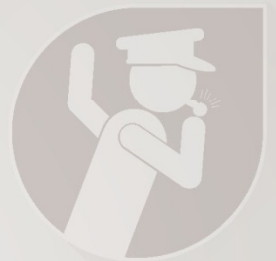




Western Cape
Government



Cederberg Municipality

2019



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Cederberg: At a Glance

Demographics

Population Estimates, 2018; Actual households, 2016



Population

59 432



Households

15 279

Education

2018



Matric Pass Rate 84.1%

Learner retention rate 66.7%

Learner-Teacher Ratio 26.8

Poverty

2018



Gini Coefficient 0.585

Human Development Index 0.66

Health

2017/18



Primary Health
Care Facilities

11

Immunisation
Rate

75.7%

Maternal Mortality Ratio
(per 100 000 live births)

0.0

Teenage Pregnancies -
Delivery rate to women U/18

19.3%

Safety and Security

Actual number of reported cases in 2018/19



Residential Burglaries

218

DUI

58

Drug-related Crimes

861

Murder

27

Sexual Offences

76

Access to Basic Service Delivery

Percentage of households with access to basic services, 2016



Water

94.9%

Refuse Removal

68.6%



Electricity

88.4%



Sanitation

92.3%



Housing

78.1%



Road Safety

2017

Road User Fatalities 29

Labour

2018

Unemployment Rate
(narrow definition)

7.1%



Socio-economic Risks

Risk 1 Increased inequality

Risk 2 Access to Basic Services

Risk 3 Deteriorating education outcomes

Largest 3 Sectors

Contribution to GDP, 2017

Agriculture, forestry and fishing

23.8%

Manufacturing

20.8%

Wholesale & retail trade,
catering & accommodation

13.5%

1

DEMOGRAPHICS

Accurate and reliable population data lies at the heart of the municipal budget and planning process as it is the primary variable informing the demand for basic services and the subsequent allocation of resources. Changes in population figures can mostly be attributed to three broad demographic processes namely, fertility, mortality and migration rates.

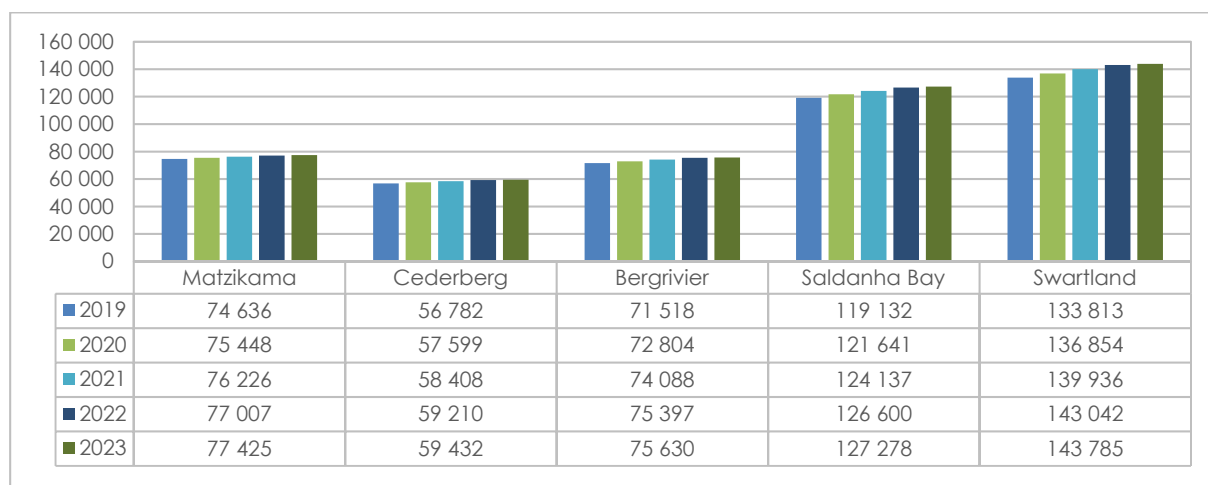
This chapter provides a concise yet meaningful overview of key demographic variables that will assist with municipal planning and budgeting, namely estimates of population size, a sex ratio analysis, the distribution of population projections within age cohorts, dependency ratios, the number of households and household size compositions as well as an overview of population density per local municipal area.

The demographic data provided in this Chapter was sourced from the Department of Social Development who used Stats SA's 2018 Mid-Year Population Estimates (2002 - 2030) to project population growth for the period 2019 to 2025.

Data source: Department of Social Development, 2019



POPULATION



Cederberg currently has a population of 56 782, rendering it the least populated municipal area in the West Coast District (WCD). The total population is estimated to increase to 59 432 by 2024 which equates to a 4.6 per cent year-on-year growth rate. The estimated population growth rate of Cederberg is therefore notably above the estimated population growth of the WCD of 1.5 per cent.

West Coast District: Sex Ratio (SR), 2019 – 2023					
Municipality	2019	2020	2021	2022	2023
Matzikama	100.6	100.8	101.1	101.2	101.8
Cederberg	101.3	101.5	101.8	101.8	101.9
Bergrivier	92.9	92.7	92.6	92.5	92.0
Saldanha Bay	98.3	98.5	98.6	98.6	98.5
Swartland	98.5	98.6	98.7	98.6	98.5
West Coast District	98.2	98.3	98.4	98.4	98.4

The overall sex ratio (SR) depicts the number of males per 100 females in the population (Moultrie et al., 2013: 9). As per above table, there are in general more males than females in Cederberg. The SR for Cederberg does however remains relatively constant towards 2023 which can be attributed to a wide range of factors such as a decrease in male mortality rates and the potential inflow of working males. The variance in life expectancy between males and females can in turn also be attributed to a variety of social and behavioural dynamics (Stats SA, 2018: 23). There are in general more males than females in Matzikama while the surrounding municipalities display more females than males.

Cederberg: Age Cohorts, 2019 – 2025				
Year	Children 0 – 14 Years	Working Age 6 – 65 Years	Aged 65+	Dependency Ratio
2019	16 174	37 986	2 622	49.5
2022	16 707	39 715	2 789	49.1
2025	17 218	40 859	2 895	49.2
Growth	1.0%	1.2%	1.7%	-

The above table depicts Cederberg's population composition per age cohorts. These groupings are also expressed as a dependency ratio which in turn indicates who are part of the workforce (Age 15 - 64) and those, who are depending on them (children and seniors). A higher dependency ratio means a higher pressure on social systems and the delivery of basic services.

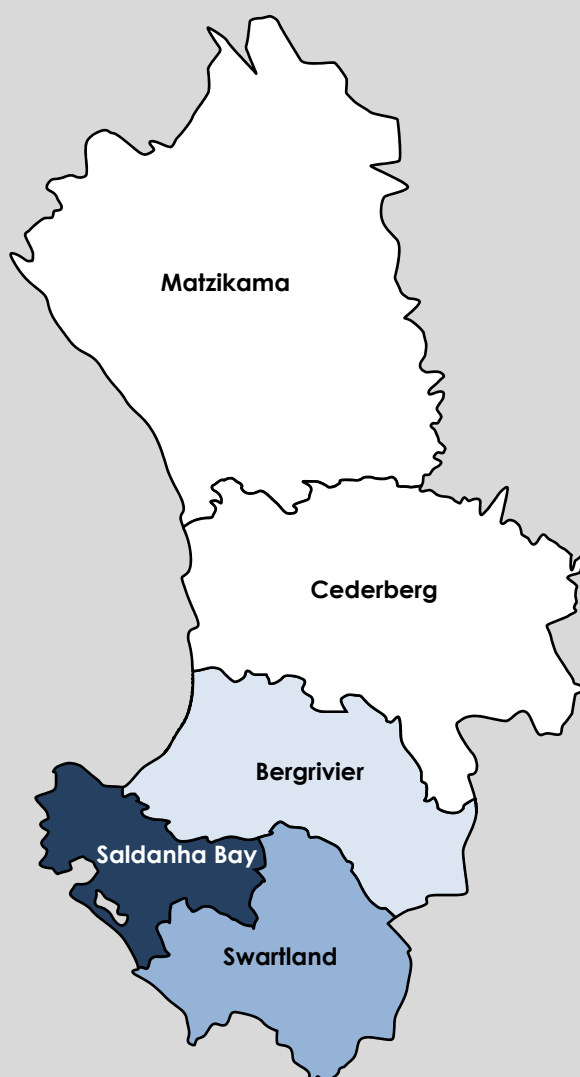
Between 2019 and 2025, the largest population growth was recorded in the aged cohort which grew at an annual average rate of 1.7 per cent. The child and working age cohorts in turn only grew by 1.0 and 1.2 per cent respectively. The dependency ratio remains stable at approximately 49.0 per cent over the reporting period.

HOUSEHOLDS SIZE

Cederberg: Household size, 2019 – 2023				
2019	2020	2021	2022	2023
3.8	3.8	3.7	3.7	3.7

Household size refers to the number of people per household. It is worth noting that while the number of households in the Cederberg municipal area is increasing at 1.8 per cent, the actual size of households is dropping to 3.7 in 2021 but remain stable at that level thereafter. This potentially implies an inflow of young professionals (either single, as couples or with small family groupings) into the area as a result of enhanced urbanisation. Other contributing factors include, but are not limited to, lower/higher fertility rates, occurrences of divorce, ageing population, etc.

POPULATION DENSITY



Colour Code	Population per km ²
	0 – 10
	11 – 20
	21 – 30
	31 – 40
	41 – 50
	50+

Amidst rapid urbanisation across the Western Cape, population density figures will aid public sector decision makers to mitigate environmental, individual health and service delivery risks.

