 175	6,02%	69,04%
2	100630	Semi-milled or wholly milled rice	2 612 055 021	5,39%	7,99%
3	220820	Spirits obtained from grape wine	2 101 571 173	4,33%	31,78%
4	100199	Wheat and Meslin (excl. seed)	2 026 639 243	4,18%	16,69%
5	220210	Water Incl.mineral & aerated	1 876 110 568	3,87%	24,35%
6	240412	Products with nicotine	1 671 234 555	3,45%	48,34%
7	220830	Whiskies	1 601 912 718	3,30%	0,73%
8	030353	Frozen Sardines	1 393 416 525	2,87%	41,09%
9	100590	Maize (exc. Seed)	1 311 342 754	2,70%	>200%
10	160413	Sardines, sardinella, & brisling/ sprats	1 218 439 492	2,51%	-3,46%
11	050400	Guts, bladders & Stomachs of animals	1 166 477 826	2,41%	0,38%
12	151190	Dog and Cat food	815 254 321	1,68%	31,08%
13	240220	Cigarettes containing tobacco	815 186 515	1,68%	14,10%
15	220410	Sparkling wine of fresh grapes	712 036 524	1,47%	-3,81%
16	230910	Dog and Cat food	637 581 020	1,31%	0,47%
17	020712	Frozen fowls of Gallus domesticus	583 545 783	1,20%	39,54%
18	210690	Food Preparations n.e.s	556 548 775	1,15%	4,25%
19	151211	Crude oil	548 135 022	1,13%	36,30%
Other agricultural exports		Other Agricultural Imports	22 609 462 708	46,63%	>200%

****Based on a selection of HS codes (1-24; 41; 50-53)*

Source: (Quantec, 2025a)

Table 5.4: Fastest growing WC agricultural and agri-processing import, 2014-2024

Rank	HS6 Code	Product Description	Import Value (R) 2024	Share 2024	10yr Annual Real Growth
1	200911	Frozen Orange Juice	12 119 890	0,02%	410,92%
2	030461	Frozen fillets of tilapia	1 318 305	0,00%	163,40%
3	030539	Fish fillets	2 173 349	0,00%	161,20%
4	160249	Preserved or prepared meat & offal of swine	141 046 241	0,29%	148,90%
5	060420	Foliage, branches & parts of plants	311 560	0,00%	142,67%
6	520299	Cotton waste	6 723 071	0,01%	139,58%
7	071410	Roots & tubers of manioc (Cassava)	610 774	0,00%	134,78%
8	040899	Birds' eggs	5 829 126	0,01%	133,08%
9	520912	Woven fabrics of cotton	4 214 162	0,01%	132,99%
10	081020	Fresh raspberries, blackberries, mulberries, loganberries	368 338	0,00%	130,77%
11	530210	True hemp "Cannabis sativa L"	1 135 696	0,00%	128,24%
12	151321	Crude palm kernel & babassu oil	16 440 854	0,03%	123,19%
13	310490	Carmalita, sylvite & other crude	5 855 656	0,01%	116,40%
14	530610	Single Flax yam	6 817 316	0,01%	113,47%
15	120230	Groundnut seed, for sowing	1 554 434	0,00%	107,29%
16	150190	Poultry Fat	4 667 031	0,01%	94,55%
17	530310	Jute and other textile bast fibres	103 304	0,00%	92,48%
18	110430	Germ of cereals	40 748	0,00%	91,02%
19	070890	Leguminous vegetables	2 108 218	0,00%	81,12%
20	080262	Macadamia nuts, shelled	4 314 291	0,01%	79,34%
Other agricultural exports		Other Agricultural Imports	48 268 486 160	99,55%	-

Source: (Quantec, 2025a)

Summary points

- Despite continuous deteriorating infrastructure, the COVID-19 pandemic disruption on food value chains, fragmented markets, intensifying global geopolitical tensions, trade wars, climate change, and environmental disasters, WC agricultural exports increased significantly, from R68.2 billion in 2023 to R73.8 billion in 2024. Key export destinations included the Netherlands, the UK, and the UAE, with notable growth in exports of citrus, fresh grapes, vegetable seeds, maize seed, and bark of African cherry.
- Agricultural imports in WC increased slightly from R6.3 billion in 2023 to R8.9 billion in 2024. However, imports like ammonium fertiliser, spirits from distilling wine grapes, waters (mineral and aerated), and whiskies were major imports from Europe to WC Province, with key suppliers being Lithuania, Russia, and Spain.
- Agri-processing trade performance from 2023 to 2024 reveals that exports slightly declined from R33.4 billion to R33.1 billion. However, WC's share of national FBT exports grew, from 51% in 2014 to 54% in 2024. Key FBT exports included wine and prepared fruits, primarily directed to Europe and the Americas in 2024. FBT Imports showed a slight increase of 4.5% in 2024.
- Several WC FBT export products were destined to the European market at 43% (R14.3 billion) in 2024, followed by Africa at 33% (R10.8 billion) in the same year. The WC FBT exports to the EU market increased by 5.1% over the past ten years.
- Agri-processing imports to the WC mainly came from the EU region (R14.6 Billion), followed by Asia (R9.8 billion), and Americas (R3.1 billion) in 2024. The WC FBT imports from EU increased by 8.6% over the past 10 years.

Agricultural Employment

6

6. AGRICULTURAL EMPLOYMENT

Employment growth is a priority of the WC government. Figure 6.1 illustrates the trends and contributions of WC agricultural employment in the past decade. Seasonally adjusted data showed steady numbers in agricultural employment, with the number of employed individuals staying roughly the same with 199 387 in Q1 of 2022 to 193 000 in Q4 of 2024.

In terms of actual employment, agricultural jobs decreased by 16% from 217 000 in Q4 of 2023 to 186 000 in Q4 of 2024. The sharp drop in employment is a typical reflection of the seasonal nature of agriculture in the WC, where labour demand fluctuates based on harvesting and planting cycles. Despite these fluctuations, the share of agricultural employment as a proportion of the total provincial workforce has remained stable at 8% between 2022 and 2024. However, this is lower than the peak contribution of 9.4% observed in Q4 of 2015.

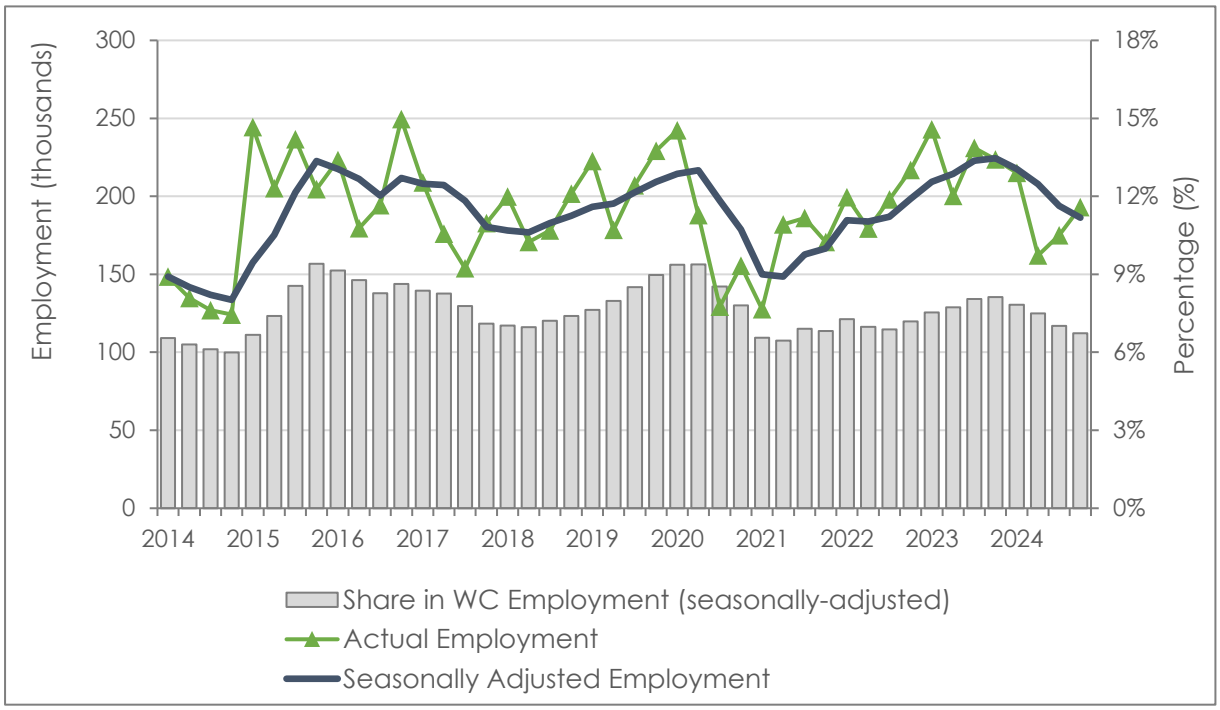


Figure 6.1: WC employment in agriculture, 2014-2024
Source: (Quantec; Stats SA, 2024)

Agri-processing employment, particularly in the food, beverages, and tobacco industries, has been experiencing a gradual decline, as shown in

Figure 6.2. In actual terms, agri-processing employment fell by 19%, from 114 000 workers in Q4 of 2022 to 92 000 in Q4 of 2024. The agri-processing sector's share of total employment in the WC has decreased from 4.4% in Q1 of 2022 to 3.6% in Q4 of 2024. These trends indicate that while primary agriculture employment remains stable, the agri-processing sector is under strain, potentially impacting value addition in the regional economy.

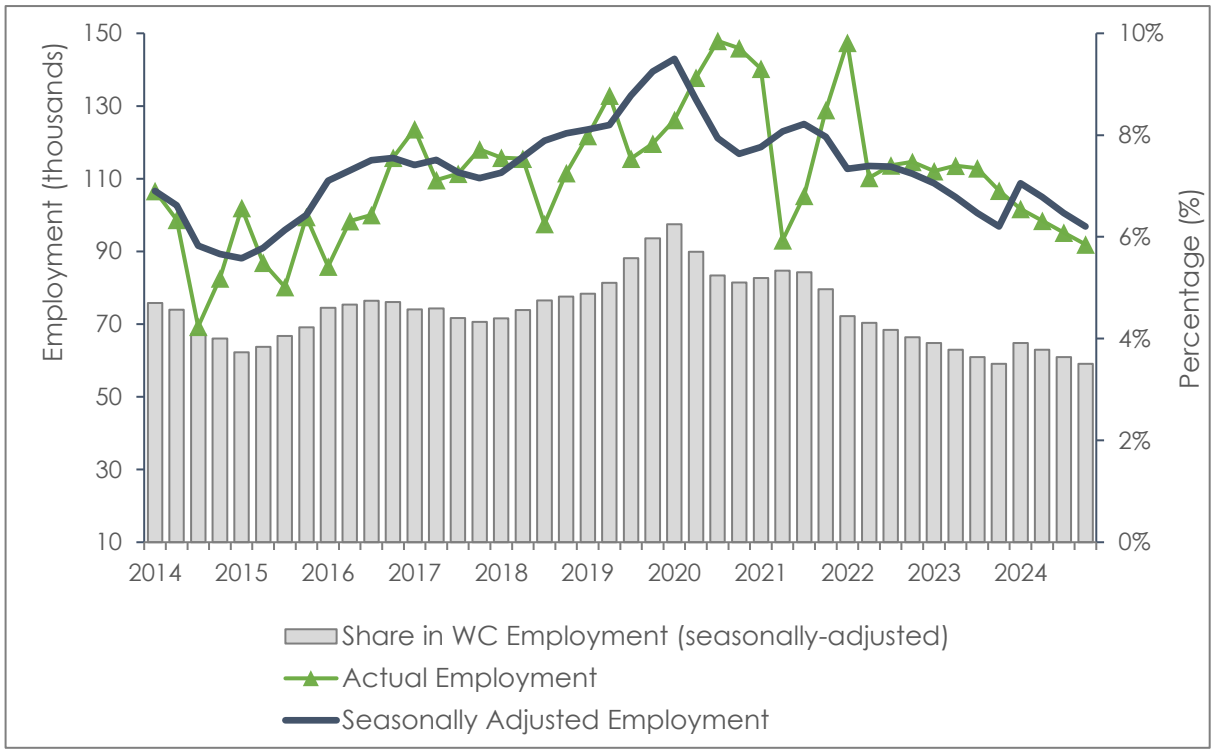


Figure 6.2: WC employment in FBT, 2014-2024
Source: (Quantec; Stats SA, 2024)

At the national level, the WC continues to play a pivotal role in both agriculture and agri-processing, contributing significantly to South Africa's overall employment in these sectors, as depicted in Figure 6.3. The WC's share of national agricultural employment saw a notable recovery after reaching its lowest point of 20% in Q2 of 2021, a direct result of COVID-19 disruptions. By Q4 of 2023, the province's share rebounded to 26%, aligning with pre-pandemic levels. This recovery reflects the resilience of the WC's agricultural sector, supported by favourable agro-climatic conditions and a strong focus on high-value crops and export markets.

In contrast, the WC's share of South Africa's agri-processing (food, beverages, and tobacco) employment has seen a gradual decline. From a peak of 40% in Q1 of 2021, the province's contribution fell to 31% in Q4 of 2024. This drop indicates that, while still a key player, the WC is facing growing competition from other regions or potential structural shifts in the agri-processing industry. The decline could be driven by factors such as market consolidation, evolving consumer preferences, or technological changes that reduce labour demand in this sector. Despite these challenges, the WC remains a significant contributor to national agricultural and agri-processing employment.

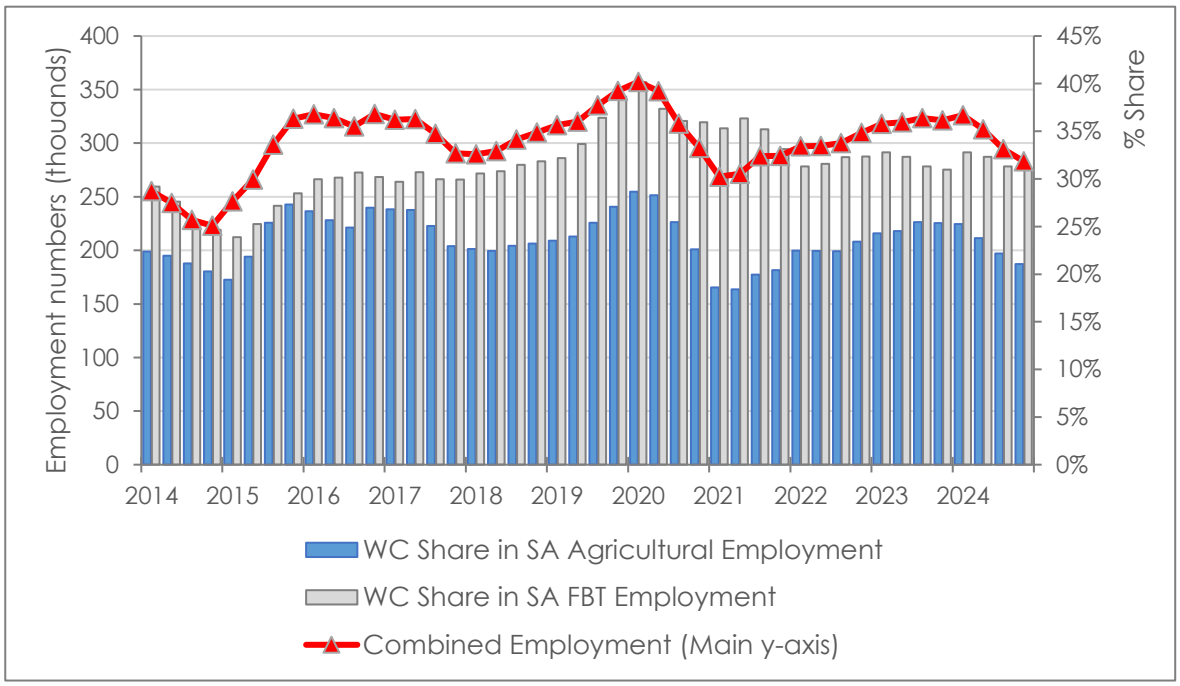


Figure 6.3: WC share in national sectoral employment (seasonally adj.), 2013-2024

Source: (Quantec; Stats SA, 2024)

Table 6.1 shows that in 2024, the proportion of black individuals, including Coloureds and Indians) employed in agriculture and agri-processing grew modestly by 0.5%, reaching 95%. This growth, however, was much lower than the significant 13.1% increase witnessed in 2022, which could have been driven by broader recovery dynamics post-COVID. The deceleration in 2023 suggests a stabilisation of employment patterns after the pandemic's disruptions. Youth employment in primary agriculture showed a worrying trend, with a decline in the relative share of young workers. In 2023, youth employment dropped by 7%, following a smaller decline of 0.5% in 2022. As a result, young people accounted for only 38% of agricultural

employment. In secondary agriculture, youth employment also decreased, though at a slower rate of 1.8% in 2023, compared to a 2.3% growth in 2022. Youth representation in agri-processing was slightly better, contributing to 44% of employment in 2023.

Employment growth in rural areas rose by 3.2%, driven largely by agri-processing, signalling a shift in labour demand toward value-added sectors. Female employment trends were mixed. While female employment in primary agriculture increased by 2.9%, it declined by 4.3% in agri-processing, reflecting gender disparities in sectoral employment trends.

