



- **Robust market growth:** Western Cape's agri-processing sector has grown by over 7.2% in terms of its GVA between 2019 - 2024, aligning with forecasted global annualised growth rate of 7.5% between 2024-2031.
- **Top Global Wine Producer:** South Africa ranks in the top 10 global destinations for the production of traditional wine. The major wine regions of SA are situated in the Western Cape, most notably the Cape Winelands, which has nearly 14,300 hectares dedicated to wine grape vineyards.
- **Speed to Market Edge:** The Western Cape's shipping of goods to the European region takes roughly 22 days, faster than Chile's Valparaíso corridor (≈25 days) and Australia's (≈42 days), keeping fruit firmer and reducing cold-chain cost, a very important feature of the Western Cape's thriving citrus export market.



WESTERN CAPE **AGRI-PROCESSING** INVESTOR OPPORTUNITY FACTSHEET

OUR UNIQUE SELLING POINTS

1

Established Global Sustainable Fishing Brand:

Western Cape dominates South Africa's fishing exports, accounting for approximately 68% of the national total and growing at a CAGR of 7.7% between 2020 and 2024. The province is home to South Africa's deep-sea hake trawl fishery — the first in Africa and globally recognised as the world's first MSC-certified hake fishery. Western Cape waters are also home to the prized West Coast rock lobster, a native delicacy revered globally as a high-value luxury export.

3

Agri-focused Education Excellence: Stellenbosch University leads South Africa's tertiary institutions in agriculture & forestry graduates, and is a top 100 university globally, ranking 3rd in Africa, for overall academic excellence. It is also the only university which offers a degree in viticulture and oenology, and it has many of the country's most successful winemakers as alumni.

2

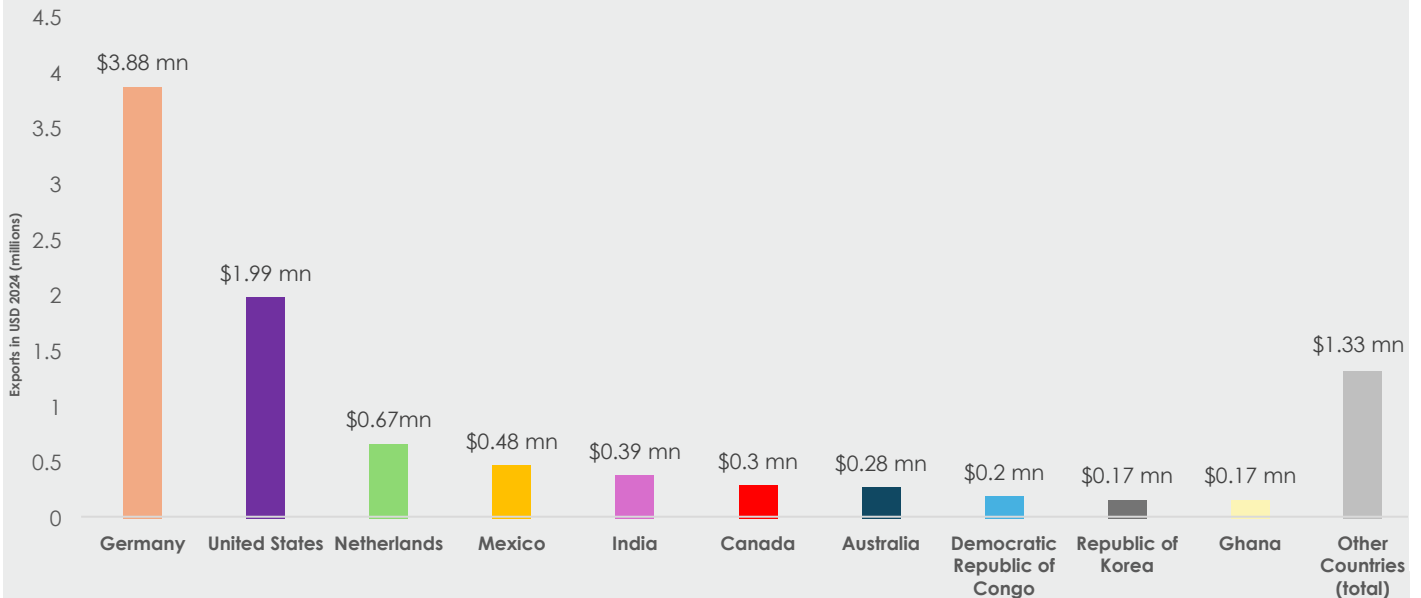
Climate Advantage and Advanced Trade

Infrastructure: Western Cape's unique climate enables year-round food production, ensuring reliable exports as global demand grows 60% by 2050. Deepwater ports in Saldanha and Cape Town, with modern cold chain infrastructure, deliver fresh produce to Europe in under three weeks, minimising spoilage. Cape Town Intl. airport supports rising air cargo for high-value, time-sensitive goods. Local firms also benefit from zero-duty trade to 46 African states, cutting regional shipping costs by up to 15%.

4

Indigenous Botanicals Premium: Rooibos (the first African food with EU PDO status) ships 9 700 tons a year to 50+ markets, Honeybush already exports 200+ tons annually and is advancing its own Geographical Indication (GI) registration, while Buchu's aromatic leaf oils power high-margin nutraceutical sales, especially among European countries.

WESTERN CAPE AGRI-PROCESSING EXPORT MARKET DESTINATIONS, 2024



WHY INVEST IN THE WESTERN CAPE?

- **Phytosanitary Gold Standard:**

Western Cape boasts world-class Sanitary and Phytosanitary controls, enabling fruit & meat exports to strict markets like EU, China, and USA.

- **Home-market Dominance:**

The region

ships 85% of all South African fish, crustacean and mollusk exports and an impressive 51% of the country's total agricultural exports.

- **Innovation and Smart Farming Hub:**

Western Cape is at the forefront of smart farming and precision agriculture,

for example, Ceres Fruit Growers uses new digital packing lines to boost productivity and sustainability, grading 80 fruits per second with real-time data.

- **Cost-Competitive Environment:**

WC provides strong returns due to its cost-competitive environment, driven by skilled, lower-cost labor and reliable logistics, ensuring a significant financial advantage.

WHERE TO INVEST IN THE WESTERN CAPE

- **Investment Locations:** Key Clusters for Opportunity: established and emerging clusters such as Cape Town Central, Grabouw, Paarl, Wellington, Stellenbosch, Bonnievale, and Citrusdal. These areas offer strategic access to raw materials, logistics networks, and skilled labour.
- **The Port of Cape Town** serves as a vital gateway for South African agricultural exports, handling over half of the agribusiness outflows.
- **The Western Cape leads Africa's halaal agri-processing industry**, presenting lucrative opportunities in halaal-certified meat, dairy, ready-to-eat meals, and confectionery.

KEY INDUSTRY OPERATORS IN THE WESTERN CAPE



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