In 2019, the population density of the West Coast District (WCD) was 15 persons per square kilometre. In order of highest to lowest, the various local municipal areas in the WCD compare as follows:

- Saldanha Bay 59 people/km²
- Swartland 36 people/km²
- Bergrivier 16 people/km²
- **Cederberg 7 people/km²**
- Matzikama 6 people/km²

2

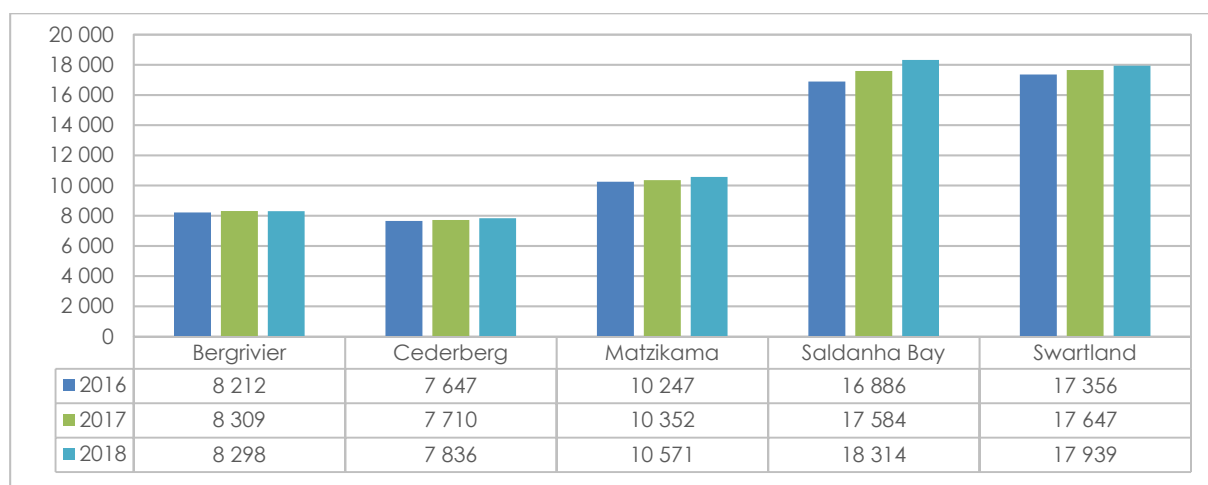
EDUCATION

The quality of education is closely correlated with economic development and social cohesion. Dramatically improving our education outcomes is an imperative not just to achieve the economic growth rates that South Africa needs to end poverty and increase inclusion, but also to tackle social ills such as crime and substance abuse.

Data source: Western Cape Education Department, 2019



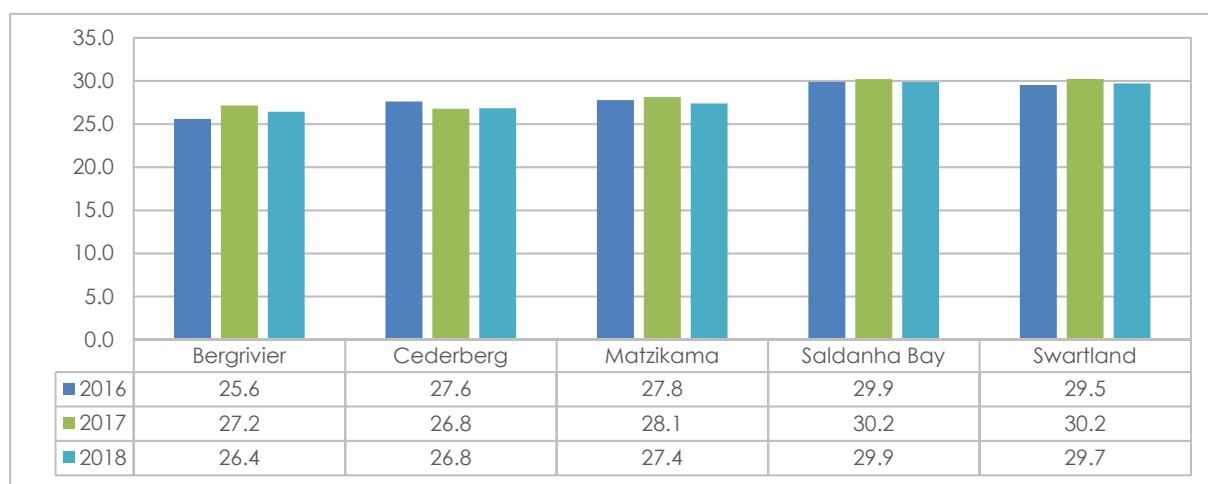
LEARNER ENROLMENT



Learner enrolment in Cederberg increased by 2.4 per cent for the period 2016 to 2018 (from 7 647 to 7 836), the lowest in the district when compared to the other municipal areas. This could be attributed to a number of factors including in-migration and birth rates. Economic connectivity to surrounding areas and perceived economic opportunities may be additional factors relating to the surge in learner enrolment.

LEARNER-TEACHER RATIO

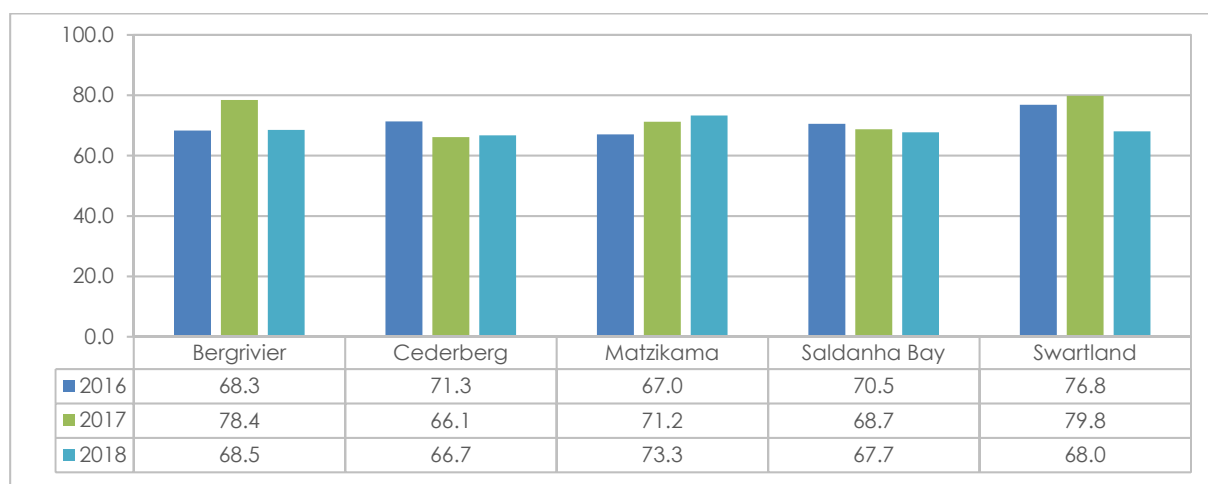
Factors influencing the learner-teacher ratio is the ability of schools to employ more educators when needed and the ability to collect fees.



The learner-teacher ratio in Cederberg decreased from 27.61 learners in 2016 to 26.77 learners in 2017 but increased marginally to 26.84 learners in 2018, which could in future affect learner performance positively within the Cederberg municipal area. Cederberg recorded the second lowest learner-teacher ratio after Bergrivier (26.43 in 2018) in the WCD area.

LEARNER RETENTION

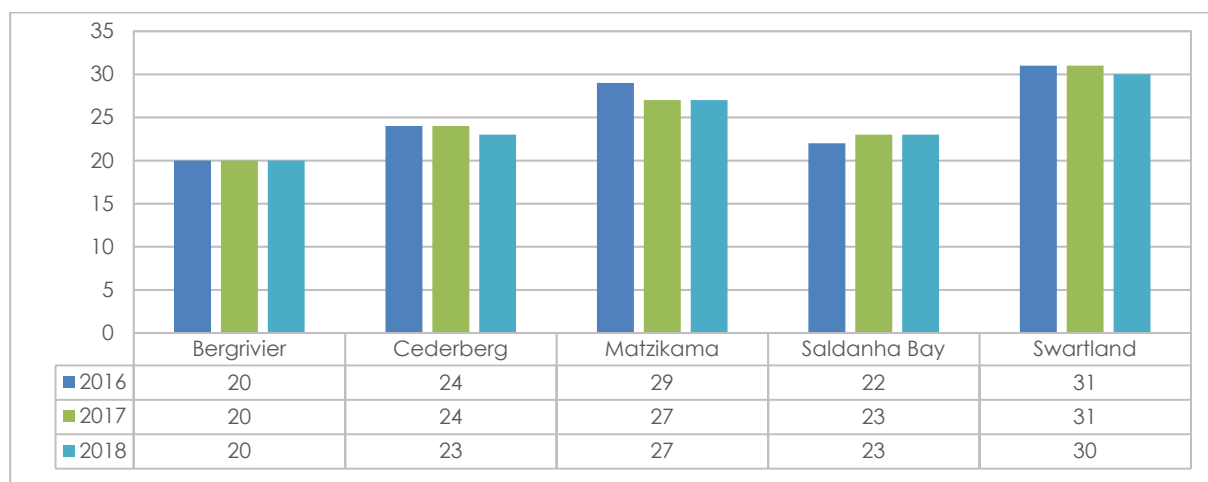
The learner retention rate is influenced by a wide array of factors, including economic influences such as unemployment, poverty/very low household income/indigent households, as well as social concerns such as teenage pregnancies. Being able to retain learners is essential for positive education outcomes and as such when considering education outcomes/results, retention rates should be kept in mind.



The Cederberg retention rate has regressed year-on year from 71.3 per cent in 2016 to 66.7 per cent in 2018. Worryingly, Cederberg has exhibited the lowest retention rate in the District, as the economy is under strain coupled with the modest investment currently setting upon the region, the retention rates becomes an important proxy for future labour trends and employment outlook in years to come.