Table 6.1: Demographics of WC agricultural employment, 2023vs 2024

	Black[4]	Female	Youth	Rural
Agriculture				
2023	91%	42%	39%	69%
2024	92%	56%	45%	84%
Relative Change	*1,5%*	*14,1%*	*5,4%*	*14,8%*
Food, Beverages and Tobacco				
2023	91%	38%	43%	7%
2024	86%	31%	40%	9%
Relative Change	*-4,4%*	*-6,5%*	*-3,6%*	*2,0%*
Combined				
2023	91%	41%	41%	47%
2024	90%	47%	43%	57%
Relative Change	*-0,6%*	*6,6%*	*2,2%*	*9,3%*

Source: (Quantec; Stats SA, 2024)

[4] "Black people" is a generic term which means Africans, Coloureds and Indians (BBEE No. 53 Act of 2003) (https://www.gov.za/sites/default/files/gcis_document/201409/a53-030.pdf)

Summary points

- WC agricultural employment grew steadily, rising from 148 000 in Q2 of 2021 to 198 000 in Q4 of 2024.
- Agri-processing employment declined by 7%, from 114 000 in Q4 of 2022 to 106 000 in Q4 of 2024, with its share of total employment dropping from 4.9% to 4%.

Subsistence Farming 7

7. SUBSISTENCE FARMING

The number of households engaged in non-commercial agriculture saw an increase of 15%, from 59 000 in 2023 to 68 000 in 2024, as shown in Figure 7.1. The peak of subsistence farming was observed in 2020 when 79 000 households were involved in non-commercial agriculture, driven largely by economic hardships and food security concerns during the lockdowns and economic disruptions. The decline in 2023 reflects a gradual return to pre-pandemic conditions, as economic recovery and improved access to formal markets likely reduced the need for households to rely on subsistence agriculture. This shift indicates a broader trend of households moving away from subsistence agriculture as they regain stability through other forms of livelihood or employment.

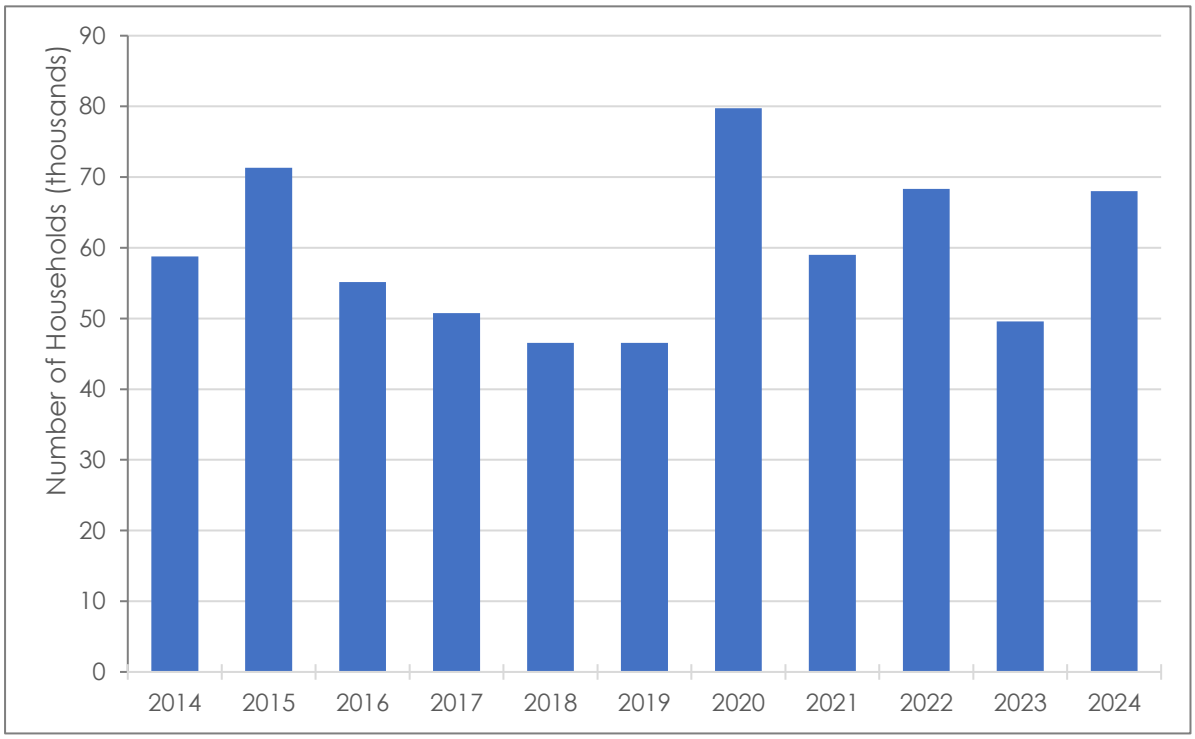


Figure 7.1: Households involved in non-commercial agriculture, 2014- 2024
Source: (Stats SA, 2024)

In 2024, most of the households engaged in subsistence farming focused on fruit and vegetable production. Approximately 41 000 households engaged in these activities, as illustrated in Figure 7.2. In contrast, approximately 6 000 households were involved in livestock farming during the same period. This distribution underscores the importance of fruit and vegetable cultivation for subsistence farmers, likely due to the relatively small land requirements and quicker returns on investment compared to

livestock farming. The COVID-19 pandemic in 2020 had a significant impact on both sectors, causing major disruptions. The economic shock and lockdowns led to a surge in subsistence farming as households turned to agriculture for food security and income supplementation. During this time, subsistence farming in fruit, vegetables, and livestock saw a sharp increase in participation as families sought to mitigate the financial strain caused by job losses and reduced access to formal markets. However, as the pandemic's effects waned and economic activity normalised, the number of households involved in these sectors declined.

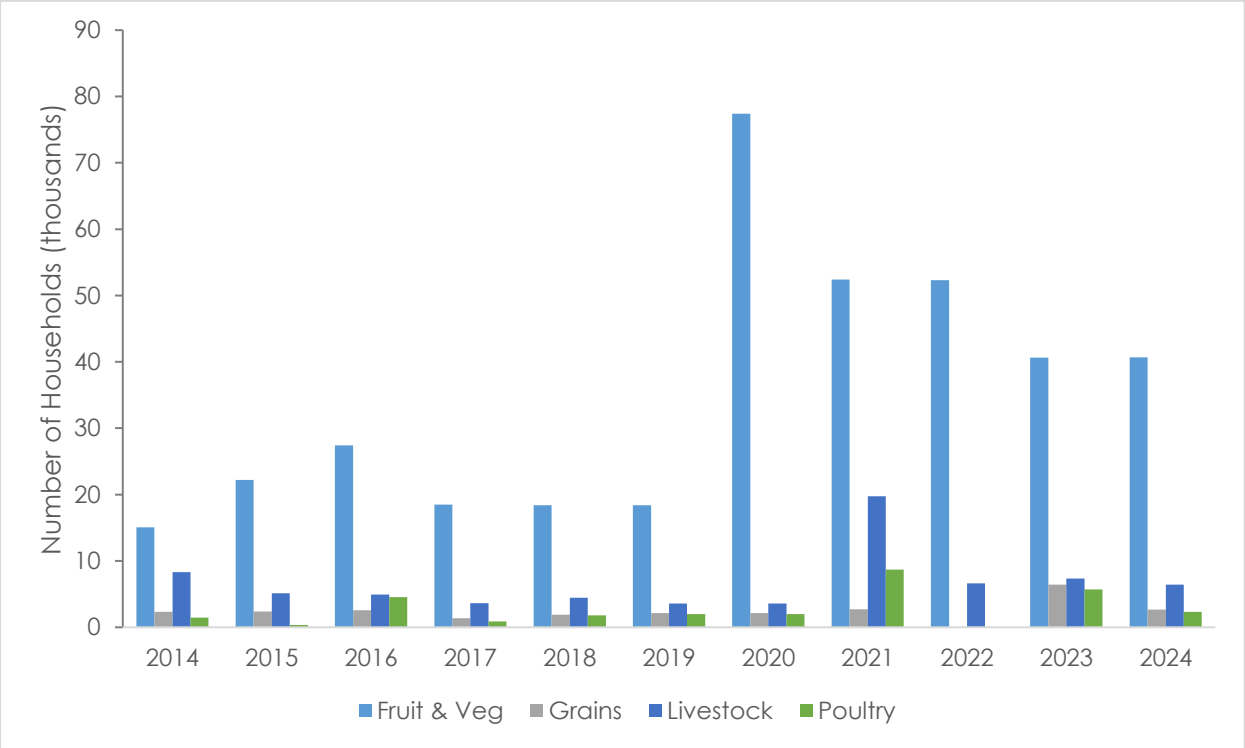


Figure 7.2: WC agricultural households by type of activity
Source: (Stats SA, 2024)

Summary points

- The number of households engaged in non-commercial agriculture saw an increase of 15%, from 59 000 in 2023 to 68 000 in 2024.
- Fruit and vegetables are still the largest agricultural activity in the WC.

Investment in Agriculture

8

8. INVESTMENT IN AGRICULTURE

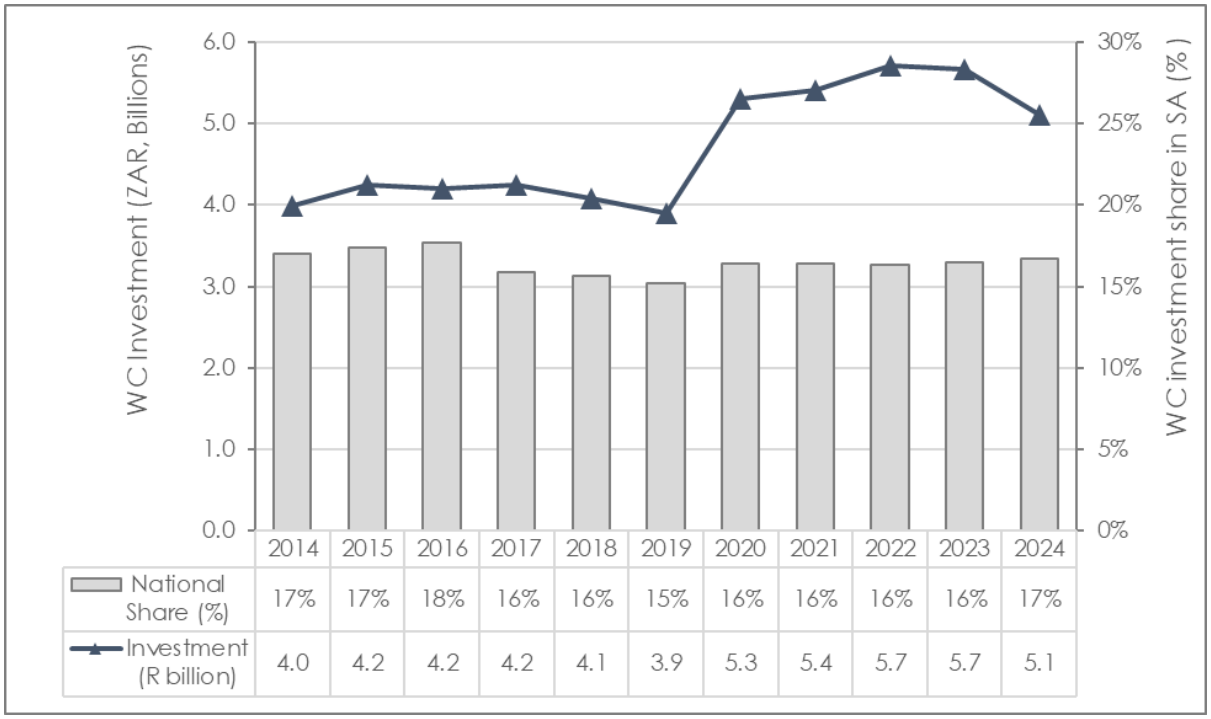
Investment in agriculture is critical for economic development. Agriculture is the backbone of food security in the country, and strategic investment can lift local food production while limiting the reliance on imports. The sector also presents enormous opportunities for the creation of employment, particularly in rural areas where unemployment is greatest, for skilled and unskilled labour along the whole value chain from planting to processing and marketing. Given South Africa's favourable climate and vast arable land, increased investment in agriculture can make the country a significant food exporter to regional and international markets and create valuable earnings from foreign exchange.

In addition, a thriving agricultural sector supports rural development in helping to reduce the blunt inequality between urban and rural areas while preserving traditional farming communities. Investments in emerging agriculture technologies, irrigation, and sustainable agriculture can also enhance productivity and climate change resilience and ensure future food security for the country's growing population. This section analyses investment in the agricultural sector using the gross fixed capital formation (GFCF) as a proxy. Figure 8.1 illustrates WC agriculture investment trends for the period 2014 - 2024, both in terms of overall investment and the province's share of South Africa's total agricultural investment. In real terms, investment in the WC agricultural sector decreased by 10%, declining from R5.66 billion in 2023 to R5.1 billion in 2024.

WC agricultural investment during this decade had an irregular trend, fluctuating relatively evenly in the range of R3.99 - 4.2 billion between 2014 - 2018, then dropping to R3.89 billion in 2019 before shooting up exponentially to R5.3 billion in 2020. The value increased in 2022 - 2023, hitting an all-time high of R5.7 billion before going down to R5.1 billion in 2024. The national contribution to WC agricultural investment is also an interesting story, holding at 16-18% between 2014 and 2019, and dropping to an all-time low of 15% in 2019. The spike in 2020 brought the WC's contribution up to 16%. In 2024, the share of national agricultural investment was steady at 17%.

Figure 8.1 indicates that 2019 was a very difficult year, during which both absolute investment as well as national share recorded their lowest points. The recovery from 2020 has been significant, with investment growing by a staggering 36% over a single

year. Investment volatility within the WC appears greater than the general national average, suggesting that the province's agricultural sector is more sensitive to economic cycles or policy changes. The recent downturn in 2024, while still above the pre-2020 pace, implies that this expansion phase is plateauing as the province's share reverts toward more typical historical rates.



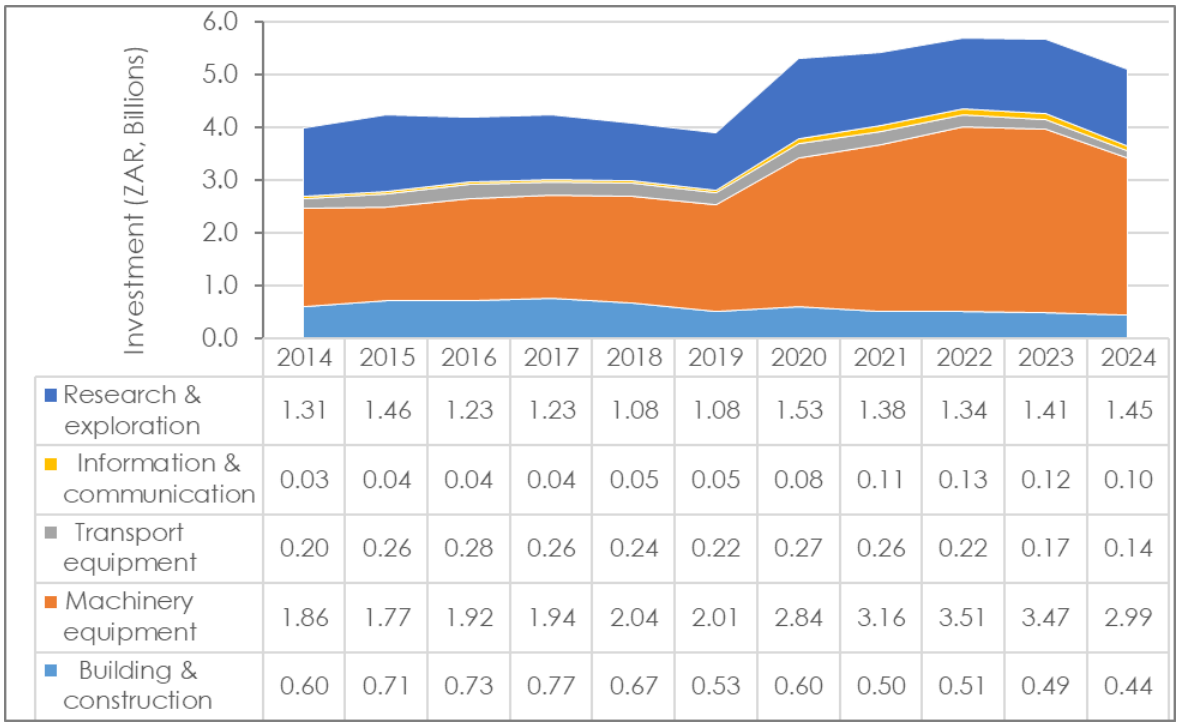
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
National Share (%)	17%	17%	18%	16%	16%	15%	16%	16%	16%	16%	17%
Investment (R billion)	4.0	4.2	4.2	4.2	4.1	3.9	5.3	5.4	5.7	5.7	5.1

Figure 8.1: Real Investment (GFCF) in the WC Agriculture, 2014-2024
Source: (Quantec, 2025a)

Figure 8.2 shows WC agricultural investment statistics from 2024-2024 and shows a few trends that justify why constant investment in agriculture is vital to the province. The Figure suggests that machinery and equipment investment has been the most crucial component of capital formation in agriculture, reaching a record above R3.5 billion in 2022 before narrowing to around R2.9 billion in 2024. This high investment in machinery and equipment is demonstrating the sector's modernization efforts, which is crucial for increasing productivity and competitiveness. However, the recent decline is alarming since it may signal reduced confidence or financial constraints in the sector.

Investment in buildings and construction has been volatile, declining sharply from R765 million in 2017 to R441 million in 2024, suggesting challenges in infrastructure

development. Research and exploration investment has remained resilient, with an average of R1.3 billion, which is essential for innovation and sustainable agricultural practices. The relatively low investment in information and communication (R126 million in 2022) is both an opportunity and a challenge, with digital farming and precision agriculture technology set to significantly boost productivity. Research and exploration are the only investment types that showed growth (3%) year-on-year.