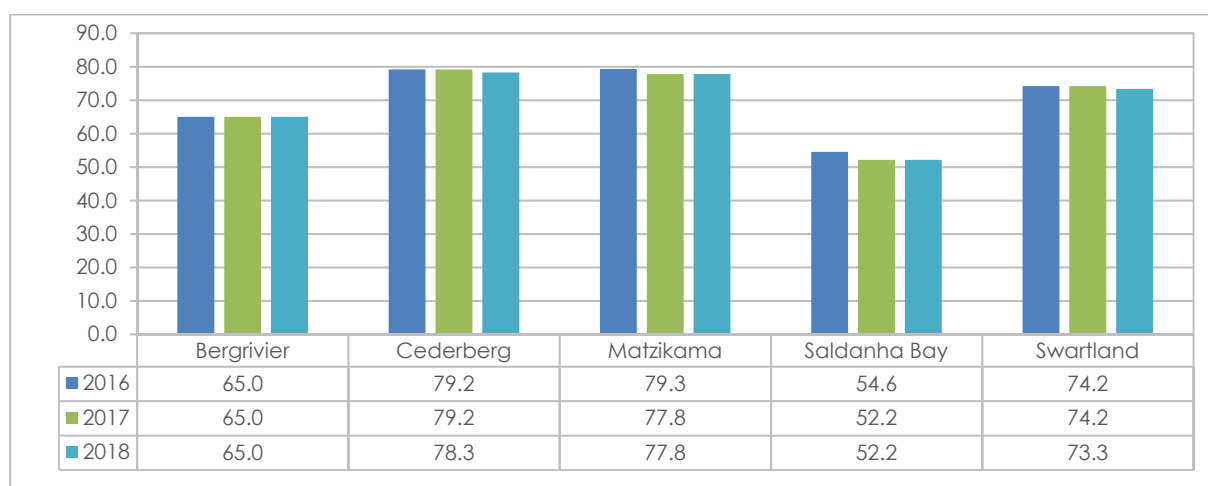
EDUCATIONAL FACILITIES

The increased availability of adequate education facilities such as schools, Further Education and Training (FET) colleges and schools equipped with libraries/media centres could positively affect academic outcomes.



In 2018, Cederberg had a total of 23 public ordinary schools, one less than in 2017. The number of schools in relation to the learner enrolment relative to the other areas in the district may accentuate the need for additional schools in the Cederberg area. Given the tough economic climate and associated drop in disposable income, schools have been reporting an increase in parents being unable to pay their school fees.

NO-FEE SCHOOLS



The proportion of no-fee schools remained relatively unchanged from 79.17 per cent in 2016 to 78.26 per cent in 2018. This could in future further increase the drop-out rate. Notably, Cederberg has the highest proportion of no-fee schools across the WCD region in 2018.

SCHOOLS WITH LIBRARIES

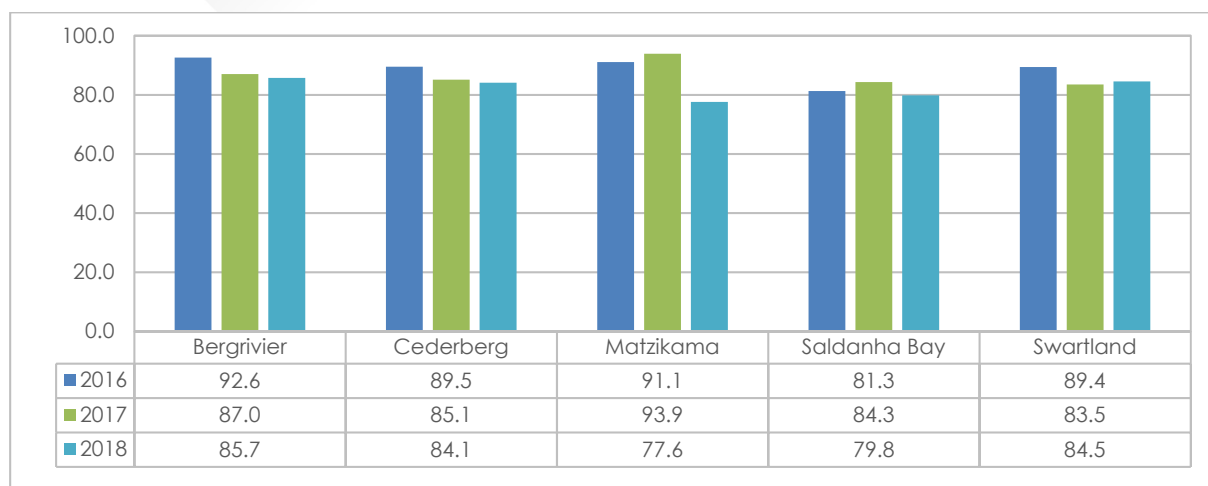


The number of schools equipped with libraries increased from 8 in 2016 to 9 in 2018 which could affect the overall educational outcomes within the Cederberg area. Cederberg has the lowest number of libraries within the District, which translates to a coverage of nearly 40 per cent of the schools within the Cederberg area.

EDUCATION OUTCOMES



Education remains one of the key avenues through which the State is involved in the economy. In preparing individuals for future participation in the broader market, policy decisions and choices in the education sector play a critical role in determining the extent to which future economic growth and poverty reduction plans can be realised. This section measures the matric pass rate within the Cederberg municipal area.



The matric pass rate in Cederberg regressed from 89.5 per cent in 2016 to 84.1 per cent in 2018. This follows a sharp fall in 2017 with a pass rate of 85.1 per cent. This particular statistic is vital as it could improve access for learners to higher education to broaden their opportunities.

3

HEALTH

Health is another major factor contributing to the general quality of life in the Cederberg municipal area. It is therefore important to monitor the public health facilities as well as a variety of factors such as Human Immunodeficiency Virus (HIV)/Acquired Immunodeficiency Syndrome (AIDS) or Tuberculosis (TB) and general topics that affect the community, like maternal health. This Socio-economic Profile provides the basic statistics concerning these issues. Since this profile focusses on the public health facilities, private facilities are not included.

Data source: Department of Health, 2019



HEALTHCARE FACILITIES

All citizens' right to access to healthcare services are directly affected by the number and spread of facilities within their geographical reach. South Africa's healthcare system is geared in such a way that people have to move from primary, with a referral system, to secondary and tertiary levels.

Area	PHC Clinics		Community Health Centres	Community Day Centres	Hospitals		Treatment Sites	
	Fixed	Non-fixed			District	Regional	ART Clinics	TB Clinics
Cederberg	6	5	0	0	2	0	5	11
West Coast District	25	37	0	1	7	0	43	75

In terms of healthcare facilities, Cederberg had 11 primary healthcare clinics (PHC) in 2018, which comprises of 6 fixed and 5 mobile clinics. In addition, there are 2 district hospitals, as well as 5 Antiretroviral treatment clinics/sites and 11 Tuberculosis clinics/sites. There are no community health or community day centres in Cederberg.

EMERGENCY MEDICAL SERVICES



Access to emergency medical services is critical for rural citizens due to distances between towns and health facilities being much greater than in the urban areas. Combined with the relatively lower population per square kilometre in rural areas, ambulance coverage is greater in rural areas to maintain adequate coverage for rural communities.

Cederberg has 2 ambulances per 10 000 inhabitants in 2018 which is on par with the district average of 2 ambulances per 10 000 people. It is worth noting that this number only refers to Provincial ambulances and excludes all private service providers.

HIV/AIDS

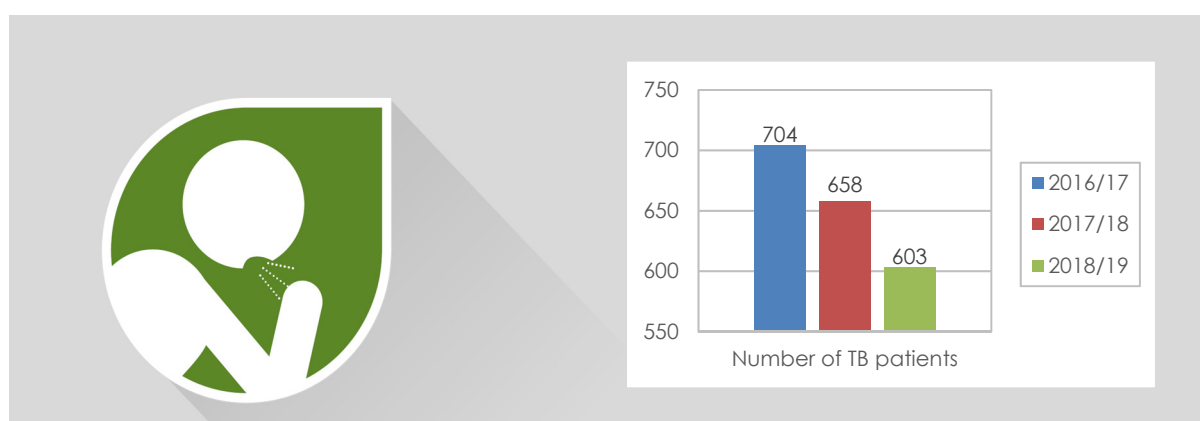
HIV/AIDS is among the top ten causes of death in the western Cape Province accounting for 8 per cent in 2016. HIV/AIDS management is crucial given its implications for the labour force and the demand for healthcare services.

Access to Antiretroviral treatment extends the lifespan of many in South Africans, who would have otherwise died prematurely. According to the Western Cape Department of Health there were eight ART clinics/treatment sites in 2018.

Area	Registered patients receiving ART		Number of new ART patients	
	2017	2018	2017	2018
Cederberg	2 064	2 438	420	452
West Coast District	10 202	11 255	2 125	2 118

Cederberg's total registered patients receiving ARTs is steadily rising between 2017 and 2018 (increase of 374 patients). In addition, the number of new antiretroviral patients increased to 452 in 2018 from 420 in 2017. A total of 11 255 registered patients received antiretroviral treatment in the WCD in 2018 compared to 10 202 registered patients in 2017. Cederberg, at 2 438 patients, represent 21.7 per cent of the patients receiving ART in the WCD. This could be an indication that the prevalence of HIV is increasing or an indication that more people are being tested and receiving access to HIV treatment.

TUBERCULOSIS (TB)



Cederberg experienced a decline in tuberculosis (TB) cases in 2018, with 658 TB patients in 2017 compared to 603 in 2018, this represents a 8.4 per cent contraction over the three-year period. The TB patients are treated in 11 TB clinics or treatment sites within the Cederberg Municipality.

CHILD HEALTH

The United Nations Sustainable Development Goals aims by 2030 to end preventable deaths of new-borns and children under 5 years of age, with all countries aiming to reduce neonatal mortality to at least as low as 12 per 1 000 live births and under-5 mortalities to at least as low as 25 per 1,000 live births (Source: UN SDG's).

Area	Immunisation Rate under 1		Acute Malnutrition-child under 5		Neonatal Mortality Rate		Low birth weight	
	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18	2016/17	2017/18
Cederberg	66.4	75.7	3.1	2.3	10.4	11.2	17.4	16.3
West Coast District	54.3	59.1	1.7	2.1	9.2	6.4	13.4	13.8

Immunisation rates in the Cederberg area are generally low although the rate has improved from 66.4 per cent in 2017 to 75.7 per cent in 2018.

The **number of malnourished children** under five years (per 100 000) in Cederberg in 2017 was 3.1 which improved to 2.3 in 2018.

Neonatal mortality rate (NMR) (per 1 000 live births) in the Cederberg area has regressed from 10.4 in 2017 to 11.2 in 2018. An improvement in the NMR may indicate progression in new-born health outcomes, or it may indicate an improvement in the reporting of neonatal deaths.

The **low birth weight** indicator improved from 17.4 per cent in 2017 to 16.3 per cent in 2018.

DEFINITIONS

Immunisation: The immunisation rate is calculated as the number of children immunised as a percentage of the total number of children less than one year of age. Immunisation protects both adults and children against preventable infectious diseases. Low immunisation rates speak to the need for parents to understand the critical importance of immunisation, as well as the need to encourage parents to have their young children immunised.

Malnutrition: Expressed as the number of malnourished children under five years per 100 000 people. Malnutrition (either under- or over-nutrition) refers to the condition whereby an individual does not receive adequate amounts or receives excessive amounts of nutrients.

Neonatal mortality rate: Measured as the number of neonates dying before reaching 28 days of age, per 1 000 live births in a given year. The first 28 days of life (neonatal period) represent the most vulnerable time for a child's survival. The Province's target for 2019 is 6.0 per 1 000 live births.

Low birth weight: Percentage of all babies born in facility that weighed less than 2 500 g. Low birth weight is associated with a range of both short- and long-term consequences.

MATERNAL HEALTH

Area	Maternal Mortality Rate		Delivery Rate to Women under 20 years		Termination of Pregnancy Rate	
	2017	2018	2017	2018	2017	2018
Cederberg	0	0	18.2	19.3	0.4	0.4
West Coast District	25	71	16.6	16.2	0.4	0.4

The **maternal mortality rate** in the Cederberg area is zero deaths per 100 000 live births in 2017.

The **delivery rate to women under 20 years** has increased marginally between 2017 and 2018 in Cederberg, from 18.2 to 19.3 per cent; and dropped marginally across the WCD, from 16.6 to 16.2 per cent.

The **termination of pregnancy rate** remained constant at 0.4 per cent for 2018 which is on par with the District rate of 0.4 per cent for the same period.

DEFINITIONS

Maternal mortality rate: *Maternal deaths per 100 000 live births in health facilities. Maternal death is death occurring during pregnancy, childbirth and the puerperium of a woman while pregnant or within 42 days of termination of pregnancy, irrespective of the duration and site of pregnancy and irrespective of the cause of death (obstetric and non-obstetric).*

Births to teenage mothers: *Deliveries to women under the age of 20 years as proportion of total deliveries in health facilities. Teenage pregnancy is almost always unplanned; as a result, when young parents are placed in a position to care for their children, life can become particularly tough, especially if they do not have family or social support.*

Termination of pregnancy: *The percentage of terminations as a proportion of the female population aged 15 to 44 years. Government hospitals, designated private doctors and gynaecologists, and non-profit providers offer safe and legal termination of pregnancy. To have a free abortion, the request must be made at a primary healthcare clinic, where the pregnancy will be confirmed, counselling provided, an appointment made, and a referral letter be given to a facility where the procedure can be performed.*

4

POVERTY

This section shows living conditions and economic circumstances of households in the Cederberg municipal area based on most recent data including Global Insight and Quantec. Economic theory suggests that when an economy prospers its households are expected to enjoy an improved standard of living. On the contrary, a declining economy tends to lower the standards of living of people. This section uses indicators in terms of GDP per capita, income inequality and the human development index to show the current reality of households residing in the Cederberg municipal area.

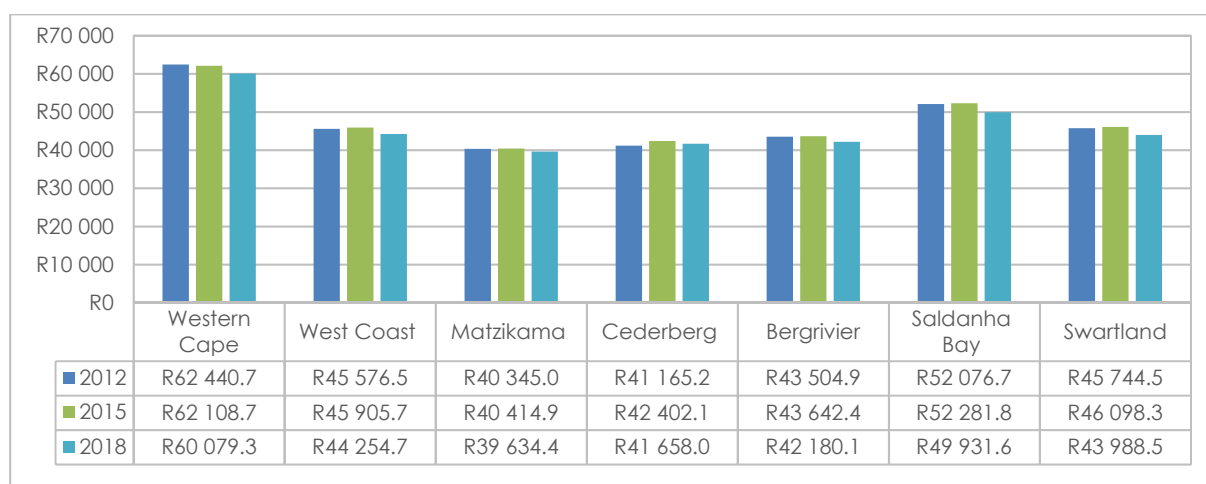
The deteriorating financial health of households and individuals under the weight of economic pressures, specifically between 2011 and 2015, has resulted in an increase in the poverty levels, according to the Poverty Trends in South Africa report released by Statistics South Africa in 2017. The report cites rising unemployment levels, low commodity prices, higher consumer prices, lower investment levels, household dependency on credit, and policy uncertainty as the key contributors to the economic decline in recent times. These recent findings indicate that the country will have to reduce poverty at a faster rate than previously planned.

According to the report the categories of people vulnerable to poverty remained to be African females, children 17 years and younger, people from rural areas, and those with no education. Inflation-adjusted poverty lines show that food poverty increased from R219 in 2006 to R531 per person per month in 2017. The lower-bound poverty line has increased from R370 in 2006 to R758 per person per month in 2017 while the upper-bound poverty line has increased from R575 in 2006 to R1 138 per person per month in 2017.



GDPR PER CAPITA

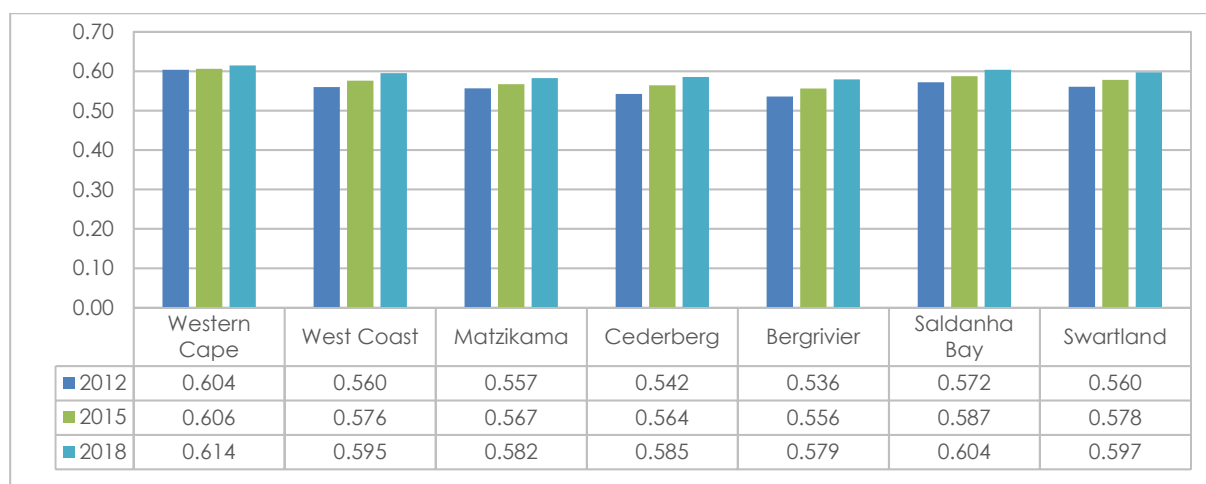
An increase in real GDPR per capita, i.e. GDPR per person, is experienced only if the real economic growth rate exceeds the population growth rate. Even though real GDP per capita reflects changes in the overall well-being of the population, not everyone within an economy will earn the same amount of money as estimated by the real GDPR per capita indicator.



At R41 658 in 2018, Cederberg's real GDPR per capita is notably below that of the WCD's figure of R44 254 as well as that of the Western Cape (R60 079.3). In relation to neighbouring municipalities, Cederberg along with Matzikama (R39 634.4) represent the lowest per capita figures for the region and as such present the "poverty pockets" which is a strong characteristic of rural economies and hence rural specific strategies targeting uplifting these communities should be of utmost importance.