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Research & exploration	1.31	1.46	1.23	1.23	1.08	1.08	1.53	1.38	1.34	1.41	1.45
Information & communication	0.03	0.04	0.04	0.04	0.05	0.05	0.08	0.11	0.13	0.12	0.10
Transport equipment	0.20	0.26	0.28	0.26	0.24	0.22	0.27	0.26	0.22	0.17	0.14
Machinery equipment	1.86	1.77	1.92	1.94	2.04	2.01	2.84	3.16	3.51	3.47	2.99
Building & construction	0.60	0.71	0.73	0.77	0.67	0.53	0.60	0.50	0.51	0.49	0.44

Figure 8.2: Real Investment (GFCF) in the WC by type, 2014-2024
Source: (Quantec, 2025a)

Table 8.1 shows the municipal breakdown of agricultural investment in the WC. The Cape Winelands district received the largest share (33.4%), generating over a third of the provincial agricultural output (R1.7 billion in 2024), even though Cape Winelands' relative proportion decreased by a slight amount from 36.3% to 33.4%. Suggesting that while the wine and fruit sectors continue to dominate economically, other regions are growing more rapidly. The West Coast is the second-largest contributor at 24.8% (R1.26 billion), with strong 10-year annual growth in municipalities like Matzikama (4.99%) and Saldanha Bay (5.46%), most likely due to its critical role in grain production, livestock farming and aquaculture which increasingly attracts funding opportunities for mechanization, irrigation systems and sustainability initiatives. Cape Winelands and the West Coast jointly contribute 58.2% to the province's agricultural investment,

which highlights their strategic importance to the province's agricultural economy. Interestingly, the proportion of agriculture in the City of Cape Town is up from 15.7% to 18.1%, which indicates the increasing importance of urban agriculture. However, overall agricultural production in the province declined from R5.66 billion in 2023 to R5.1 billion in 2024, which could be due to drought and or load-shedding.

Table 8.1:Geography of Agricultural Investment (GFCF), 2014-2024

	2014		2023		2024		10y Annual Growth
	Rm	Share	Rm	Share	Rm	Share	
City of Cape Town	**626**	**15,7%**	1 013	**17,9%**	**924**	**18,1%**	**3,98%**
City of Cape Town	626	15,7%	1 013	17,9%	**924**	18,1%	3,98%
West Coast	**887**	**22,2%**	1 396	**24,6%**	**1 268**	**24,8%**	**3,63%**
Matzikama	185	4,6%	332	5,9%	**302**	5,9%	4,99%
Cederberg	158	4,0%	210	3,7%	**189**	3,7%	1,81%
Bergrivier	230	5,8%	357	6,3%	**325**	6,4%	3,53%
Saldanha Bay	49	1,2%	91	1,6%	**84**	1,6%	5,46%
Swartland	265	6,7%	406	7,2%	**369**	7,2%	3,35%
Cape Winelands	**1 448**	**36,3%**	1 902	**33,6%**	**1 706**	**33,4%**	**1,65%**
Witzenberg	306	7,7%	426	7,5%	**384**	7,5%	2,27%
Drakenstein	337	8,5%	460	8,1%	**414**	8,1%	2,08%
Stellenbosch	219	5,5%	276	4,9%	**246**	4,8%	1,17%
Breede Valley	349	8,7%	443	7,8%	**396**	7,7%	1,27%
Langeberg	236	5,9%	297	5,3%	**266**	5,2%	1,20%
Overberg	**473**	**11,8%**	595	**10,5%**	**532**	**10,4%**	**1,18%**
Theewaterskloof	312	7,8%	390	6,9%	**348**	6,8%	1,12%
Overstrand	46	1,2%	60	1,1%	**54**	1,1%	1,60%
Cape Agulhas	44	1,1%	56	1,0%	**50**	1,0%	1,29%
Swellendam	71	1,8%	89	1,6%	**79**	1,5%	1,10%
Eden	**449**	**11,2%**	603	**10,6%**	**541**	**10,6%**	**1,89%**
Kannaland	55	1,4%	70	1,2%	**62**	1,2%	1,19%
Hessequa	92	2,3%	114	2,0%	**101**	2,0%	0,94%
Mossel Bay	42	1,0%	54	1,0%	**49**	1,0%	1,58%
George	136	3,4%	189	3,3%	**170**	3,3%	2,30%
Oudtshoorn	80	2,0%	108	1,9%	**97**	1,9%	2,04%
Bitou	21	0,5%	33	0,6%	**30**	0,6%	3,59%
Knysna	23	0,6%	34	0,6%	**31**	0,6%	2,95%
Central Karoo	**109**	**2,7%**	**156**	**2,8%**	**141**	**2,8%**	**2,60%**
Laingsburg	24	0,6%	34	0,6%	**31**	0,6%	2,36%
Prince Albert	24	0,6%	35	0,6%	**31**	0,6%	2,79%
Beaufort West	61	1,5%	87	1,5%	**79**	1,5%	2,62%
Western Cape	***3 992***	***100%***	***5 665***	***100%***	***5 112***	***100%***	***2,50%***

Source: (Quantec, 2025a)

Figure 8.3 illustrates the real investment in the WC's Food, Beverages and Tobacco (FBT) sector, showing a decline of 19% for 2024. This represents a significant shift, which is concerning as the province is seen as one of SA's most productive and export-oriented agricultural regions. The reduction in investment can be due to various factors, for example, the diversion of investment to other provinces or challenges like politics, for example, which is influencing investor confidence in the province. At a national level, the WC has a 21% share of total FBT sector investment in 2024. This consistent contribution underscores the province's leadership in agri-processing, supported by its vigorous agricultural foundation, skilled workforce and market access.

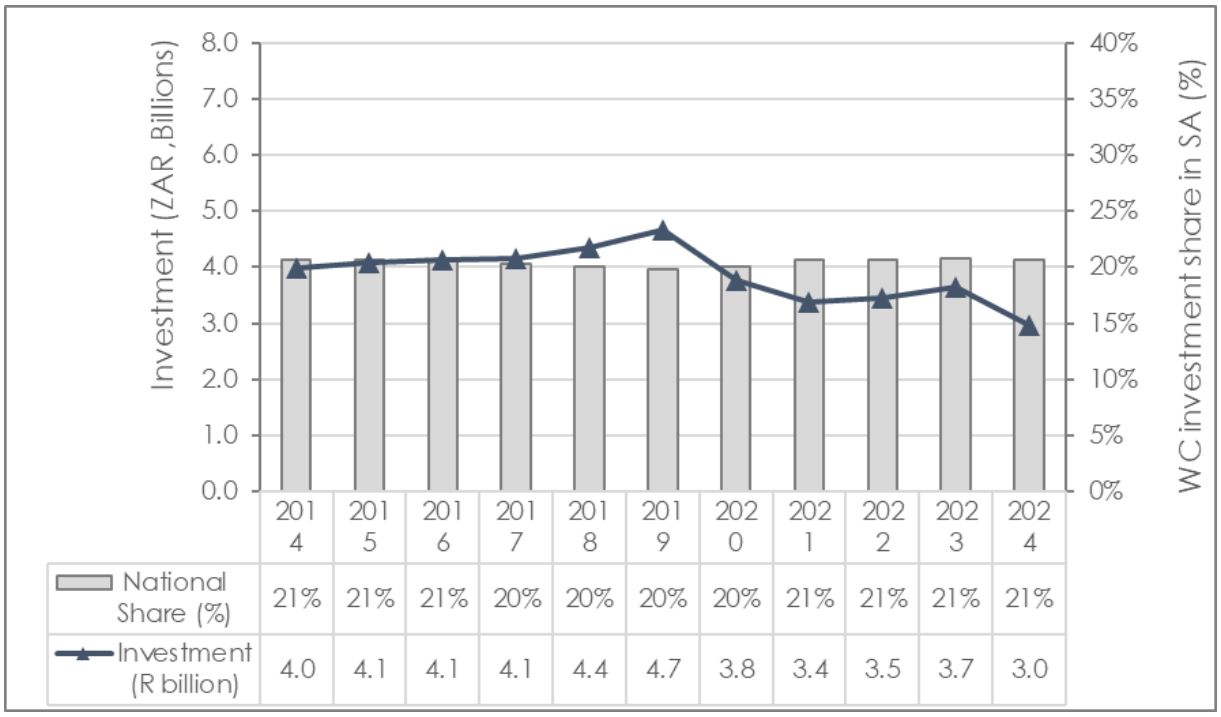
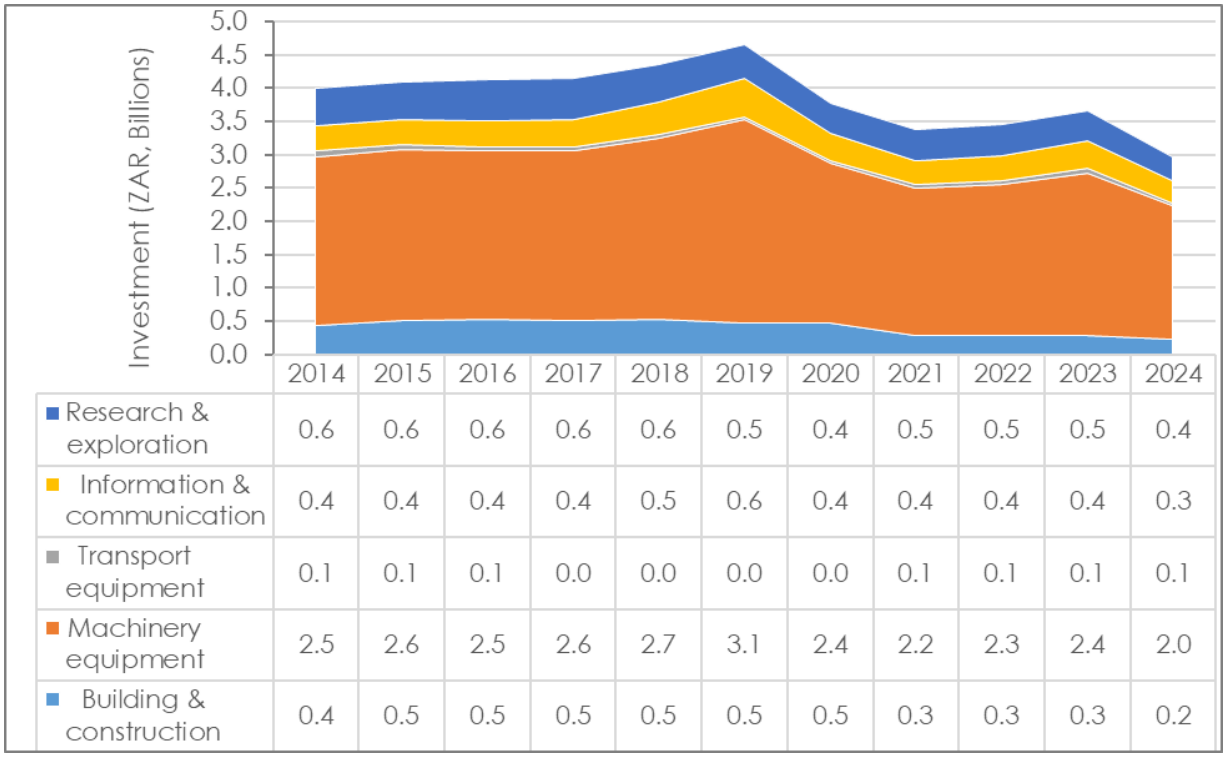


Figure 8.3: Investment (CFCF) in WC FBT and National Share, 2014-2024
Source: (Quantec, 2025a)

The decline in FBT investments for the WC can be depicted in Figure 8.4, showing all the investment categories within the FBT sector also declining. A noteworthy decline has been in machinery and equipment, which fell from R3.05 billion in 2019 to R2.0 billion in 2024. This is mostly concerning as investment in machinery and equipment is crucial for maintaining productivity and competitiveness in the agricultural space. Similarly, building and construction have halved from R471million to R222 million over the same period, indicating reduced infrastructure development that could hamper long-term agricultural capacity. Focusing on the last 5-year annual growth rate,

buildings and construction have been declining by 14%, followed by information and communication (10%), machinery and equipment by 8% and research and exploration by 7%. The only category that shows [positive long-term growth is transport equipment (4%).



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Research & exploration	0.6	0.6	0.6	0.6	0.6	0.5	0.4	0.5	0.5	0.5	0.4
Information & communication	0.4	0.4	0.4	0.4	0.5	0.6	0.4	0.4	0.4	0.4	0.3
Transport equipment	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1
Machinery equipment	2.5	2.6	2.5	2.6	2.7	3.1	2.4	2.2	2.3	2.4	2.0
Building & construction	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.3	0.3	0.3	0.2

Figure 8.4: Investment (CFCF) in WC FBT by type, 2014-2024
Source: (Quantec, 2025a)

Table 8.2 provides a detailed geographical distribution of investment in the WC's FBT sector for 2014, 2023 and 2024. The Table shows major structural shifts in the WC FBT investment patterns. Cape Winelands, also seen traditionally as the backbone of the province, has seen its investment share decline from 222.1% in 2024 to just 13.6% in 2024. The 10-year annual growth rate for Cape Winelands is also alarming, with a decline of 7.48%. This represents a loss of nearly R500 million in annual investment, with municipalities like Drakenstein (-6.31%), Stellenbosch (-6.24%), and Langeberg (-6.42%) experiencing severe decreases.

On the contrary, the City of Cape Town's share has increased from 55.3% to 60.7%, although it has seen a 10-year average annual growth of -1.99%. This increase suggests agricultural investment is directed more toward urban farming in the form of urban agriculture, agro-processing hubs, or agricultural services rather than traditional

farming. The West Coast has managed to maintain its relative contribution at about 15%, which shows more resilience than the traditional wine and fruit farming regions.

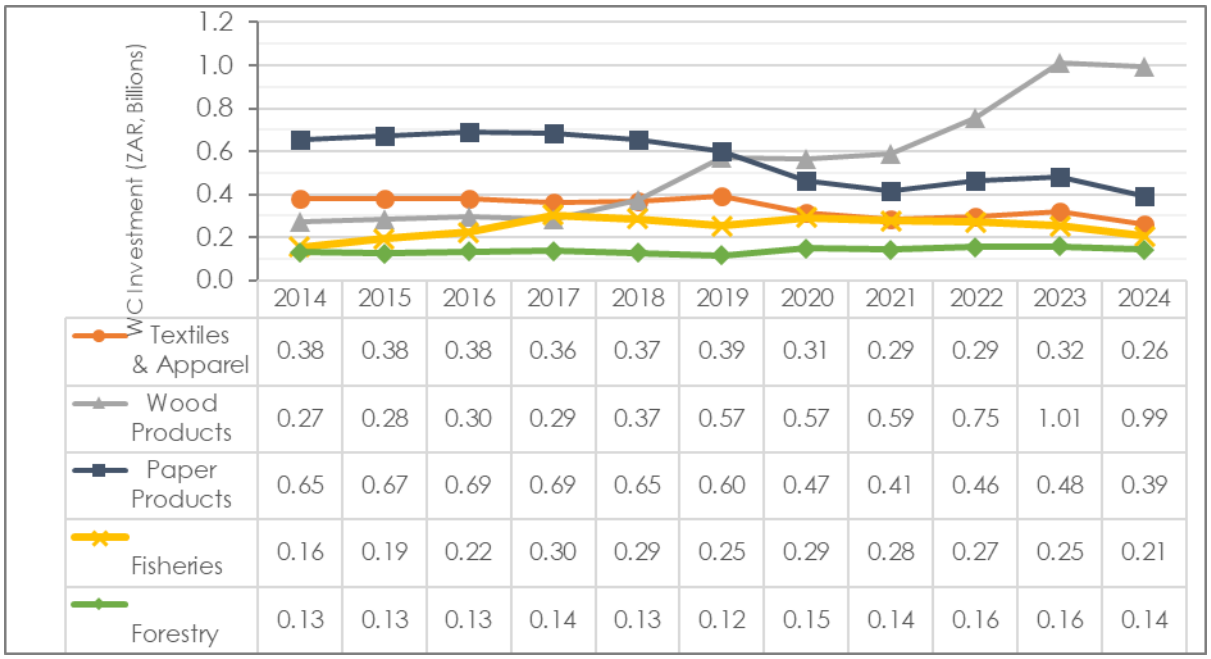
Table 8.2:FBT investment (GFCF) by geography, 2014-2024

	2014		2023		2024		10y Annual Growth
	Rm	Share	Rm	Share	Rm	Share	
City of Cape Town	**2 206**	**55,3%**	**2 208**	**60,3%**	**1 804**	**60,7%**	**-1,99%**
City of Cape Town	**2 206**	55,3%	**2 208**	60,3%	**1 804**	60,7%	-1,99%
West Coast	**513**	**12,9%**	**553**	**15,1%**	**461**	**15,5%**	**-1,07%**
Matzikama	**56**	1,4%	**44**	1,2%	**48**	1,6%	-1,44%
Cederberg	**52**	1,3%	**55**	1,5%	**63**	2,1%	1,92%
Bergrivier	**70**	1,8%	**70**	1,9%	**85**	2,9%	1,98%
Saldanha Bay	**189**	4,7%	**165**	4,5%	**181**	6,1%	-0,41%
Swartland	**161**	4,0%	**171**	4,7%	**194**	6,5%	1,90%
Cape Winelands	**881**	**22,1%**	**531**	**14,5%**	**405**	**13,6%**	**-7,48%**
Witzenberg	**96**	2,4%	**71**	1,9%	**78**	2,6%	-2,06%
Drakenstein	**327**	8,2%	**165**	4,5%	**170**	5,7%	-6,31%
Stellenbosch	**248**	6,2%	**127**	3,5%	**130**	4,4%	-6,24%
Breede Valley	**119**	3,0%	**79**	2,1%	**85**	2,9%	-3,32%
Langeberg	**136**	3,4%	**68**	1,8%	**70**	2,4%	-6,42%
Overberg	**117**	**2,9%**	**123**	**3,3%**	**101**	**3,4%**	**-1,48%**
Theewaterskloof	**52**	1,3%	**53**	1,5%	**44**	1,5%	-1,75%
Overstrand	**41**	1,0%	**40**	1,1%	**32**	1,1%	-2,30%
Cape Agulhas	**13**	0,3%	**16**	0,4%	**13**	0,4%	0,50%
Swellendam	**11**	0,3%	**14**	0,4%	**11**	0,4%	0,11%
Eden	**264**	**6,6%**	**239**	**6,5%**	**194**	**6,5%**	**-3,02%**
Kannaland	**19**	0,5%	**11**	0,3%	**9**	0,3%	-7,78%
Hessequa	**17**	0,4%	**19**	0,5%	**15**	0,5%	-1,38%
Mossel Bay	**47**	1,2%	**38**	1,0%	**30**	1,0%	-4,43%
George	**112**	2,8%	**107**	2,9%	**88**	3,0%	-2,43%
Oudtshoorn	**44**	1,1%	**39**	1,1%	**32**	1,1%	-3,12%
Bitou	**7**	0,2%	**7**	0,2%	**6**	0,2%	-1,16%
Knysna	**16**	0,4%	**17**	0,5%	**14**	0,5%	-1,44%
Central Karoo	**6**	**0,2%**	**6**	**0,2%**	**4**	**0,2%**	**-3,37%**
Laingsburg	**0**	0,0%	**0**	0,0%	**0**	0,0%	-11,32%
Prince Albert	**2**	0,0%	**1**	0,0%	**1**	0,0%	-2,12%
Beaufort West	**5**	0,1%	**4**	0,1%	**3**	0,1%	-3,52%
Western Cape	***3 988***	***100%***	***3 659***	***100%***	***2 970***	***100%***	***-2,91%***

Source: (Quantec, 2024a)

Figure 8.5 illustrates investment patterns in industries that, while not traditionally categorized as being "exclusively" agri-processing, have significant agri-processing activities through the transformation of agricultural products. These industries represent the cross-linking of agricultural value chains with more broadly understood

manufacturing sectors. In 2024, the year-on-year growth declined for all the investment types compared to the previous year. Paper and paper products declined (-19%) the most year-on-year, followed by fishing (-18%), textiles (-18%), forestry (-9%), and wood and wood products (-2%). The 10-year and 5-year annual growth rate shows growth for wood and wood products (14% and 12% respectively) and forestry (1% and 4% respectively).



	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Textiles & Apparel	0.38	0.38	0.38	0.36	0.37	0.39	0.31	0.29	0.29	0.32	0.26
Wood Products	0.27	0.28	0.30	0.29	0.37	0.57	0.57	0.59	0.75	1.01	0.99
Paper Products	0.65	0.67	0.69	0.69	0.65	0.60	0.47	0.41	0.46	0.48	0.39
Fisheries	0.16	0.19	0.22	0.30	0.29	0.25	0.29	0.28	0.27	0.25	0.21
Forestry	0.13	0.13	0.13	0.14	0.13	0.12	0.15	0.14	0.16	0.16	0.14

Figure 8.5: Investment (CFCF) in WC sectors related to agriculture, 2014-2024
Source: (Quantec, 2025a)

Summary points

- Agricultural investment is of utmost importance as it serves as the backbone for food security and economic development, offering employment opportunities, rural development, and foreign exchange earnings through exports.
- Investment in the WC agricultural sector decreased by 10%, declining from R5.66 billion in 2023 to R5.1 billion in 2024.
- The largest relative agricultural investment increase in 2024 was 3% in research and exploration. The other investment categories all showed negative year-on-year growth.
- Cape Winelands and West Coast accounted for 58.2% of the province's total agricultural investment.
- Real investment in the WC's FBT sector has declined by 19% in 2024.
- The City of Cape Town in 2024 accounted for the largest share, 60.7%, of the total investment in FBT.

Agricultural Infrastructure

9

9. AGRICULTURAL INFRASTRUCTURE

The distribution of agricultural infrastructure across regions often correlates with the type and intensity of agricultural activities predominant in those areas. As shown in Table 9.1, the Cape Winelands stand out for their extensive agricultural infrastructure, reflecting their long history and focus on high-value farming activities. This region, renowned for its wine production, fruit cultivation, and other intensive agricultural operations, boasts the highest number of homesteads, chicken batteries, and nurseries. The prominence of these facilities highlights the region's well-established agricultural base and its need for specialised infrastructure to support diverse farming activities. Homesteads are indicative of a dense population of farm dwellers and managers, while the abundance of chicken batteries points to significant investment in poultry farming. Similarly, the high number of nurseries underscores the region's emphasis on producing plant materials for both local farming and export markets.

Table 9.1: WC Agricultural Production Infrastructure, 2023

	City of CT	West Coast	Cape Winelands	Overberg	Eden	Central Karoo	WC Total
Airfields	7	57	37	27	31	26	185
Chicken Batteries	358	376	801	138	70	0	1 743
Dams	1 154	5 091	7 230	5 510	9 894	2 613	31 492
Feedlots	2	12	10	19	5	4	52
Homesteads	1 201	13 893	22 960	7 897	6 924	3 159	56 034
Nurseries	30	32	77	32	32	2	205
Piggeries	8	42	17	15	16	1	99
Shade Netting (Ha)	124	4 510	5 818	1 079	462	14	12 006
Tunnels (Ha)	10	39	16	3	9	0	77

Data Source: (SIQ, WCDoA, & OABS, 2024)

The West Coast region is another well-established agricultural area in the WC, with notable infrastructure supporting its diverse farming activities. It has the second-highest number of homesteads in the province and leads in tunnels, shade nets, and piggeries. Remarkably, the West Coast accounts for almost half of the shade nets in the province, reflecting its significant investment in protective farming techniques to optimise yields in challenging climatic conditions. In contrast, the Central Karoo, known for its vast farm sizes, has the fewest homesteads outside the City of Cape

Town, emphasising its low population density. In terms of water infrastructure, Eden leads with the highest number of dams, supporting its irrigation-intensive farming. The region's focus on water-dependent crops and dairy farming is facilitated by this abundance of dams.

Table 9.2 provides a closer look at agricultural processing facilities, illustrating how they align with regional farming activities. For instance, Eden, with its strong dairy farming industry, hosts 45% of the province's dairies and the most dip tanks, essential for livestock health. Cape Winelands dominate in packhouses (54%), wine cellars (69%), and olive cellars (58%), reflecting its emphasis on fruit and wine production. Similarly, the West Coast, with its robust fruit farming, has the second-highest number of packhouses (18%). The Eden district, which has a strong livestock industry, leads with 25% of the province's abattoirs.

The West Coast, particularly the Cederberg area, specialises in tea processing facilities, driven by its renowned Rooibos tea industry. These regional differences underscore the province's diverse agricultural strengths and the infrastructure investments tailored to support specific sectors.

Table 9.2:WC Agricultural Processing Infrastructure, 2023

	City of CT	West Coast	Cape Winelands	Overberg	Eden	Central Karoo	WC Total
Abattoirs	4	17	13	9	19	13	75
Crushpens/Diptanks	65	763	281	441	1 377	381	3 308
Dairies	11	75	49	150	234	1	520
Packhouses	3	209	629	198	91	18	1148
Silos	9	39	15	64	32	5	164
Brewery	25	8	23	9	6	0	71
Distillery	4	2	12	4	3	0	25
Fruit Packers	0	11	42	8	5	1	67
Cool Chain	40	5	10	0	0	0	55
Millers	8	6	6	2	7	0	29
Olive Cellar	3	5	32	4	7	4	55
Wine Cellar	53	59	493	78	31	1	715
Tea Processing	4	96	0	1	3	0	104
Other Facilities	212	49	114	34	66	7	482

Data Source: (SIQ, WCDoA, & OABS, 2024)

Summary points

- Infrastructure in the WC is closely linked to the dominant agricultural activities in each region, such as fruit farming, wine production, dairy, and sheep farming.
- The Cape Winelands region leads in infrastructure, with the highest number of homesteads, chicken batteries, nurseries, packhouses (54%), wine cellars (69%), and olive cellars (58%), reflecting its prominence in fruit and wine production.
- The West Coast is known for its significant use of tunnels, shade nets (nearly half of the provincial total), and piggeries. The West Coast also hosts most Rooibos tea processing facilities in Cederberg.
- Eden is dominated by dairy farming, with 45% of the province's dairies and the highest number of dip tanks, as well as a focus on irrigation with the most dams.
- The Eden district has a strong livestock industry, and as such it has the most abattoirs (25%).

Domestic Market 10

10. DOMESTIC MARKET

The number of households in the WC has grown steadily over the past decade, increasing by 27% from 1.6 million in 2014 to 2.2 million in 2025, as illustrated in Figure 10.1 Despite this growth in the number of households, the average household size has remained stable at around three members per household over the past ten years. In 2024, the total population of the WC was estimated at 7.6 million, aligning with the increase in households. The rise in population, coupled with the steady household size, highlights ongoing housing demand and potential pressure on infrastructure and public services in the province, particularly in urban areas where the bulk of new households are likely concentrated.

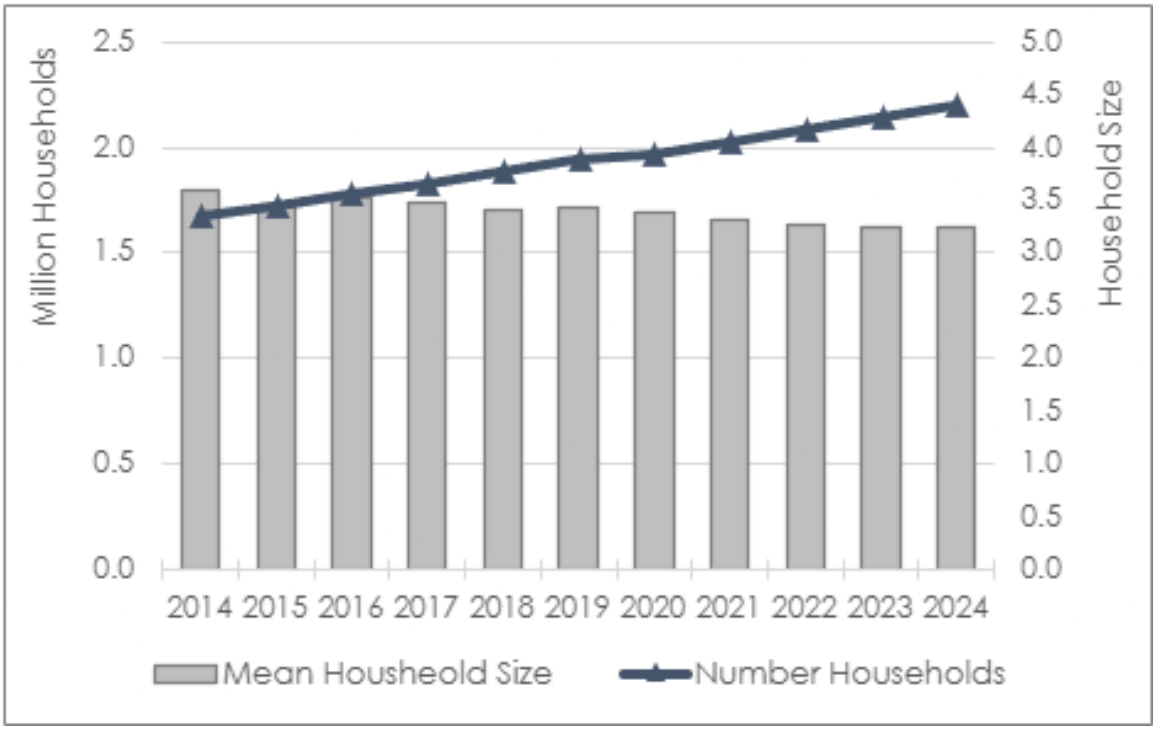


Figure 10.1: Number of households and average household size, 2013-2024
Source: (StatsSA, 2025)

As can be seen in Figure 10.2the household monthly expenditure in lower bracket (R0 – R399) has fallen from 2014 to 2024. This is seen as a positive signal that more families moved out of the lower bracket to a higher bracket. At the higher end of the scale, there are more families in 2024 having higher monthly expenditure than in 2014.

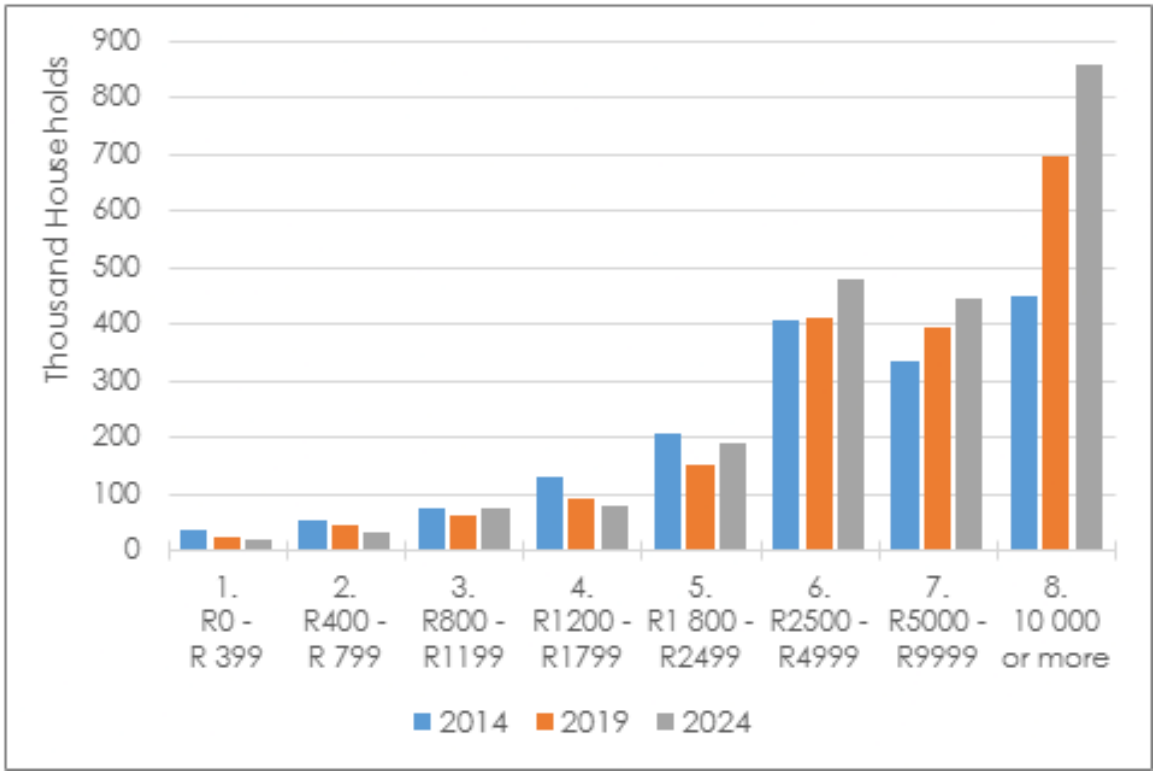


Figure 10.2:Monthly household expenditure, 2013 to 2024
Source: (StatsSA, 2025)

Figure 10.3 shows the prevalence of hunger in the WC categorised as sometimes, often, or always hungry. Between 2017 and 2019, hunger levels among both adults and children were at their lowest, with a smaller proportion of the population reporting hunger. The prevalence of hunger among adults during this time was 12%, while for children, it was around 11%. However, in the post-COVID period, hunger has risen for both groups. For adults, the proportion reporting hunger increased to 15% in 2023, although this remains lower than the 2020 peak of 17%, which reflects the severe economic disruptions caused by the pandemic. Children also experienced a similar rise in hunger levels, with 14% reporting hunger in 2023, up from the pre-pandemic average of 11%. This suggests that while the situation has improved since the peak of the pandemic, lingering economic challenges and inflationary pressures continue to affect food security, particularly for vulnerable households.