INCOME INEQUALITY

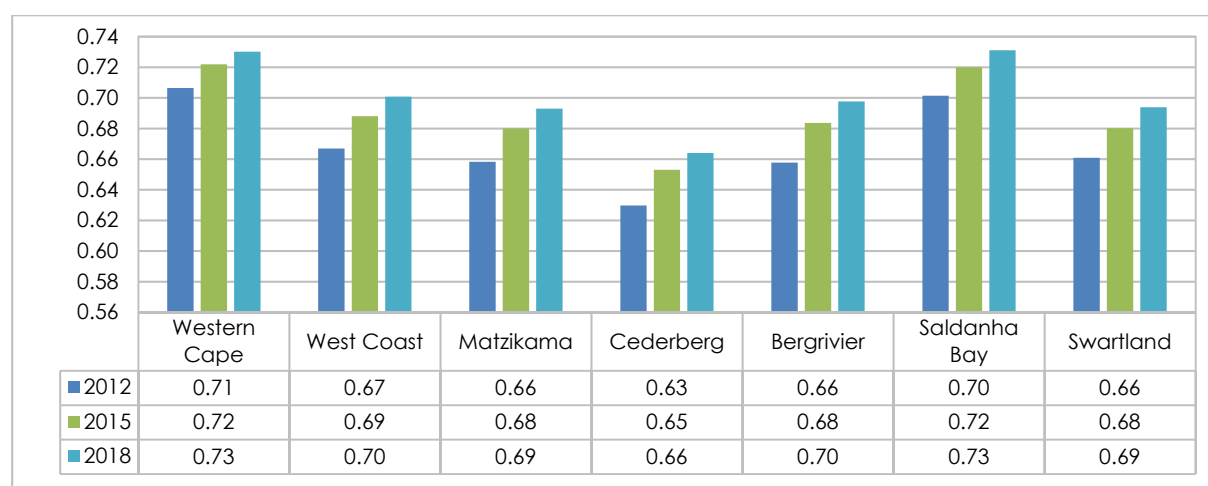
The National Development Plan (NDP) has set a target of reducing income inequality in South Africa from a Gini coefficient of 0.7 in 2010 to 0.6 by 2030. Income inequality has increased in Saldanha Bay between 2012 and 2018 with the exception of 2011, when it dropped below 0.55.



Furthermore, income inequality levels were marginally higher in Cederberg for 2018 with a Gini coefficient of 0.58 but lower compared to Swartland and Saldanha municipalities and the broader WCD and the Western Cape. These rather worrying disparities in income are certain to worsen across the ensuing MTREF given the expected in-migration of job seekers who are often low-skilled and assume seasonal employment (low income) within Agriculture. This in itself presents a problem for the income inequality burden.

HUMAN DEVELOPMENT

The United Nations uses the Human Development Index (HDI)¹ to assess the relative level of socio-economic development in countries. Indicators that measure human development are education, housing, access to basic services and health. Per capita income is the average income. It is income per head of the population per year. Per Capita Income might not be the income of every individual in the State. Life expectancy and Infant Mortality Rate are other important criteria for measuring development.



There has been a general increase in the HDI in Cederberg from 0.63 in 2012 to 0.66 in 2018. The trend for the WCD and the Western Cape in general has been similar between 2012 and 2018. Despite the increase, Cederberg's HDI remained the lowest within the WCD.

¹ The HDI is a composite indicator reflecting education levels, health, and income. It is a measure of peoples' ability to live a long and healthy life, to communicate, participate in the community and to have sufficient means to be able to afford a decent living. The HDI is represented by a number between 0 and 1, where 1 indicates a high level of human development and 0 represents no human development.

5

BASIC SERVICE DELIVERY

The Constitution of the Republic of South Africa states that every citizen has the right to access adequate housing and that the State must take reasonable legislative and other measures within its available resources to achieve the progressive realisation of this right. Access to housing also includes access to services such as potable water, basic sanitation, safe energy sources and refuse removal services, to ensure that households enjoy a decent standard of living.

This section uses Statistics South Africa's Community Survey 2016, Statistics South Africa's Non-Financial Census of Municipalities (2015 to 2018) as well as information by Quantec Research to reflect on the most recent household information and service trends.



ACCESS TO HOUSING AND HOUSEHOLD SERVICES

Since no new household survey information is available, this section highlights housing and household services access levels from the most recent available information from Statistics South Africa's Community Survey 2016. The next household survey which includes municipal level access to household services will be the Census in 2021.

Community Survey 2016	Cederberg	West Coast District
Total number of households	15 279	129 862
Formal main dwelling	11 936 78.1%	111 389 85.5%
Water (piped inside dwelling/within 200 m)	14 499 94.9%	125 336 96.5%
Electricity (primary source of lighting)	13 511 88.4%	120 155 96.5%
Sanitation (flush/chemical toilet)	14 100 92.3%	122 205 94.1%
Refuse removal (at least weekly)	10 488 68.6%	108 311 83.4%

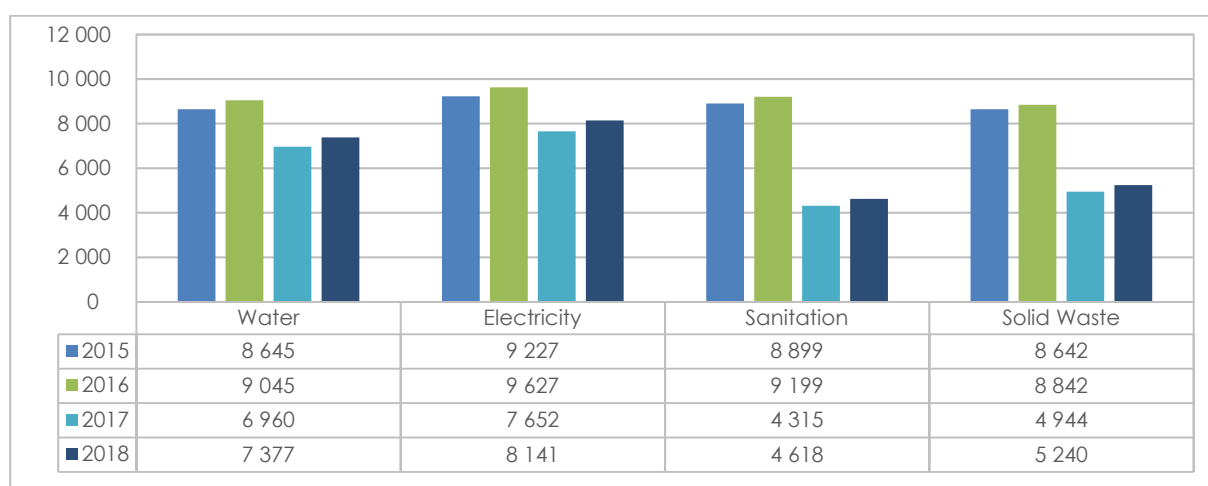
Access to housing and services were notably lower than the District, at 94.9 per cent for water, 92.3 per cent for sanitation, 68.6 per cent refuse removal and 88.4 per cent for electricity. The proportion of households with access to water at 94.9 per cent was also marginally lower than that of the District.

Dwelling Type	West Coast District	%	Cederberg	%
House or brick structure on a separate stand or yard	95 324	79.8	12 927	80.5
Traditional dwelling/hut/structure made of traditional materials	722	0.6	145	0.9
Flat in a block of flats	2 207	1.8	307	1.9
Town/cluster/semi-detached house (simplex, duplex or triplex)	5 111	4.3	578	3.6
House/flat/room, in backyard	1 609	1.3	153	1.0
Informal dwelling/shack	12 154	10.2	1 700	10.6
Room/flatlet not in backyard but on a shared property	858	0.7	67	0.4
Other/unspecified/NA	1 457	1.2	189	1.2
TOTAL	119 443	100.0	16 067	100.0

In the WCD, 79.8 per cent of households reside in a house or brick structure on a separate stand or yard. The Cederberg municipal area has the second lowest proportion of the households in the District which reside in dwellings of this type – at 80.4 per cent. In the WCD, 10.2 per cent of households reside in informal dwellings, with the Cederberg municipal area accounting for a similar proportion of households living in informal dwellings, at 10.5 per cent.

CONSUMER UNITS

A key element to the sustainable management of services is accurate and reliable information on the demand for services, including free basic services, to enable informed projections on future demand. This section reflects on services growth based on information from Statistics South Africa's Non-Financial Survey of Municipalities. The unit of measure is a consumer/billing unit which is not comparable to household level information. Services provided by municipalities are done per 'plot' or consumer/billing unit, however, since households are the unit of measurement more often used in demographic surveys, an understanding of household dynamics remains important.



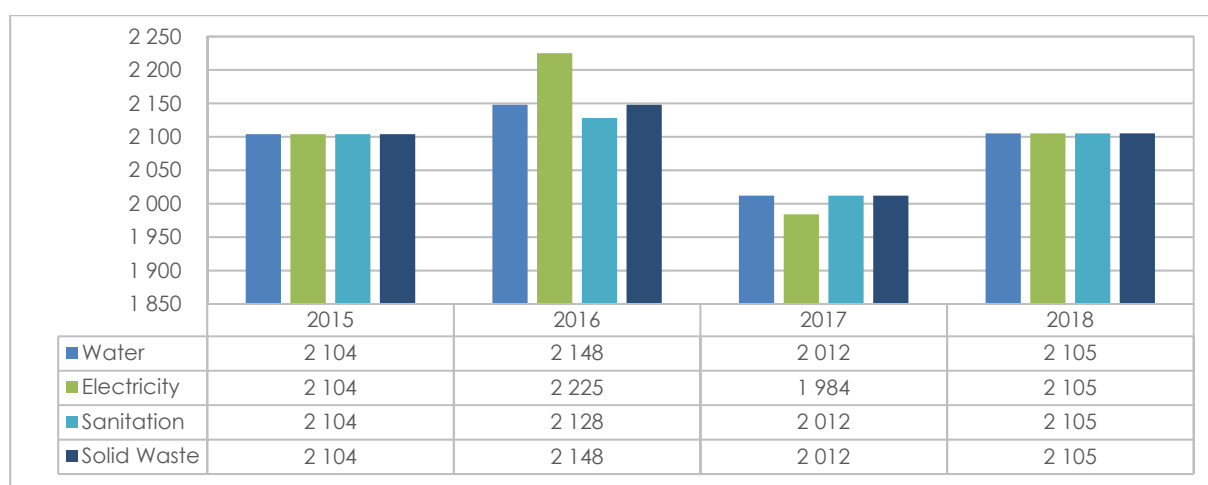
Between 2015 and 2018, the number of consumer units has contracted across all services. In 2018, Electricity services represented the largest number of consumer units at 8 141; this is followed closely by water at 7 377. Sanitation services had the lowest number of consumer units at 4 618, with solid waste coming in at 5 240.

Access to all levels of services contracted considerably between 2015 and 2018. The largest contraction was recorded for access to sanitation services, where 4 281 less consumer units had been consumed compared to 2015. Access to solid waste removal services also decreased substantially by 3 402 consumer units, while access levels decreased by 1 268 and 1 086 consumer units in relation to water services and electricity respectively.