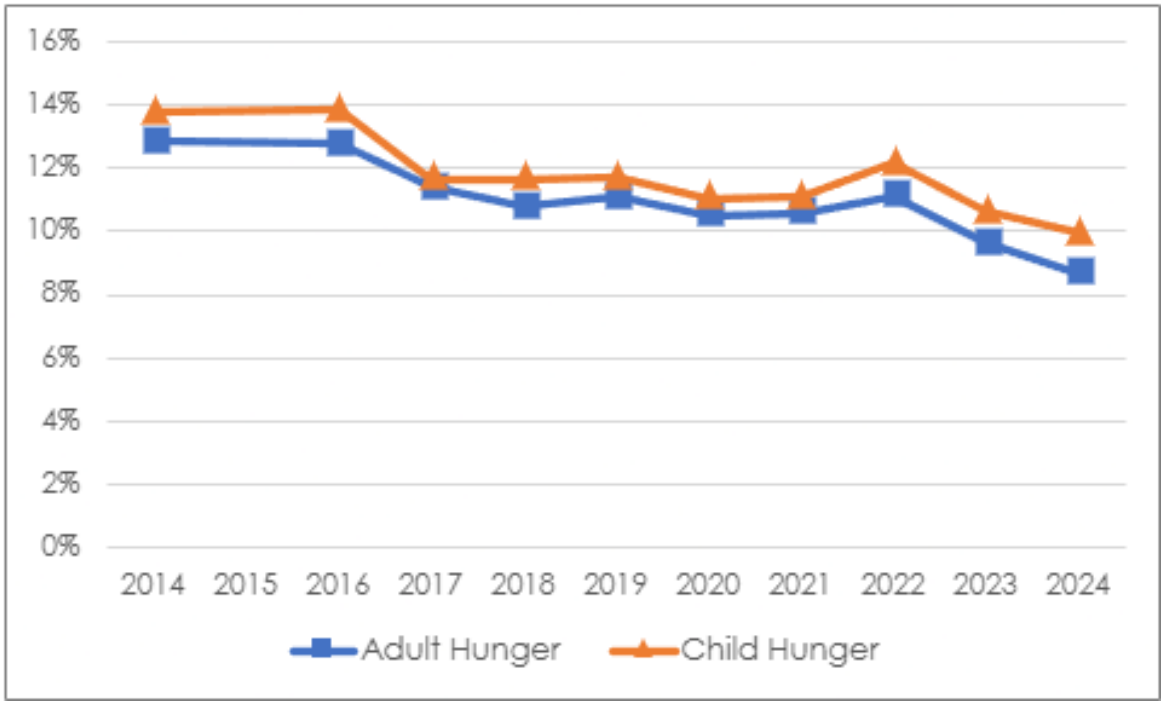


Figure 10.3:Prevalence of Hunger in the WC, 2013-2023
Source: (StatsSA, 2025)

From 2014 to 2024, the headline inflation in the WC mirrored the trends seen at the national level, with both showing a relatively consistent upward trajectory, barring specific periods of divergence. As shown in Figure 10.4, the WC inflation followed the national inflation closely, particularly in the years leading up to 2016. However, a significant divergence occurred between 2016 and 2020, largely driven by the region's severe droughts, which had a substantial impact on local agricultural production and the supply of related goods. The drought conditions led to increased food prices, particularly for staple items like grains, vegetables, and livestock products, which are heavily produced in the region. This caused inflation in the WC to outpace national inflation during these years, as the local supply shortage directly impacted food prices.

From 2022 to 2024, both the WC and national inflation rates experienced a downward trend. This was partly due to the stabilization of key sectors like agriculture, where the effects of the drought had lessened, production levels had recovered, global food supplies improving, the global geopolitical tensions between Ukraine and Russia less intensive, improving global competitiveness of the local agricultural sector, and stabilizing exchange rate amongst other things. Furthermore, the reduction in inflation for items in the selected food basket, such as bread and cereals, meat products, and

milk and other dairy products including eggs was an important indicator of this shift. The stabilization of food prices, coupled with other macroeconomic factors, contributed to the easing of inflationary pressures in the latter part of the review period. This downward trend reflects broader economic stabilization after the COVID-19 disruptions and the return of favourable conditions in agricultural production, both nationally and within the WC.

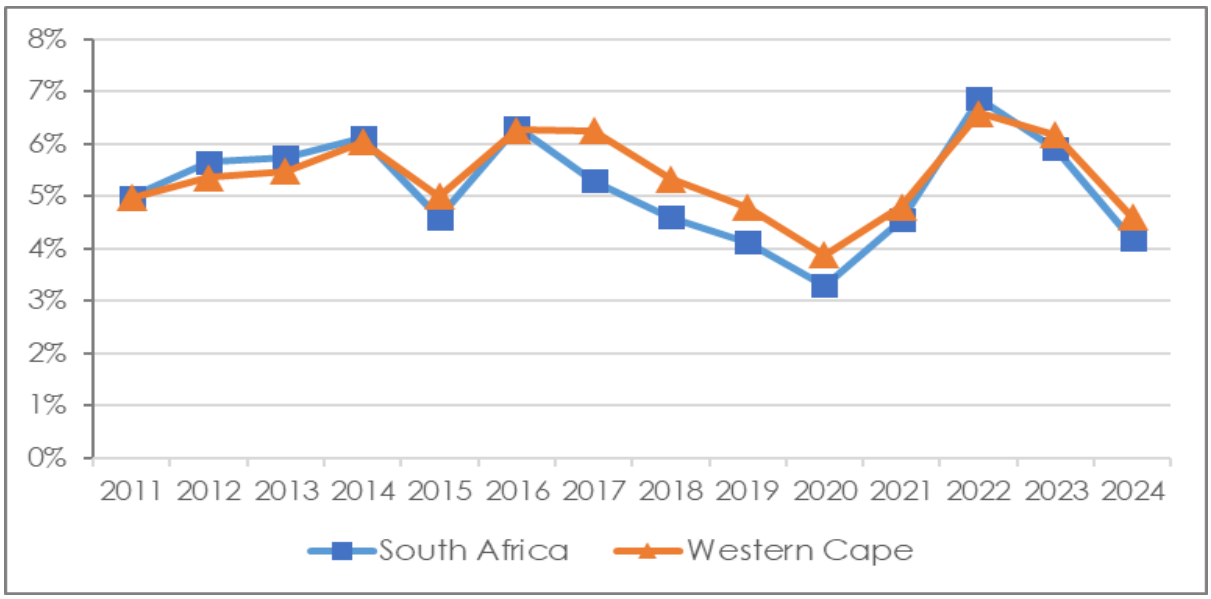


Figure 10.4: National and provincial inflation (CPI), 2014-2024
Source: (StatsSA, 2025)

Figure 10.5illustrates the inflation rates for various categories within the WC in 2024. The headline inflation rate for the WC was 6.2%, a decrease of 0.4% compared to the previous year, indicating a slight easing in overall price pressures. However, food inflation was significantly higher, reaching 10.4%, while non-alcoholic beverages experienced inflation of 9.6%, and alcoholic beverages saw an increase of 7.3%. These figures reflect the broader trend of food price inflation outpacing other goods and services in the province.

Several factors contributed to the elevated food inflation in 2024. The ongoing global geopolitical challenges, particularly the Russia-Ukraine war, have severely disrupted the supply of cereal grains, a staple component of the food basket. The war created supply chain disruptions and increased global commodity prices, which, in turn, influenced domestic food prices. Further, macroeconomic factors such as exchange rates and fluctuations in commodity markets further exacerbated food inflation.

Weather-related factors also played a role, with droughts and irregular weather patterns affecting the availability of certain crops, leading to higher prices.

Another significant contributor to food price inflation was the outbreak of Avian Influenza (AI), and Foot-and-mouth disease, which affected poultry and beef production in South Africa. The culling of many chickens due to the disease sharply reduced the supply of poultry meat and eggs in the local market, driving up prices for these essential food items. However, as these geopolitical events combined with improving global food supplies, the resilience of the agricultural sector of South Africa, and animal diseases become less frequent, the local food supply is expected to improve, leading to a reduction in inflationary pressures on food prices. This would provide relief to households, easing the financial burden caused by higher food costs in recent years.

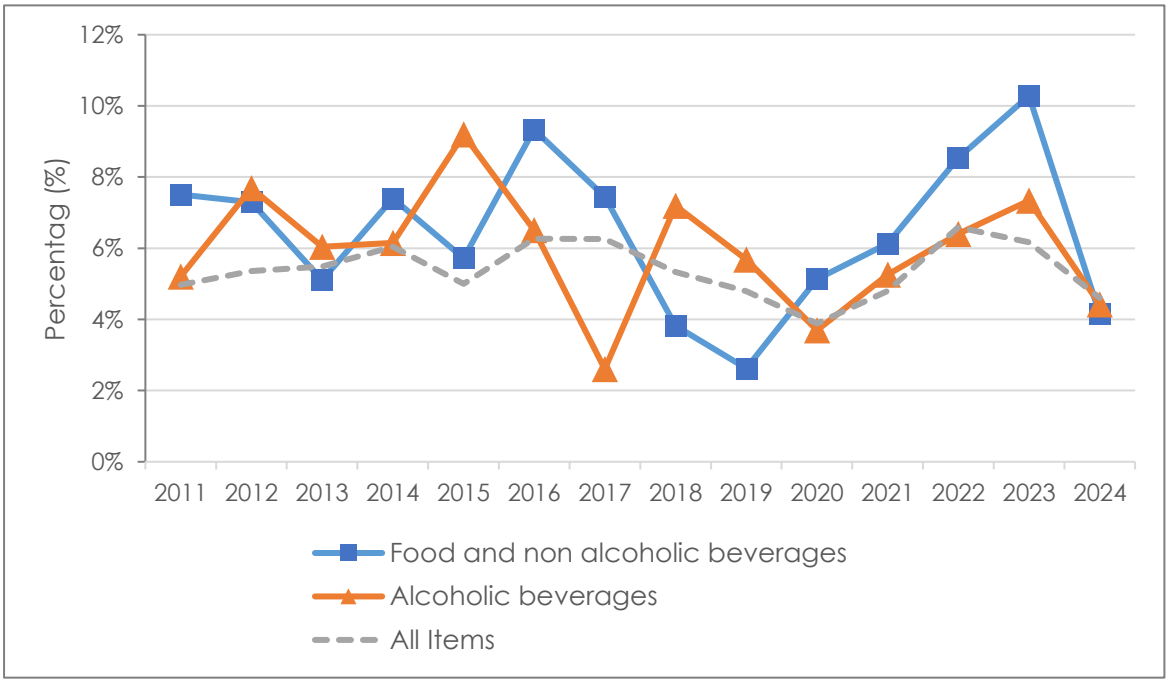


Figure 10.5: WC food, beverage inflation (CPI), 2014-2024
Source: (StatsSA, 2025)

Table 10.1 provides an overview of the selected prices for commodities. Some products are extremely volatile and are indicated by the sharp movements in percentage up or down. Most prices are influenced by the seasonal movement, as can be expected. Examples of this in the sharp rise in meat prices, which is indicative of an end-of-year rise in meat prices annually. Also, some prices are affected by external factors such as the Avian flu that recently gripped the world, causing the price of poultry to rise dramatically.

Table 10.1: Market Price Performance of Select Agricultural Products, 2020-2024

	Annual % Change in Average Prices					5 Year
	2020	2021	2022	2023	2024	Average
WC CPI: Headline	6.3%	5.3%	4.8%	3.9%	4.8%	5.0%
WC CPI: Food & Beverages	7.5%	3.8%	2.7%	5.1%	6.1%	5.0%
Beef: Class A2/A3	13.3%	4.3%	10.4%	20.6%	24.3%	14.4%
Beef: Class AB2/AB3	10.6%	6.6%	12.1%	22.8%	79.7%	23.9%
Beef: Class B2/B3	10.3%	7.6%	11.8%	24.2%	24.1%	15.4%
Beef: Class C2/C3	8.9%	11.0%	10.7%	28.9%	23.6%	16.3%
Mutton: Class A2/A3	15.5%	8.0%	9.5%	22.4%	18.7%	14.7%
Mutton: Class AB2/AB3	14.8%	7.4%	9.2%	22.3%	33.9%	17.1%
Mutton: Class B2/B3	6.2%	8.2%	11.9%	21.4%	-8.9%	7.3%
Mutton: Class C2/C3	11.9%	10.3%	9.1%	22.9%	17.6%	14.2%
Pork: Bacon	11.9%	5.9%	6.7%	13.4%	22.7%	12.0%
Pork: Pork	11.4%	10.4%	3.1%	11.4%	9.1%	9.0%
Pork: Sausage	17.7%	10.3%	-6.1%	24.2%	34.7%	15.3%
Pork: Average	12.0%	6.3%	6.8%	13.0%	21.6%	11.8%
Poultry: Frozen Class A	10.1%	4.2%	0.3%	18.1%	104.5%	22.7%
Poultry: Fresh	28.7%	15.8%	0.8%	16.0%	40.6%	19.6%
Wheat: Kansas City (Winter)	-1.8%	-9.2%	-0.8%	-9.7%	13.1%	-2.0%
Wheat: Minneapolis (Spring)	-1.8%	-9.2%	-0.8%	-9.7%	12.8%	-2.0%
Wheat: Safex	0.0%	3.1%	10.1%	-5.1%	38.9%	8.4%
Lemons	34.5%	0.2%	-5.7%	-2.4%	80.1%	17.4%
Oranges	66.3%	-20.5%	66.4%	10.0%	-17.9%	14.7%
Naartjies	45.4%	12.6%	3.1%	1.9%	24.1%	16.4%
Apples	17.7%	-9.6%	7.5%	1.2%	115.5%	20.1%
Pears	2.5%	11.8%	2.9%	-7.9%	110.7%	18.0%
Plums	156.5%	-1.9%	70.6%	-26.7%	251.8%	61.7%
Peaches	0.2%	28.9%	21.0%	-6.1%	29.6%	13.7%
Strawberries	-36.1%	45.9%	21.9%	29.4%	-92.2%	-35.2%
Table Grapes	6.7%	86.6%	33.8%	12.6%	46.7%	34.5%
Onions	312.6%	1475.1%	94.3%	-37.3%	88.8%	172.2%
Potatoes	0.8%	-19.8%	73.2%	-26.5%	73.9%	12.3%
Tomatoes	21.7%	3.5%	-3.2%	-0.9%	97.9%	19.1%

Source: (WCDoA, 2024c)

Summary points

- WC's households increased by 27%, from 1.6 million in 2014 to 2.2 million in 2024 and the average household size remained stable at 3 members.
- Households with monthly expenditures of R10 thousand or more grew by 110% over the decade but slowed to a marginal increase of 0.14% in 2024. Meanwhile, lower-income households in the R800–R1199 expenditure bracket rose sharply by 70%, reflecting growing income inequality.
- Hunger levels for adults and children increased post-COVID, with 15% of adults and 14% of children reporting hunger in 2023. While better than the pandemic peak, persistent food insecurity reflects lingering economic challenges.
- WC headline inflation decreased to 6.2% in 2023, down from 6.6% in 2022. Food inflation (10.4%) remained high due to geopolitical issues, animal diseases, and macroeconomic factors, while transport inflation dropped significantly to 4.3% due to declining crude oil prices.
- From 2022 to 2023, meat prices for beef and mutton decreased by 6.8% and 12%, respectively. In contrast, pork and chicken prices rose by 33% and 35%.
- Fresh produce like potatoes and onions saw substantial price hikes of 76% and 50%, respectively, driven by supply constraints.

Agri-Tourism

11

11. AGRI-TOURISM

Agri-tourism includes a variety of activities that tourists can enjoy at the farms. The scope of agri-tourism overlaps with several other tourism subsectors, including ecotourism, rural tourism, wildlife/hunting tourism, adventure tourism, geo-tourism, cultural and heritage tourism, and wine tourism. Agri-tourism activities and attractions can be organised into five main categories: outdoor recreation, educational experiences, entertainment, hospitality services, and direct sales on the farm.

Table 11.1, below, outlines the WC agri-tourism infrastructure and its concentration among the six districts in the province. The most prevalent agritourism activity is providing accommodation, with over 1150 farms offering lodging to tourists. This represents a significant portion of agritourism activities, reflecting the growing demand for farm-based stays. Restaurants and conference venues are the second most common agritourism features, with each having 482 facilities located on farms, and conferences are used for various events.

Table 11.1: WC Agri-tourism Infrastructure, 2024

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

Data Source: (WCDoA, 2024)

Agri-tourism is an important source of additional income and job opportunities for many farms, contributing to the diversification of agricultural activities. Hiking and mountain biking are also highly popular activities in the province, with numerous farms offering trails and outdoor experiences to attract visitors.

The Cape Winelands region stands out as the most active in terms of agritourism, accounting for nearly 38% of the province's total farm accommodations, 53% of restaurant facilities, and 53% of farm-based restaurants. This region's popularity is largely driven by its renowned vineyards, scenic landscapes, and proximity to urban centres.

The Overberg region is particularly favoured by hiking and mountain biking enthusiasts, with the largest number of hiking trails in the province, providing ample opportunities for outdoor tourism. Agritourism has become an essential component of the region's economic activity, supplemented by traditional farming while enhancing local economies through tourism. The WC is known as the prime global tourism destination and the major producer of wine in the country. A number of regions in the province contribute wine tourism by route, and these include Durbanville, Franschhoek and Stellenbosch, Agulhas and Elgin, among others.

Summary points

- Farm-based lodging is the most popular agritourism activity, with over 1150 farms offering accommodation for tourists.
- Hosting events is the second most popular activity, with 482 farms operating conference facilities.
- The Cape Winelands dominate agritourism, hosting 43% of farm accommodations and 53% of conference centres and restaurants.
- The Overberg region stands out for outdoor recreation, boasting the most hiking trails and mountain biking routes.

Water

12

12. WATER

The South African water sector is facing challenges of unprecedented dimensions due to historical inequalities, urbanisation, climatic volatility, and ageing infrastructure. The country, which is water-scarce with 450mm mean annual rainfall compared to the world average of 860mm, must navigate complex socio-economic and environmental responsibilities to attain water security for its 60 million (61.9 million in 2024) inhabitants (Department of Water and Sanitation, 2019). The WC (WC) was worst affected in modern South African history during the 2017-2018 water crisis, when Cape Town nearly became the first major city in the world without water—a phenomenon known as "Day Zero" (Muller, 2018).