FREE BASIC SERVICES

As per the Constitution, it is the responsibility of the local sphere of government to provide services that satisfy the basic needs of its citizens. The Municipal Systems Act in turn defines a basic municipal services as those necessary to ensure an acceptable and reasonable quality of life and, if not provided, would endanger public health or safety or the environment. Such basic services include, but are not limited to the provision of water, sewage collection and disposal, refuse removal, municipal health services, street lighting, parks and recreation facilities etc.

Government however provides a basket of free basic services (water, sanitation, refuse removal and electricity) which aims to improve the lives of the poorest and most vulnerable communities. To qualify for the basket of free basic services, a household must be classified as an indigent household as per the criteria determined by individual local municipalities. In general, a household is classified as indigent when the occupants in said households earn a combined income of less than a certain amount (poverty threshold) defined by the indigent policy of a municipality at that point in time. Municipalities review their indigent policies (and as such the determined amount) on an annual basis to bring the defined amount in line with reigning socio-economic conditions. According to Statistics South Africa, in 2017 most municipalities classified an indigent household as a family earning a combined income of less than R3 200 per month.



The above figure illustrates access to free basic services. Indigent households qualify for free basic water, electricity, sanitation and waste removal services. In 2018, the Cederberg had 2 105 indigent households, second lowest to the 1 753 households attributable to Bergrivier.

In line with the indigent households, free basic services across all categories fluctuated between 2015 and 2018, peaking in 2016 but then slumping in 2017 before reverting back to 2015 levels in 2018.

6

SAFETY AND SECURITY

The South African Police Service and Stats SA, has published the country's crime statistics for 2018/19, showing which types of criminal activity have increased/decreased in the past financial year.

The 2018/19 financial year saw increases in all contact crimes, including murder, sexual offences, attempted murder, assault with intent to cause grievous bodily harm, common assault, common robbery and robbery with aggravating circumstances.

Over the last year, 21 002 people were murdered across the country, up by 686 from 2017/18. The most common cause of murder was misunderstandings/arguments, followed by domestic violence and gang-related killings.

According to the 2018/19 crime stats, the murder rate increased by a staggering 3.4 per cent compared to the previous financial year. Most of these murders were committed between Saturday and Sunday, suggesting that weekends are the most violent and deadly periods in South Africa. The 2018/19 crime statistics indicate that there are 3 974 murders in the Western cape. The murder rate is currently at 59.4 per 100 000 people.

Sexual offences have, according to SAPS and Stats SA, shot up by 4.6 per cent in 2018/19 compared to the previous financial year. SAPS and Stats SA further revealed that a total of 52 420 sexual offences were reported in 2018/19, an increase of 3 212 compared to 2017/18.

The data depicted in the following section was sourced from the 2018/19 Crime Statistics released by SAPS and Stats SA in September 2019. Incidences of crime per 100 000 were calculated using actual crime and estimated population figures provided by the Department of Social Development.

The information relating to fatal crashes and crash fatalities were sourced from the Department of Transport and Public Works.



MURDER



Municipal Area		2016/17	2017/18	2018/19
Actual Number	Cederberg	21	28	27
	West Coast District	110	129	127
Per 100 000	Cederberg	40	52	48
	West Coast District	25	29	28

Definition: The unlawful and intentional killing of another person.

The 2018/19 crime statistics released by SAPS and Stats SA indicate that murder has increased by 3.4 per cent to over 21 002 cases recorded in 2018/19. This gives South Africa a rather alarming 58 murders a day and at a rate of 36.4 people murdered per 100 000 populations. Within the Western Cape Province, murder has increased by 23 per cent (245) from 3 729 to 3 974, in 2018/19. Within the Cederberg area, the number of murders decreased from 28 in 2018 to 27 in 2019; resulting in the murder rate (per 100 000 people) dropping from 52 in 2018 to 48 in 2019. The murder rate for the WCD also decreased – by 3.4 per cent from 29 in 2018 to 28 in 2019. The murder rate in Cederberg is by far the highest within the WCD in 2019.

SEXUAL OFFENCES




Municipal Area		2016/17	2017/18	2018/19
Actual Number	Cederberg	100	92	76
	West Coast District	556	514	512
Per 100 000	Cederberg	191	172	136
	West Coast District	127	114	114

Definition: Sexual offences includes rape (updated to the new definition of rape to provide for the inclusion of male rape), sex work, pornography, public indecency and human trafficking.

The rate of sexual offences in South Africa is amongst the highest in the world. With respect to the crime statistics released by SAPS and Stats SA, sexual offences increased by 4.6 per cent in 2018/19 compared to the previous financial year. SAPS and Stats SA further revealed that a total of 52 420 sexual offences were reported in this observed financial year, an increase of 3 212 compared to 2017/18. In 2019, there were 76 sexual offences in the Cederberg area; when comparing to the broader District, at 136, Cederberg's sexual offences rate (per 100 000 people) was significantly higher than the District's 114.

DRUG-RELATED OFFENCES




Municipal Area		2016/17	2017/18	2018/19
Actual Number	Cederberg	1 097	1 315	861
	West Coast District	7 064	8 188	5 819
Per 100 000	Cederberg	2 093	2 460	1 535
	West Coast District	1 616	1 817	1 292

Definition: Drug-related crimes refers to the situation where the perpetrator is found to be in possession of, under the influence of, or selling illegal drugs.

According to the 2018/19 crime statistics, the Western Cape Province has the highest rate of drug related in the country at 1 203 per 100 000. However, the 2018/19 stats showed figures were trending downwards since 2017/2018. While in 2017/18, 36.2 per cent of all drug-related crimes in South Africa occurred in the province, this year the province recorded 35.0 per cent of all drug-related crimes in the country. Drug-related crimes within the Cederberg area decreased in 2019, from 1 315 cases in 2018 to 861 cases in 2019. The WCD's drug related offences decreased sharply in 2019, from 8 188 in 2018 to 5 819 in 2019. When considering the rate per 100 000 people, with 1 535 crimes per 100 000 people in 2019, the Cederberg area is above that of the District and rate of 1 292.

DRIVING UNDER THE INFLUENCE



Municipal Area		2016/17	2017/18	2018/19
Actual Number	Cederberg	64	52	58
	West Coast District	509	579	659
Per 100 000	Cederberg	122	97	103
	West Coast District	116	128	146

Definition: Driving under the influence (DUI) refers to a situation where the driver of a vehicle is found to be over the legal blood alcohol limit. This is a crime detected through police activity rather than reports by members of the public.

Despite concerted efforts by government our roads are still considered amongst the most dangerous in the world. The number of cases of driving under the influence of alcohol or drugs in the Cederberg area shows a marginal increase of 6, from 52 in 2018 to 58 in 2019. This translates into a rate of 103 per 100 000 people in 2019, which is below that of the District's 146 per 100 000 people in 2019.

RESIDENTIAL BURGLARIES



Municipal Area		2016/17	2017/18	2018/19
Actual Number	Cederberg	257	216	218
	West Coast District	3 043	2 802	2 813
Per 100 000	Cederberg	490	404	389
	West Coast District	697	696	622

Definition: Residential burglary is defined as the unlawful entry of a residential structure with the intent to commit a crime, usually a theft.

The 2018/19 crime statistics released by SAPS and Stats SA indicate that the number of residential burglaries in the Western Cape decreased by 3 244 from 42 662 in 2018 to 39 418 in 2019. Notably, residential burglary cases within the Cederberg area increased modestly by 2 from 216 in 2018 to 218 in 2019. There was also a slight increase in residential burglaries in the broader WCD, from 2 802 in 2018 to 2 813 in 2019. At 389, Cederberg 's rate per 100 000 populations is below that of the District's 622.

ROAD USER FATALITIES

Area	2016	2017	2018
Cederberg	12	22	29
West Coast District	146	107	116

Definition: The type of road user that died in or during a crash i.e. driver, cyclist, passengers, pedestrians.

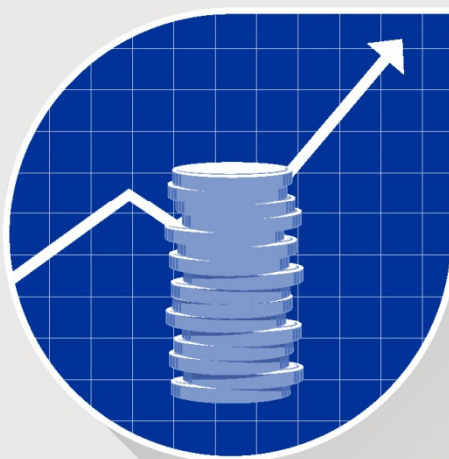
According to a recent study, the majority of road fatalities in Africa fall within the working age cohort - between the ages of 15 – 64 years – whilst three out of four fatalities were found to be male (Peden et al., 2013). The untimely death of these primary breadwinners therefore impacts directly upon not only the livelihood of family structures, but deprive society of active economic participants that contribute towards growth and development. The socio-economic impact of such road fatalities has proven to be particularly devastating in South Africa where the majority of road users hail from poor and vulnerable communities. As per the above table, a total of 29 road users died in these crashes, up by 31.8 per cent from 22 recorded in 2017. Comparative figures for the District indicates an increase in the overall number of road user fatalities in the District, increasing from 110 in 2017, to 121 in 2018.

7

THE ECONOMY

Economic activity within municipal boundaries is important as it shows the extent of human development and the living standards of communities. Although municipalities have no power to increase or decrease taxes to stimulate economic activity, there are few levers that local government authorities have control over to contribute to economic performance, including, among others, procurement of goods and services, job creation through expanded public works programmes as well as creating an enabling environment for small businesses.

The ability of households to pay for services such as water, electricity, sanitation, and refuse removal depends on income generated from economic activities. A slowdown in economic activity may result in job losses and the inability of households to pay for services, leading to reduced municipal revenues. Data on macroeconomic performance, especially the information on sectoral growth and employment, is useful for municipalities' revenue and expenditure projections.