The province is still facing ongoing challenges that are contributing to the decline of its water resources, which includes the degradation of its water infrastructure, vandalism and theft due to inadequate security funding (to protect these water systems), the increase of extreme weather events and the management of catchment and river maintenance is unsatisfactory (EADP, 2024). Increased costs of water treatment, loss of biodiversity and diminishing ecosystem services in altered rivers are just some of the impacts that the poor state of inland water has. The importance of reliable water provision is critical for human health and economic consequences (EADP, 2024). High groundwater abstraction, as well as pressure from agricultural practices, are having a significant impact on Wetlands, especially in the Sandveld region; on the other hand, the Theewaterskloof and Voëlvlei dams are experiencing significant reductions due to Invasive Alien Plants (IAPs) impacting the dam levels (EADP, 2024). The province is implementing and looking at strategic initiatives concerning water security, infrastructure, and balancing water usage needs between agriculture and municipalities/households. Also, addressing challenges that were identified in the comprehensive groundwater management and planning studies (Berg WAAS and the Berg Water Resources Classification Study) (EADP, 2024). This chapter provides an overview of the inland water outlook, WC dam specifications, national sectoral use of water, WC water outlook, and the raw water tariffs. Table 12.1 provides an overall overview of inland water outlook indicators for the WC province in 2024, with varied but concerning trends in three major areas.

Table 12.1: Inland Water: Outlook Indicators 2024

Indicator	Quantification	Target/desired State	Trend
Water availability	• The WCWSS is currently over-allocated. • The WC economy faces water constraints, regardless of good rainfall seasons. • All agricultural water has been fully allocated in the WC – effort must be placed to develop alternative sources and to improve agricultural efficiency. • The yields of several dams within the WCWSS remain affected by the existing spread of IAPs. ***Positive factors that can be emphasized:*** • Most of the WC province is not currently experiencing any droughts. • There has been a significant renewed effort towards expanding water supply capacity in the WC.	• No yield exceedances. • Adequate water supply for all towns.	**Decline** 
Fitness for use	• 18 water systems within the WC are currently in a critical state; an increase from 9 systems in 2023. • The provincial Risk Ratio for treatment plants has remained relatively stable, changing only slightly from 52.7% in 2013 to 53.1% in 2021.	• No intolerable water quality. • Zero stations with extreme high levels of microbial contamination.	**Decline** 

		• Ecological functioning.	
Freshwater ecosystem health	***Ecological state of rivers (Present Ecological State – PES):*** • 50% unmodified, natural, largely natural • 17% moderately modified • 20% largely or seriously modified ***Strategic Water Source Areas (SWSA):*** • Despite the importance of SWSAs, the majority are only partially protected. The quality of water streams in urban areas is a concern; if this water quality matter is not dealt with the expectation is for this to decline in state for the near future. The current stable state is upheld by water authorisation and reviews, such as freshwater ecosystems, which are consistently considered with new developments and planning. Resource quality objectives are guiding this and act as a clear guideline for development. Other than WC urban areas, there is no critical decline in the state of rivers based on parameters from habitat assessments, etc., which do not indicate a steep decline.	• No streams seriously or critically modified.	**Stable** 

Source: EADP, 2024

Water availability shows a declining trend despite some positive factors. The WC Water Supply System (WCWSS) is over-allocated, creating economic constraints regardless of rainfall conditions. Alternative water sources are required as all agricultural water allocations are exhausted, which also results in improved efficiency required. Dam yields are still hampered by IAPs. Despite the negative, some of the positive aspects indicates that most of the province is not in drought, significant efforts are being made to expand the province's water supply capacity, and the municipal water supply are sufficient. Fitness for Use has also shown a declining trend, with severe water systems doubling from 9 to 18 between 2023 and 2024. Provincial treatment plant risk ratio has remained stable. No unacceptable water quality issues or high levels of microbial contamination are found.

Freshwater Ecosystem Health is stable, with 50% of rivers remaining in their original or natural state, 17% moderately changed, and 20% largely or seriously changed. Strategic Water Source Areas are conservatively only partially preserved although important. While urban water stream quality poses concerns for the future, the overall river state outside urban areas show no critical decline, supported by water authorization processes and resource quality objectives that guide development decisions.

Table 12.2 illustrates comprehensive specifications for the WC Water Supply System's dam facilities, showing a network of 15 dams with varying capacities and ownership structures. The major regional dams form the backbone of the system, with three large-capacity facilities owned by the Department of Water and Sanitation (DWS). The largest is Theewaterskloof, 480,250 megalitres, completed in 1978 on the Riviersonderend River near Villiersdorp. Voëlvlei (164,122 ML) was completed in 1971, drawing from several rivers including Klein Berg, Leeu and Twenty-Four Rivers near Gouda. he biggest of the new large structures is the Berg River Dam (130,000 ML), completed in 2009 on the Berg River at Franschhoek. City of Cape Town (CCT) Facilities comprise most of the dams, which are 11 small facilities ranging from 58,644 ML to 126 ML. The geographic coverage ensures strategic placement across the WC, from Table Mountain's series of small historic reservoirs right up to larger regional nodes in Villiersdorp, Franschhoek, and Gordon's Bay, offering diversified source protection and system redundancy across the province's water distribution system.

Table 12.2: Western Cape Water Supply Systems - Dam Specifications

Name	Location	Water source	Ownership	Completed	Capacity (Ml)
Theewaterskloof	Villiersdorp	Riviersonderend River	DWS	1978	480 250
Voëlvlei	Gouda	Klein Berg, Leeu and Twenty-Four Rivers	DWS	1971	164 122
Berg River	Franschhoek	Berg River	DWS	2009	130 000
Wemmershoek	Franschhoek	Wemmers River	CCT	1957	58 644
Steenbras Lower	Gordon's Bay	Steenbras River	CCT	1921	33 517
Steenbras Upper	Gordon's Bay	Steenbras River	CCT	1977	31 767
Kleinplaats	Simon's Town	Bokram Spruit River	CCT		1 368
Woodhead	Table Mountain	Disa River	CCT	1897	954
Hely-Hutchinson	Table Mountain	Disa River	CCT	1904	925
Land-en-Zeezicht	Somerset West	Lourens River and boreholes	CCT	1973	451
De Villiers	Table Mountain	Disa Stream	CCT	1910	243
Lewis Gay	Simon's Town	Bokram Spruit River	CCT		182
Victoria	Table Mountain	Original Disa Stream	CCT	1896	128
Alexandra	Table Mountain	Original Disa Stream	CCT	1903	126
Kleinplaas Balancing Dam	Jonkershoek Valley near Stellenbosch	Balancing Dam for Theewaterskloof water/ Jonkershoek Tributary	DWS		

Source: City of Cape Town, 2018

Table 12.3 provides a national strategic snapshot of water use prospects across six key sectors, showing varied challenges and conservation strategies to South Africa's water future. Municipal and Residential water use is under huge growth pressure originating on the eradication of service backlog and population growth, with rapid demand growth expected within the short to medium term. The national strategy targets reducing per capita consumption to 175 litres per day by 2025 while addressing infrastructure loss via leak elimination and system efficiencies. Agriculture and Forestry must balance growing food demand and export-led agriculture within strict water constraints. The outlook limits further irrigation allocations, requiring sector expansion through internal water savings and efficiency improvements rather than new water sources, reflecting the sector's maturity and resource limitations.

Table 12.2: National level strategic overview – Outlook for water use sectors

Sector	Key Aspects	Outlook for Water Use
Municipal & domestic	Need for eradication of service backlog, leaks, and system losses.	• Anticipate rapid growth in water demand over the short to medium term. • National goal to reduce per capita consumption to 175 litres per capita per day by 2025
Agriculture & forestry	Demand for food for the growing population. Export led agriculture.	• Limit further allocations to irrigation. • Expansion of irrigated area to come from water savings within the sector.
International obligations	Commitments through international agreements.	• SA will honour its international water obligations in line with protocols.

		• Increase imports from other countries.
Strategic power generation	South Africa's energy mix is still dominated by coal-fired power with water-based cooling. The aim is to have an energy mix that considers multiple objectives, including cost and carbon intensity.	• Integrated Resource Plan for energy for low low-carbon economy and renewables – likely less water use. • Power imports from other countries, e-g. Inga Dam hydro power scheme.
Mining & industry	Key driver of economic growth and development of the country.	• Future growth is anticipated for the industry. • Minimal growth in water uses due to implementation of Water Conservation and Water Demand Management (WC/WDM) and re-use. • The future of coal use and export is expected to decline gradually.
Ecosystem	Environmental water requirement is prescribed in law.	• Implement allocations regimes, protect & improve water source areas.

Source: GreenCape, 2025

International obligations maintain South Africa's commitment to regional water agreements and protocols while exploring increased water imports from neighbouring countries, ensuring diplomatic water security alongside domestic needs. Strategic Power Generation offers promising water reduction opportunities through energy transformation. The coal-dominated energy mix with water-intensive cooling systems

is shifting toward the Integrated Resource Plan emphasizing low-carbon renewables and power imports like the Inga Dam hydropower scheme, potentially reducing overall water demands significantly. Mining and Industry sectors expect continued economic growth with minimal water use increases through aggressive Water Conservation and Water Demand Management (WC/WDM) implementation and recycling programs. The gradual decline in coal use and export further supports reduced water intensity in these sectors. Ecosystem water requirements remain legally protected, with implementation focusing on allocation regimes and water source area protection and improvement, ensuring environmental sustainability underpins all sectoral water planning decisions. Table 12.4 summarise the current state and the strategic direction of the WC's water management system, highlighting both the achievements and ongoing challenges.

Table 12.3: Western Cape Water Overview

Aspect	Details
Dam Levels – June 2024	WCWSS at 68.4% (73.6% for June 2025); Minor Dams percentage stored at 59.8% (70.0% for June 2025).
Major Dams	Theewaterskloof, Wemmershoek, Berg River, Steenbras, Voëlvlei
Water Supply System	WCWSS serves 3+ million people, including Cape Town and surrounding municipalities
Investment (2025/26)	R32 million for infrastructure upgrades and expansion (priority projects, for example, Dassieshoek Dam in Langeberg)
Water Usage Allocation	***Agriculture*** – 61% ***Municipal use*** – 27% (Incl. industrial and commercial users provided from municipal systems) ***Power generation, mining, etc.*** – 12%
Water Conservation	Per capita household consumption reduced since 2017 drought
Future Strategy	Cape Water Resilience Strategy 2035 aiming to add 341 million m³/year by 2035
Challenges	Limited new bulk storage, climate change impacts, population growth, socio-economic factors

Source: City of Cape Town, 2025; South African Government, 2025; Claasen, 2025; Dondolo, 2025; Western Cape Government, 2025; GCIS, 2024

Figure 12.1 is just a visual representation of Table 12.4 showing the distribution of water usage across different sectors, showing a clear agricultural dominance in water consumption patterns.

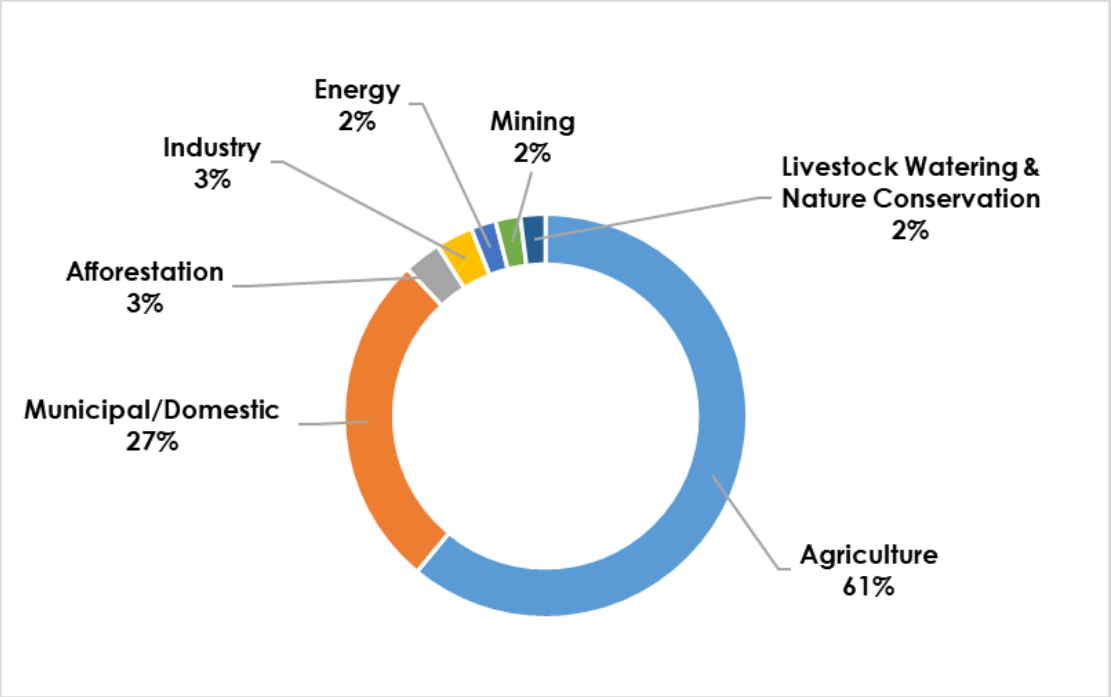


Figure 12.1: Water allocations
Source: CGIS, 024; CSIR, 2023

Table 12.5 shows the breakdown of South Africa's registered dams by size class and ownership types. From the Table, small dams are in the majority with 76.7% of the total dams, followed by medium dams (20.1%). Large dams account for only 3.2% of the total dams. Focusing on ownership, agriculture is by far the largest owner of dams (79.9%), followed by municipalities (6.2%), mines, industry and business sector (5.9%) and DWS (5.7%). A noteworthy trend from the data indicates that agricultural ownership decreases dramatically with dam size (3 764 small vs 21 large dams), while DWS ownership increases with dam size. DWS owns 58.5% (107 out of 183) of all large dams. The inverse relationship between agricultural ownership and dam size likely reflects different water storage needs and infrastructure investment capabilities.

Table 12.4: Table 12.5: Number of registered dams and associated ownership

Size class	Number of dams per ownership						Total	Percent per class
	DWS	Municipalities	Other state depts	Water Boards	Mines, Industry, Business	Agriculture		
Small	79	193	54	39	246	3764	**4375**	**76.7%**
Medium	137	130	28	14	65	775	**1149**	**20.1%**
Large	107	29	2	1	23	21	**183**	**3.2%**
Total	**323**	**352**	**84**	**54**	**334**	**4560**	**5707**	**100%**

Source: DWS, 2025

Table 12.6 highlights the distribution of registered dams across South Africa's six Water Management Areas. Breede-Olifants WMA has the highest concentration with 1 652 dams (29% of the total), indicating this WC region has the most intensive dam infrastructure. Breede-Olifants also leads in larger dams with 1 002 Category II & III dams.

Table 12.6: Number of registered dams in each water management area

No.	Water Management Area	Total no. of dams	% Registration per WMA	Cat II & III per WMA
1	Limpopo-Olifants	883	15%	429
2	Inkomati-Usuthu	281	5%	99
3	Pongola-Mtamvuna	1079	19%	283
4	Vaal-Orange	925	16%	361
5	Mzimvubu-Tsitsikamma	885	16%	269
6	Breede-Olifants	1652	29%	1002
Total		**5705**	**100%**	**2443**

Source: DWS, 2025

The high concentration in Breede-Olifants likely reflects the WC's Mediterranean climate, requiring extensive water storage for agriculture and urban supply. Figure 12.2 is just a visual representation of Table 12.6 showing how South Africa's 5 705 registered dams are distributed across the six Water Management Areas.

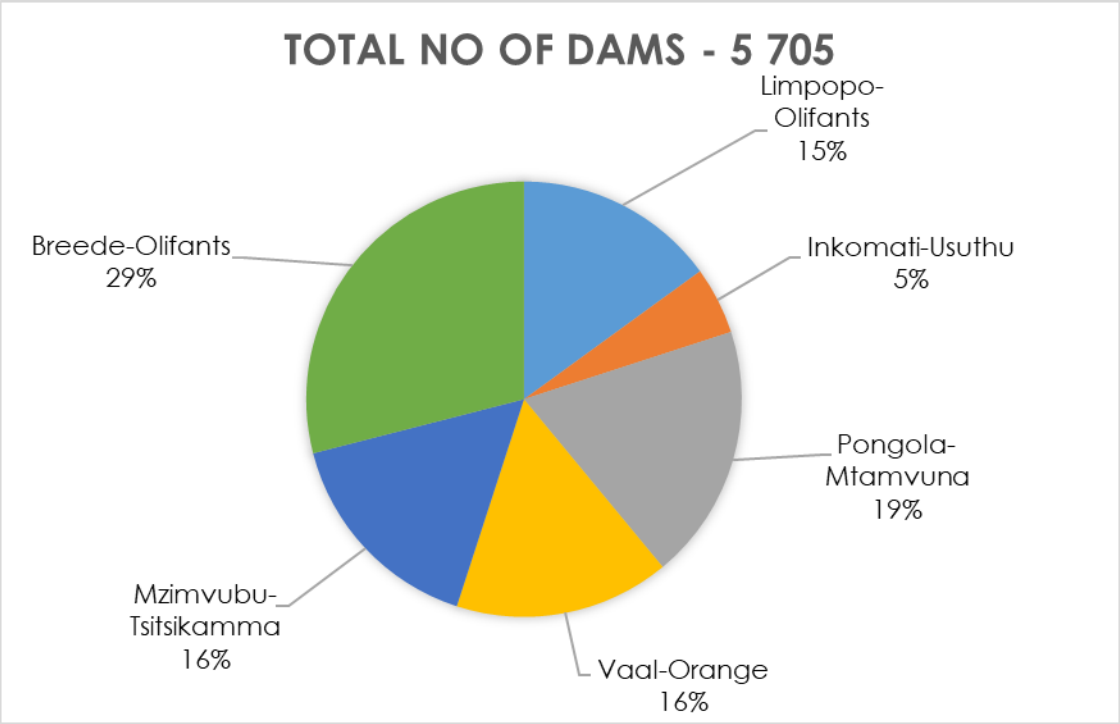


Figure 12.2: Dam safety evaluation reports

Source: DWS, 2025

Figure 12.3 illustrates critical insights about dam verification progress across South Africa's Water Management Areas for the 2024/25 financial year, showing significant variations in both verification volumes and completion rates. The high performers are Vaal-Orange WMA leading with approximately 20 000 verified properties and 75% completion rate, followed by Limpopo-Olifants WMA has about10 000 verified properties with a 50% completion rate. The moderate performers were Pongola-Mtamvuna WMA shows approximately 8 000 verified properties with a 55% completion rate, followed by Mzimvubu-Tsitsikamma WMA has about 9 000 verified properties but only a 45% completion rate. The problem areas are with Breede-Olifants WMA, despite having the most dams (29% from Figure 12.2), shows concerning verification performance with only about 8 000 verified properties and a 30% completion rate, followed by Inkomati-Usuthu WMA has the lowest absolute numbers (approximately 5 000 verified) but a reasonable 18% completion rate given its smaller dam inventory.