ECONOMIC SECTOR PERFORMANCE

In 2017, the two main contributors to GDP in the Cederberg municipal area, i.e. the agriculture, forestry and fishing sector and the manufacturing sector, which contributed 23.8 per cent and 20.8 per cent to GDP respectively. However, while the agriculture, forestry and fishing sector is also the leading contributor to employment (43.2 per cent), the manufacturing sector contributes only 8.5 per cent to employment in the region. The contrasting employment contributions of the two drivers of GDP in the region is a clear indication that while the agriculture, forestry and fishing sector is reliant on labour for its productive activities, the manufacturing sector is highly capital-intensive. Other notable contributors to GDP were the wholesale and retail trade, catering and accommodation sector (13.5 per cent), and the transport, storage & communication sector (11.8 per cent).

Cederberg GDP performance per sector, 2008 - 2017									
Sector	Contribution to GDP (%) 2017	R million value 2017	Trend		Average Real GDP growth (%)				
			2008 - 2017	2014 - 2018e	2014	2015	2016	2017	2018e
Primary sector	24.0	912.6	3.6	1.2	8.0	-1.8	-7.3	11.7	-4.7
Agriculture, forestry & fishing	23.8	904.7	3.7	1.2	8.0	-1.8	-7.4	11.8	-4.7
Mining & quarrying	0.2	7.9	0.8	1.3	6.9	-0.1	0.8	1.7	-2.5
Secondary sector	27.7	1 054.7	4.4	3.4	4.7	3.1	2.3	3.0	3.7
Manufacturing	20.8	792.7	4.2	3.5	4.7	2.9	2.1	3.3	4.7
Electricity, gas & water	2.1	79.0	2.4	1.0	0.4	0.0	-0.5	1.9	3.2
Construction	4.8	183.0	6.1	3.7	6.8	5.6	4.4	2.0	-0.3
Tertiary sector	48.3	1 836.6	3.4	2.5	4.0	2.5	2.5	2.0	1.5
Wholesale & retail trade, catering & accommodation	13.5	514.2	3.1	2.3	2.8	3.3	3.2	0.6	1.4
Transport, storage & communication	11.8	450.5	4.3	3.4	6.8	1.9	2.6	3.6	1.8
Finance, insurance, real estate & business services	9.8	371.3	3.5	2.9	3.8	3.3	2.8	3.0	1.9
General government	8.1	309.2	3.7	1.7	4.2	1.1	1.1	0.7	1.2
Community, social & personal services	5.0	191.4	2.2	1.8	2.1	1.7	2.3	2.1	0.8
Total Cederberg	100.0	3 803.9	3.7	2.3	5.2	1.5	-0.1	4.6	0.5

(e denotes estimate)

The Cederberg municipal area experienced strong positive growth rates between 2008 and 2017, with an average annual growth of 3.7 per cent being realised over the reference period. While strong growth was experienced across the primary, secondary and tertiary sectors, the construction and manufacturing sectors, and the transport, storage and communication sector performed particularly well over the period. While the manufacturing sector continued this positive trend, according to estimates for 2018, a significant slowdown was experienced in other sectors, with the construction sector experiencing a slight contraction during the year. However, the largest cause for concern stems from the municipal area's main contributor to GDP - agriculture, forestry and fishing - experiencing a contraction of 4.7 per cent in 2018. Tepid growth and contractions in important sectors resulted in near-stagnancy for the

Cederberg municipal area in 2018, which registered an overall growth of 0.5 per cent during the year. New developments in the Cederberg municipal area, such as the 7 388 m² Cedar Mill Mall in Clanwilliam that opened in June 2018 has boosted growth and employment in the wholesale and retail trade, catering and accommodation sector².

LABOUR

This section highlights key trends in the labour market within the Cederberg municipal area, starting with employment data per sector, a breakdown of current skill levels in the labour force as well as the unemployment rates.

Cederberg employment growth per sector 2008 – 2017									
Sector	Contribution to employment 2017	Number of jobs 2017	Trend		Employment (net change)				
			2008 - 2017	2014 -2018e	2014	2015	2016	2017	2018e
Primary sector	43.2	11 306	-3 144	785	-488	2 257	-447	-365	-172
Agriculture, forestry & fishing	43.2	11 295	-3 144	785	-488	2 257	-447	-366	-171
Mining & quarrying	0.0	11	0	0	0	0	0	1	-1
Secondary sector	12.9	3 363	868	687	197	185	145	84	76
Manufacturing	8.5	2 216	422	380	119	142	54	37	28
Electricity, gas & water	0.2	59	22	8	3	2	1	2	0
Construction	4.2	1 088	424	299	75	41	90	45	48
Tertiary sector	43.9	11 498	3 521	1 836	364	446	278	409	339
Wholesale & retail trade, catering & accommodation	14.6	3 833	1 238	765	111	196	121	208	129
Transport, storage & communication	3.5	922	452	171	-7	60	45	43	30
Finance, insurance, real estate & business services	7.5	1 968	654	415	70	101	46	81	117
General government	7.6	1 983	592	198	134	-7	61	-39	49
Community, social & personal services	10.7	2 792	585	287	56	96	5	116	14
Total Cederberg	100	26 167	1 245	3 308	73	2 888	-24	128	243

(e denotes estimate)

Between 2008 and 2010, there was a net gain of 1 245 jobs in the Cederberg municipal area. In line with its GDP contribution, the agriculture, forestry and fishing sector is also the leading contributor to employment in the region. However, unlike the positive GDP growth rates experienced between 2008 and 2017, this sector experienced a net loss of 3 144 jobs over the ten-year period. The secondary and tertiary sectors have, however, been able to offset these losses with a combined net increase in employment of 4 389 jobs.

² Provincial Government Western Cape Municipal Perception Survey – Cederberg Municipality (2019)

Refreshingly, all sectors experienced net employment between 2014 - 2018, with the agriculture, forestry and fishing sector having created 785 jobs for this period. The sector recorded many employment opportunities in 2015, which was offset by job losses in 2014 and from 2016 to 2018 (estimate) periods. Other sectors which reported the largest increase in jobs between 2014-2018 were the wholesale, retail and trade (765), followed by financial and business services (415), and manufacturing (380), illustrating the shift in the labour force to more skilled and -semi-skilled workers.

Cederberg: Trends in labour force skills, 2006 - 2017				
Formal employment by skill	Skill level contribution (%)	Average growth (%)	Number of jobs 2016	
	2017	2014 - 2018e	2017	2018e
Skilled	12.1	3.5	2 356	2 433
Semi-skilled	35.2	4.6	6 882	7 133
Low-skilled	52.7	4.2	10 308	10 423
Total Cederberg	100.0	3	19 546	19 989

The majority of workers in the Cederberg labour force in 2017 were low-skilled (52.7 per cent), while only 12.1 per cent were skilled. The number of semi-skilled workers grew at a faster rate than that of low-skilled and skilled workers during the period 2014 - 2018. However, the growth of skilled workers also displays signs of bullish activity indicating an uptake for proficiency and sector specific skills. If the demand for skilled workers continues to grow at a faster pace, further capacitation of low-skilled and semi-skilled workers will be crucial to increase the supply of skilled labour to the area.

With a net loss of 2 784 jobs, low-skilled labour bore 82.7 per cent of the job losses over the three years. However, from 2011, there was a net increase in jobs. Despite the net increase in employment in the municipal area, low-skilled workers suffered further job losses in 2014 and 2017.

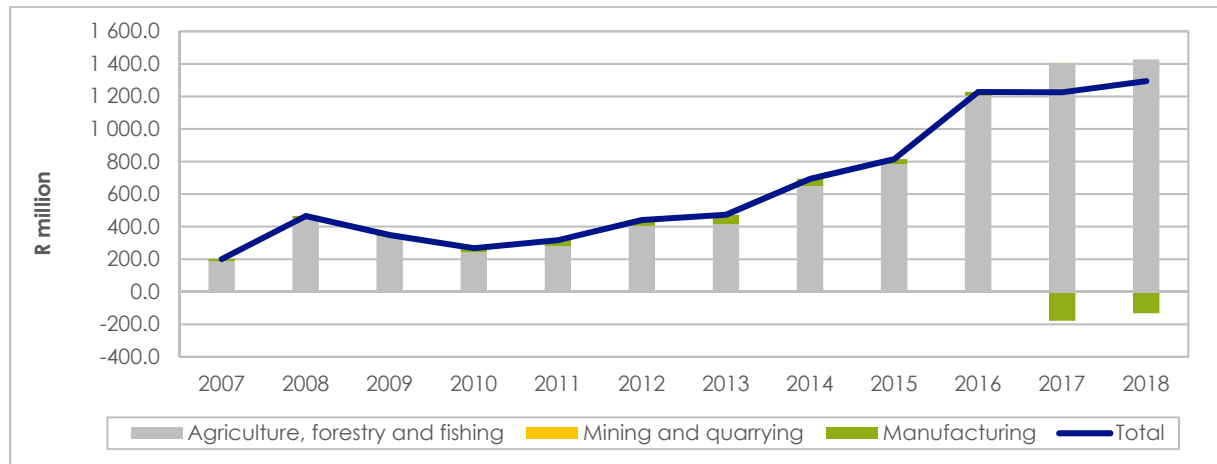
Unemployment Rates for the Western Cape (%)											
Area	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Cederberg	4.5	5.6	6.7	7.0	6.7	6.2	6.7	5.6	6.3	6.9	7.1
West Coast District	6.8	8.2	9.6	10.0	9.7	9.2	9.8	8.6	9.6	10.5	10.7
Western Cape	12.7	14.0	15.4	15.5	15.6	15.5	15.9	15.9	17.1	17.8	17.7

Since 2008, the unemployment rate³ has been rising moderately in the area, reaching 7.1 per cent in 2018. This is much lower than the district rate of 10.7 per cent in 2018, while lower than the provincial rate of 17.7 per cent. Cederberg also has the second lowest unemployment rate after Bergrivier (5.0 per cent) when compared to the rest of the WCD. However, unemployment remains a key challenge for the Cederberg area, with rising population numbers and rapid urbanisation are contributing factors as workers move to the area to seek jobs. Up-skilling of the labour force, implementation of levers such as local economic development strategies are all key in order to increase potential employment opportunities and boost economic growth in the area.