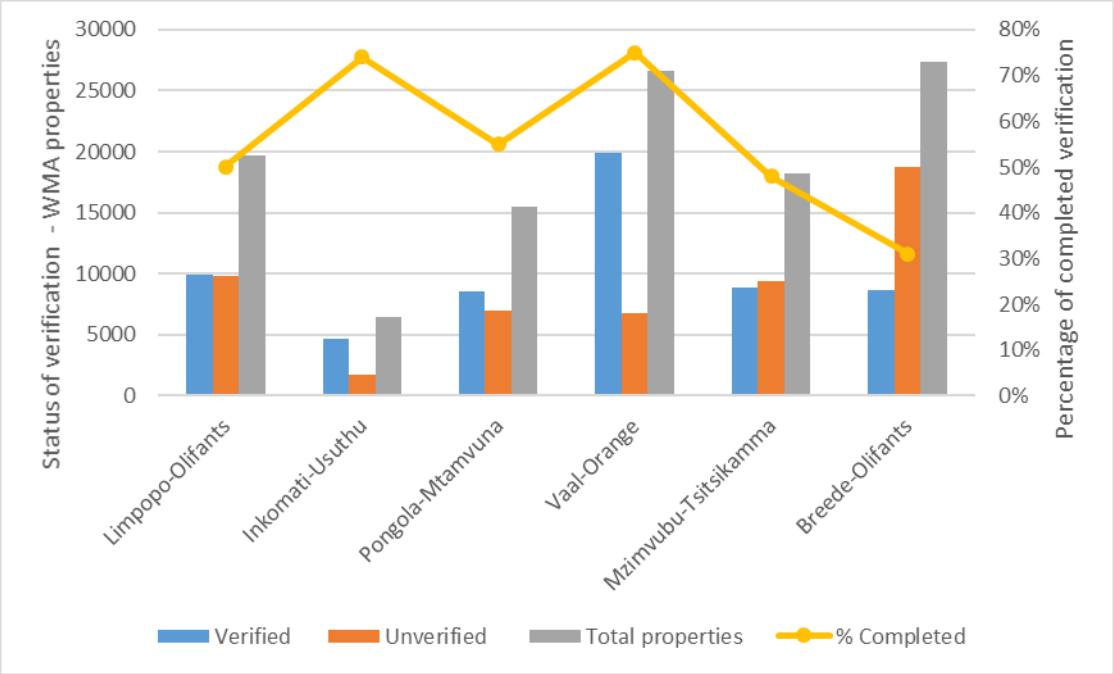


Figure 12.3: Status of verification for the 2024/25 financial year

Source: DWS, 2025

The poor performance of Breede-Olifants WMA can be due to significant capacity and resource constraints. The large number of unverified properties across all WMAs indicate substantial outstanding verification work as well, which highlights that dam safety verification efforts need strategic realignment, particularly in regions with high dam concentrations like Breede-Olifants.

Figure 12.4 shows significant trends in WC raw water tariffs compared to the national average from 2016 - 2024, showing how water pricing has evolved across different user categories. Key trends identified are Domestic & Industry tariffs show the most dramatic increases, rising from around 4.35 R/m³ in 2016 to over 6.0 R/m³ in 2024. Berg Olifants and Breede Gouritz schemes show similar upward trajectories, with Berg Olifants consistently slightly higher. Forestry tariffs remain relatively stable and low (approximately between 0.88 and 3.1 R/m³) across all years, while Irrigation shows moderate increases from around 1.99 R/m³ to 3.4 R/m³. The gap between domestic/industrial and agricultural sectors (irrigation and forestry) has widened significantly.

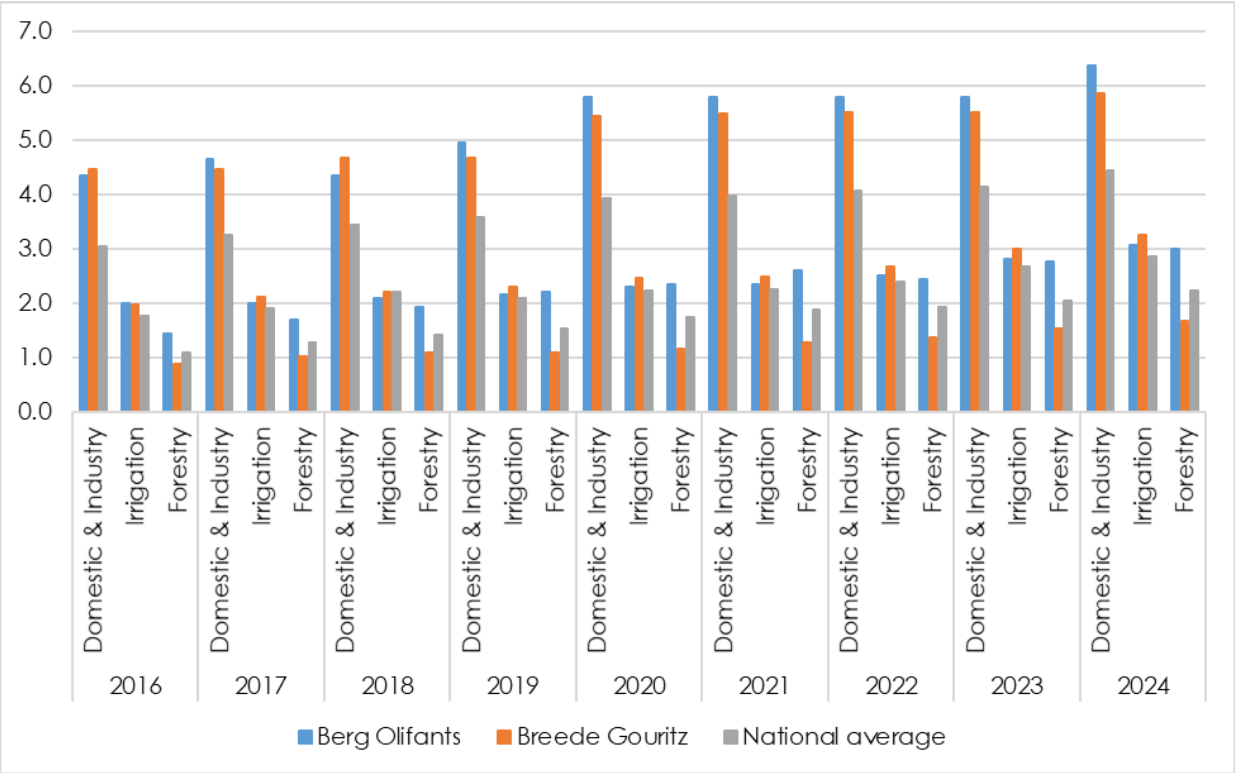


Figure 12.4: WC Raw Water Tariffs and National Average (2016 – 2024)

Source: DWS, 2025

National average tariffs are consistently lower than WC tariffs across all categories. The premium for WC raw water has increased over time, particularly post-2018. The steep increases from 2018-2020 likely reflect responses to the Cape Town water crisis and subsequent infrastructure investments. Also, WC's consistently higher tariffs compared to national averages reflect the region's water scarcity challenges and infrastructure costs.

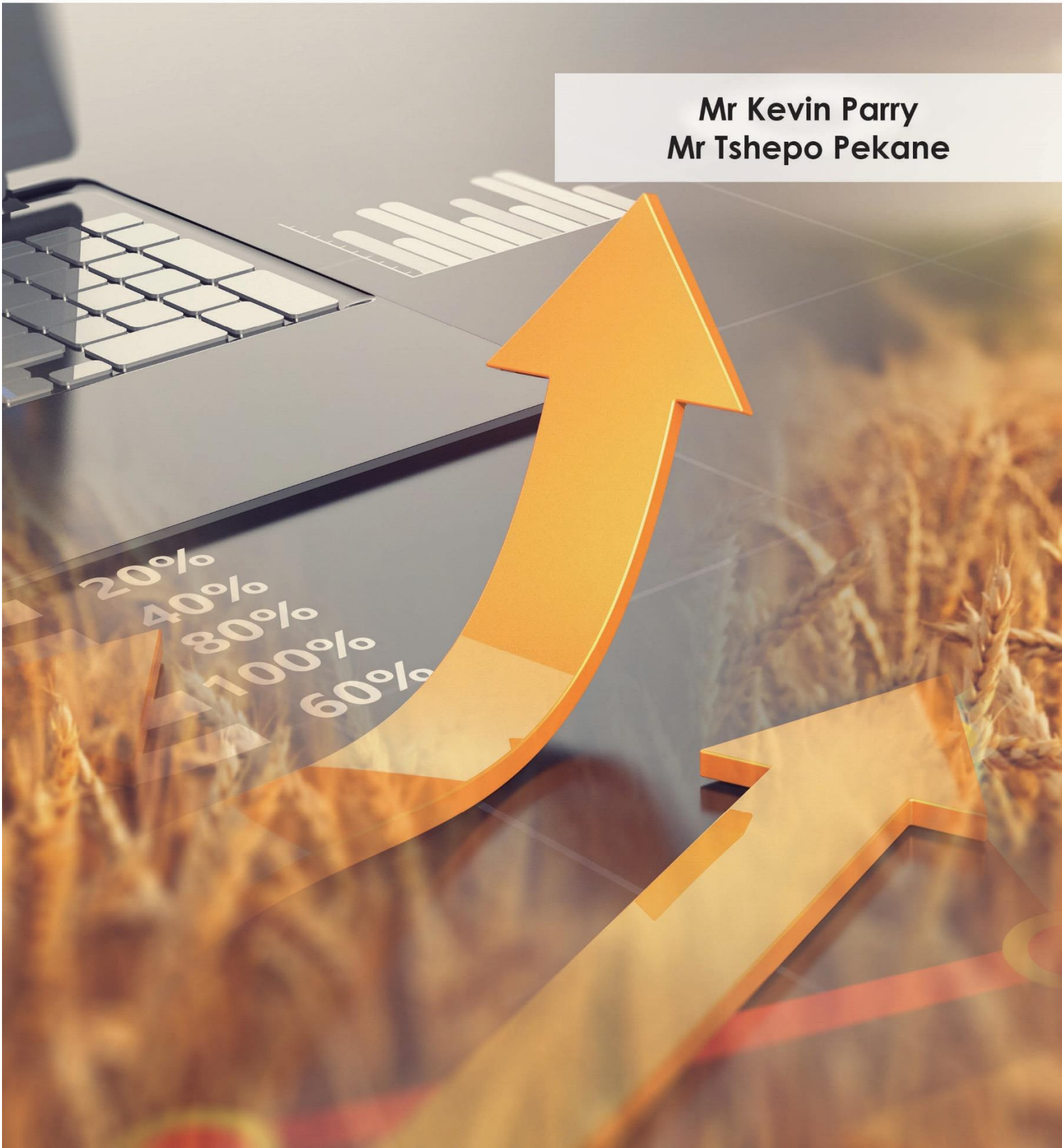
Summary Points

- Water availability shows a declining trend with the WC Water Supply System (WCWSS) currently over-allocated, creating economic constraints regardless of rainfall.
- Critical water systems have doubled from 9 to 18 between 2023 - 2024, while all agricultural water allocations are exhausted, requiring alternative sources and improved efficiency.
- Agriculture owns 79.9% of South Africa's 5 707 registered dams.
- Agricultural ownership decreases dramatically with dam size (3 764 small vs 21 large dams), while the Department of Water and Sanitation owns 58.5% of large dams, reflecting different infrastructure investment capabilities.
- The Breede-Olifants Water Management Area contains 29% of all national dams (1 652 dams) but shows concerning verification performance with only 30% completion rate.
- WC raw water tariffs have increased dramatically, with domestic/industrial rates rising from approximately 4.35 R/m³ in 2016 to over 6.0 R/m³ in 2024 - consistently higher than national averages.
- The province is implementing the Cape Water Resilience Strategy 2035, aiming to add 341 million m³/year capacity while investing R32 million in infrastructure upgrades for 2025/26.

Special Focus: Western Cape Commercial Agricultural Survey by Statistics South Africa

13

Mr Kevin Parry
Mr Tshepo Pekane



13. SPECIAL CHAPTER: WESTERN CAPE COMMERCIAL AGRICULTURAL SURVEY BY STATISTICS SOUTH AFRICA

The Western Cape plays a pivotal role in agriculture. According to the 2023 provincial gross domestic product (GDP) figures, the province was the second largest player in South African agriculture after KwaZulu-Natal, accounting for 22% of agricultural value added (Stats SA, 2024). The province also leads in other indicators, according to the latest survey covering the commercial agriculture industry (Stats SA, 2025). The survey, conducted in 2023, was based on a large sample of farmers registered for value-added tax (VAT). The results provide insight into the contributions that the Western Cape makes in terms of income, employment and production.

13.1 Income

National commercial agriculture generated R491.7 billion in 2023, with the Western Cape accounting for the largest share (20,6%). Free State was the second largest contributor, followed by Gauteng (Figure 13.1).

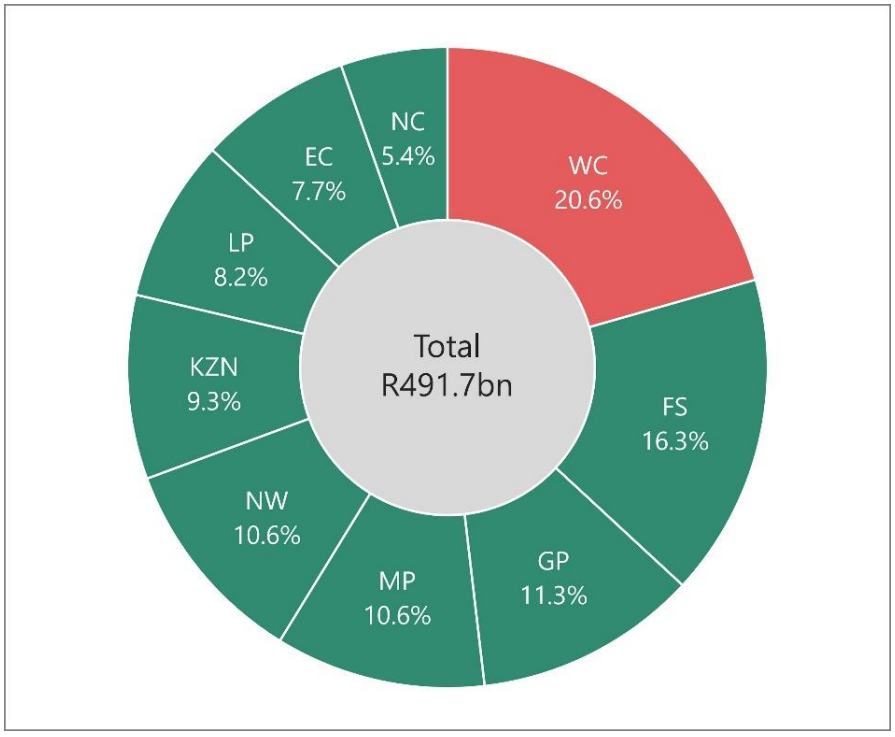


Figure 13.1: Provincial contribution to total income in the commercial agricultural industry, 2023
Source: (Stats SA, 2025)

Figure 13.2 highlights the activities that drive commercial agriculture in each province. The Western Cape is heavily dependent on horticulture, with the activity accounting for just over half of gross farming income. Livestock farming was the second largest activity in the Western Cape in 2023, followed by field crops.

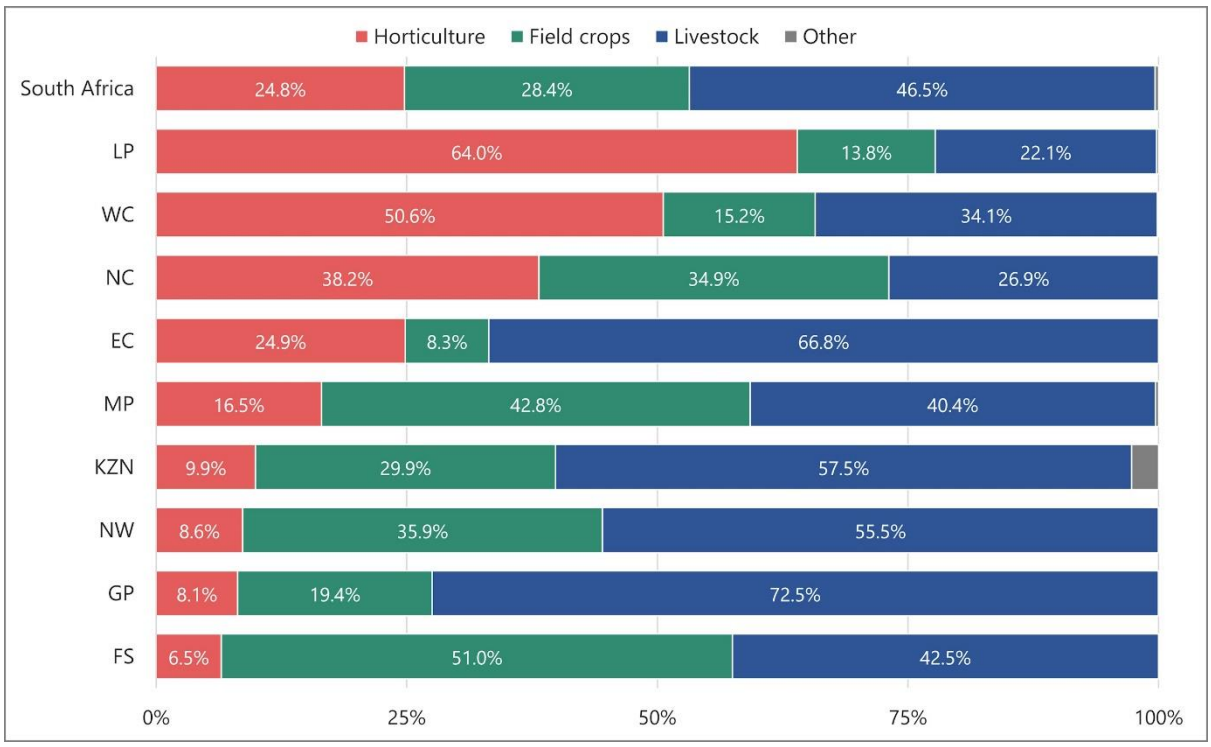


Figure 13.2: Gross farming income by type of activity in each province, 2023 (sorted by horticulture)
Source: Stats SA, 2025

Horticulture was also the most important agricultural activity in Limpopo and the Northern Cape. Field crop production leads in the Free State and Mpumalanga. Livestock farming was dominant in Gauteng, Eastern Cape, KwaZulu-Natal and North West.

13.2 Employment

Commercial agriculture also plays an important role in employment. Nationwide, the industry secured work for 770 181 individuals in 2023. Western Cape was the leading employer, accounting for just over a quarter (or 195 984 individuals) of the national workforce (Figure 13.3).

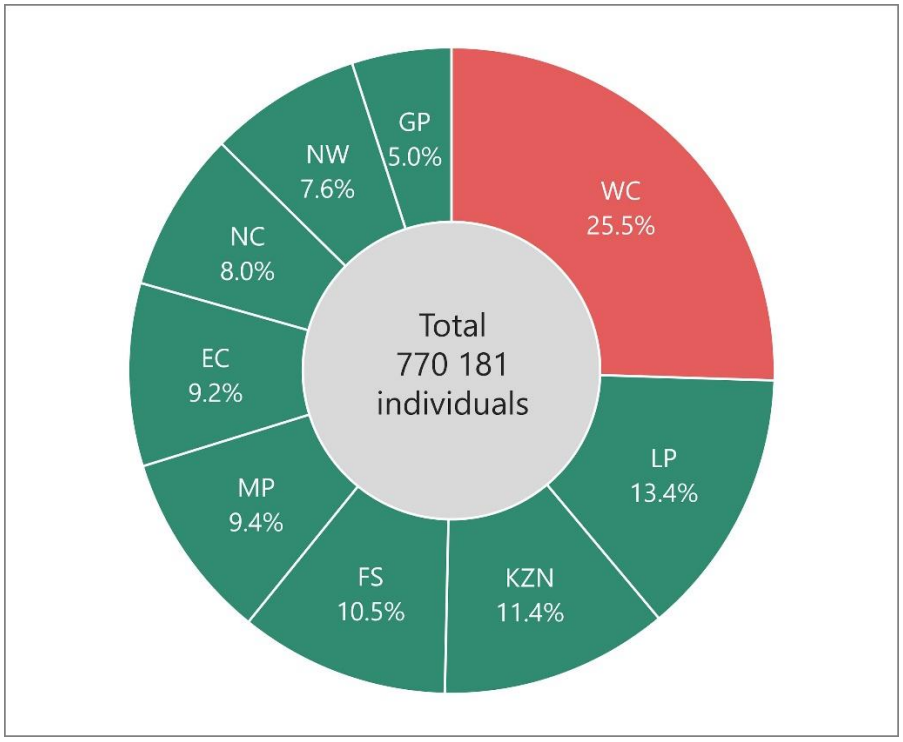


Figure 13.3: Provincial contribution to national employment in the commercial agricultural industry, 2023
Source: Stats SA, 2025

Limpopo was the second largest contributor to employment. This is not surprising in light of the fact that both Limpopo and Western Cape dominate national horticulture production. Horticulture is generally labour-intensive, and the activity accounts for 4 in every 10 jobs in the commercial agricultural industry. Nationwide, part-time employees accounted for 35% (269 974 individuals) and full-time employees 65% (500 207 individuals) of the workforce. Western Cape recorded contributions of 40% and 60% respectively. Farm workers dominate full-time employment both nationally and in the Western Cape (Figure 13.4). Managers, supervisors and administration staff make up a much smaller share.

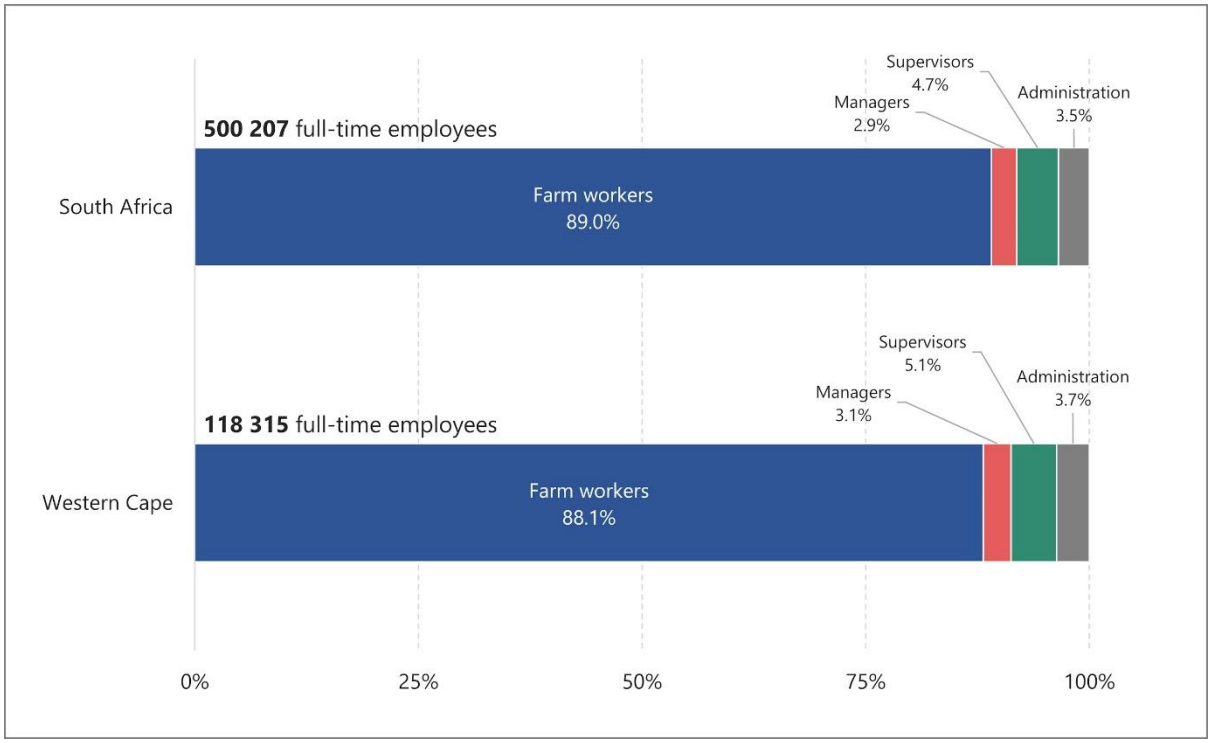


Figure 13.4: Percentage breakdown of full-time employees in the commercial agricultural industry, South Africa and Western Cape, 2023
Source: Stats SA, 2025

13.3 Production

Commercial agriculture in the Western Cape produced a large variety of fruits and field crops. The province was responsible for just over 1,1 million metric tons of apples and 0,9 million metric tons of wine grapes in 2023 (Figure 13.5). Other key products include wheat, pears and onions.

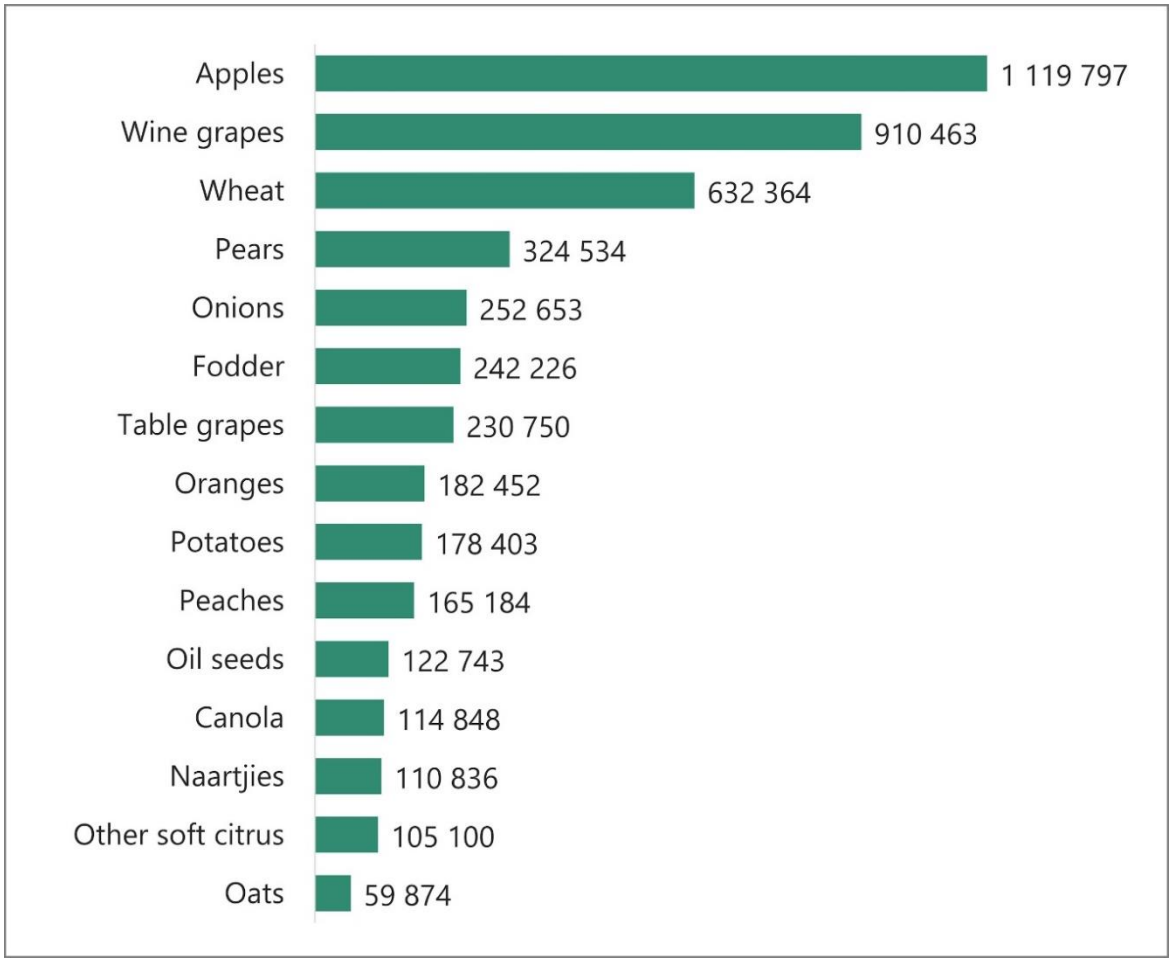


Figure 13.5: Top commercial agricultural products produced in Western Cape, 2023 (metric tons)
Source: Stats SA, 2025

In 2023, the province dominated the national supply of wine grapes, peaches, apples, canola, pears and table grapes (Figure 13.6). Western Cape is a leading force in the wine industry, producing almost the entirety (95,4%) of the nation's crop of wine grapes.

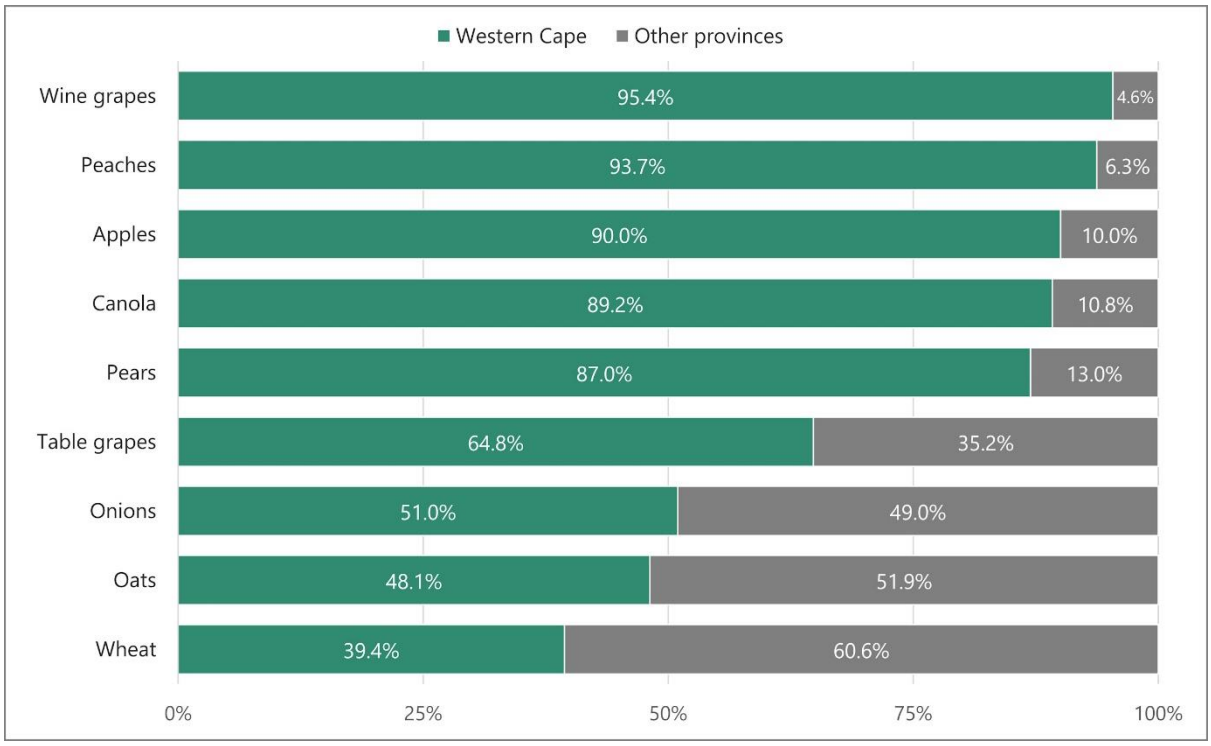


Figure 13.6: Selected commercial agricultural products: Percentage produced in Western Cape, 2023
Source: (Stats SA, 2025)

Summary Points

- Western Cape was responsible for 22% of national agricultural economic activity in 2023, making it the second largest contributor after KwaZulu-Natal.
- The province was the single largest generator of commercial agricultural income in 2023, followed by Free State and Gauteng.
- Horticulture generated just over half of gross farming income in the Western Cape.
- The province was the leading employer in commercial agriculture, accounting for just over a quarter of the national workforce.
- South Africa is heavily dependent on the Western Cape for the production of wine grapes, peaches, apples, canola and pears.

Conclusion 14

14. CONCLUSION AND RECOMMENDATIONS

The Western Cape agricultural sector continues to remain a vital part of the provincial and national economy, despite facing significant headwinds in 2024. The sector demonstrated resilience through its strong export performance, continued investment in high-value crops, and diversification into agri-tourism. However, challenges such as climate variability, infrastructure constraints, declining employment in agri-processing, and water scarcity underscore the need for adaptive strategies.

The decline in agricultural GVA signals the urgency for targeted interventions to sustain growth and competitiveness. The province's dominance in horticulture, wine grapes production, and agri-tourism presents opportunities for value addition, rural development, and job creation. Continued collaboration between government, industry, and research institutions will be essential to unlock these opportunities. In 2023, the national commercial agriculture sector generated R491.7 billion, and of that total, the Western Cape accounted for the largest share (20,6%), followed by Free State and Gauteng in the second and third place.

The trajectory of the provincial agriculture will need to be supported by :

- Increased investment driven to improve key infrastructure to enhance agricultural production in the regions and adaptation to climatic variabilities.
- Agri-tourism promotion to leverage the popularity of farm-based tourism to diversify income streams and promote rural development.
- Research and Development aimed at market access and competitive agricultural value chains contributing to efficiency gains.
- Prioritise maintaining existing export markets, grow their share and diversify to new markets.
- Unlocking of the agri-processing business opportunities and employment generation.

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