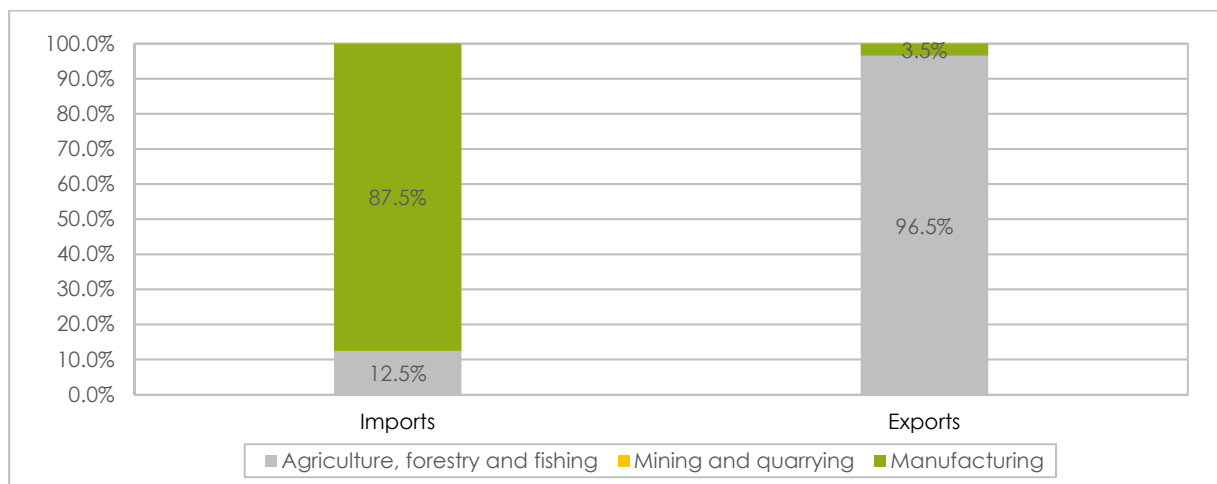
³ Narrow definition: Percentage of people that are able/willing to work, but unable to find employment. In turn, broad definition refers to people that are able to work, but not actively seeking employment. Broad definition is more difficult to accurately measure/calculate.

International Trade Dynamics

The Cederberg municipal area maintained a positive trade balance for all years between 2007 and 2018, which was driven primarily by the agriculture, forestry and fishing sector.



Since 2010, the agriculture, forestry and fishing sector's trade surplus has grown year-on-year, from R240.6 million in 2010 to R1.4 billion in 2018. While the manufacturing sector maintained a trade surplus between 2007 and 2016, the sector experienced trade deficits in the preceding two years - R179.0 million and R133.0 million in 2017 and 2018 respectively.



In 2018, 87.5 per cent of all imports were manufactured goods, while the remaining 12.5 per cent stemmed from the agriculture, forestry and fishing sector. Conversely, the Cederberg municipal area is highly reliant on the agriculture, forestry and fishing sector for its export revenue. In 2018, 96.5 per cent of all exports stemmed from the agriculture, forestry and fishing sector, with the manufacturing sector accounting for the remaining 3.5 per cent.

The top import into the Cederberg municipal area in 2018 was sugars and sugar confectionery, particularly cane or beet sugar, and chemically pure sucrose in solid form, from Zambia, Mauritius, and El Salvador. The second-largest import into the municipal area was machinery used for agricultural purposes, such as harvesting and threshing machinery, and machinery used for sorting and grading eggs, fruit or other agricultural products. These items were sourced from France, Spain, and the Netherlands. The third-largest import into the region was vanilla in whole form, sourced from Uganda and Madagascar.

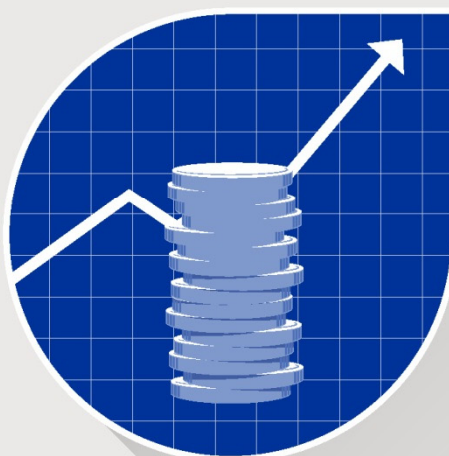
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PUBLIC INFRASTRUCTURE SPEND

Successfully leveraging infrastructure investment as a catalyst for broad-based economic growth and development can only be achieved through combined and complimentary contributions from all public sector spheres as well as the private sector.

The OPMII compared the 2019/10 MTREF infrastructure commitments made by the Western Cape Government (WCG) within the geographical jurisdiction of a local municipality to the capital budget contributions made by the various local municipalities themselves. As the provincial and municipal financial years do not fully align, the municipal capital budget information was sourced from the approved 2018/19 MTREF budgets. The 2019/20 municipal capital budget spend detailed in the OPMII therefore referred to the outer year estimates and not actual committed funds.

With the approval of the 2019/20 MTREF municipal budgets, Provincial Treasury is for the first time able to compare actually 2019/20 provincial and municipal infrastructure budget commitments.



PROVINCIAL INFRASTRUCTURE SPEND

Provincial infrastructure expenditure within the geographical boundaries of the Cederberg municipal area will amount to **R109.4 million** across the 2019/20 MTREF.

Cederberg: Provincial Infrastructure Investments, 2019/20 MTREF (R'000)				
Vote	2019/20	2020/21	2021/22	Total
Education	1 000	2 000	16 000	19 000
Health	2 500	2 562	-	5 062
Human Settlements	17 860	26 000	32 000	75 860
Transport and Public Works	9 575	-	-	9 575
Total	30 935	30 562	48 000	109 497

The majority of provincial infrastructure spend will be directed towards the Human Settlements function (R75.8 million across the 2019/20 MTREF or 69.2 per cent of Total MTREF expenditure) to construct housing projects across the municipality. Notable allocations are also made towards education (R19.0 million) and Transport and Public Works (R9.6 million).

MUNICIPAL INFRASTRUCTURE SPEND

As per schedule A5 in the approved 2019/20 budget, the Municipality's capital budget will amount to **R226.5 million** across the 2019/20 MTREF.

Cederberg: Capital Budget, 2019/20 MTREF (R'000)				
Functional Classification	2019/20	2020/21	2021/22	Total
Governance and Administration	3 508	1 866	900	6 274
Community and Public Safety	4 047	26 643	32 123	62 813
Economic and Environmental Services	15 185	15 198	14 289	44 673
Trading Services	37 960	36 538	38 236	112 733
<i>Energy Sources</i>	9 697	8 946	11 304	29 947
<i>Water Management</i>	18 170	26 852	26 582	71 604
<i>Waste Water Management</i>	9 748	400	350	10 498
<i>Waste Management</i>	345	340	-	685
Total	60 699	80 245	85 549	226 492

At R112.7 million, Trading Services accounts for the largest proportion of municipal capital expenditure as per Budget Schedule A5 of the adopted 2019/20 Budget. The substantial allocations towards Water Management (R71.6 million) across the MTREF is encouraging from an economic stimulus viewpoint given the significance of water as an input to the key agriculture, forestry and fishing sector which is a large nett employer within Cederberg. Furthermore, the relevance placed on economic development and stimulation appears to have gathered momentum with a notable allocation of R44.7 million across the 2019/20 MTREF.

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- Population: *Department of Social Development, 2019*
- Sex Ratio: *Department of Social Development, 2019*
- Age cohorts: *Department of Social Development, 2019*
- Number of Households: *Department of Social Development, 2019*
- Household size: *Department of Social Development, 2019*
- Population Density: *Department of Social Development, 2019*

2. Education

- Learner enrolment: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- Learner-teacher ratio: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- Learner retention: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- Educational facilities: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- No-fee schools: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- Schools with libraries: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*
- Educational outcomes: *Western Cape Education Department, 2019; Annual Survey of Public and Independent Schools (ASS), 2018*

3. Health

- Healthcare facilities: *Department of Health, 2019*
- Emergency medical services: *Department of Health, 2019*
- HIV/AIDS: *Department of Health, 2019*
- Tuberculosis: *Department of Health, 2019*
- Child health: *Department of Health, 2019*
- Maternal health: *Department of Health, 2019*

SOURCES

4. Poverty

- GDP per capita: *Quantec Research, 2019*
- Income Inequality: *IHS Global Insight, 2019*
- Human Development: *IHS Global Insight, 2019*

5. Basic Services

- Households: *Statistics South Africa, Community Survey 2016*
- Access to housing: *Statistics South Africa, Community Survey 2016*
- Access to water: *Statistics South Africa, Community Survey 2016*
- Access to electricity: *Statistics South Africa, Community Survey 2016*
- Access to sanitation: *Statistics South Africa, Community Survey 2016*
- Access to refuse removal: *Statistics South Africa, Community Survey 2016*
- Dwelling type: *Quantec Research, 2019*
- Consumer units: *Statistics South Africa, Non-Financial Census of Municipalities 2015, 2016, 2017 and 2018*
- Indigent Households: *Statistics South Africa, Non-Financial Census of Municipalities 2015, 2016, 2017 and 2018*
- Free Basic Services: *Statistics South Africa, Non-Financial Census of Municipalities 2015, 2016, 2017 and 2018*

6. Safety and Security

- Murder: *South African Police Service (SAPS), 2019, own calculations*
- Sexual offences: *South African Police Service (SAPS), 2019, own calculations*
- Drug-related crimes: *South African Police Service (SAPS), 2019, own calculations*
- Driving under the influence: *South African Police Service (SAPS), 2019, own calculations*
- Residential burglaries: *South African Police Service (SAPS), 2019, own calculations*
- Road user fatalities: *Department of Transport and Public Works, 2019*

SOURCES

7. Economy

- Sector Performance: *Quantec Research, 2019*
- Employment growth per sector: *Quantec Research, 2019*
- Trends in labour force skills: *Quantec Research, 2019*
- Unemployment rates: *Quantec Research, 2019*
- Trade balance: *Wesgro, 2019*
- Sectoral trade distribution: *Wesgro, 2019*

8. Public Infrastructure Spend

- Provincial Infrastructure Spend: *Estimates of Provincial Revenue and Expenditure (EPRE), 2019; Overview of Provincial and Municipal Infrastructure Investment (OPMII), 2019*
- Municipal Infrastructure Spend: *Final approved 2019/20 municipal budgets, Budget Schedule A5*