



THE GREATER  
**TYGERBERG**  
PARTNERSHIP

INVESTMENT PROSPECTUS 2021



**DISCOVER BELLVILLE 2021**

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# ABOUT BELLVILLE

## WHY INVEST IN BELLVILLE?

**B**ellville is the most opportunistic city in South Africa. Highly connected, with two major highways, just 12 minutes from the multi-award-winning Cape Town International Airport, and host to one of the busiest public transport interchanges in the country, Bellville is a unique and growing place full of opportunities to live, work, invest and play.

It is a centralised, dynamic urban centre and a highly connected, mature economic node with well-established infrastructure, affordable property, accessible transport links, a diverse population, fast fibre and true growth potential.

It is a centre of excellence for the academic and health sectors, and a thriving commercial and retail centre. It is a hub for manufacturing, logistics and transport. It is a place to create, to live and to play.



*In this document we unpack Bellville's multi-faceted assets and present the investment case to support investors and developers seeking to take advantage of the multi-sectoral opportunities that Bellville offers.*

**WE INVITE YOU TO JOIN US.**

# COME DISCOVER BELLVILLE.



**CAPE  
TOWN**

**GREATER  
TYGERBERG**

**A PLACE OF POTENTIAL  
AND OPPORTUNITY.**

**THIS IS**

# BELLVILLE



# FOREWORDS

## ALAN WINDE

Premier, Western Cape Government

In recent years, South Africa has experienced two pandemics: the COVID-19 health pandemic and the widespread unemployment crisis. While the Western Cape has the lowest unemployment rate in the country and has an excellent record in the management of the pandemic, the province was also hard-hit by the effects of these twin shocks to the economic and social system. That is why, from the outset, I have committed the Western Cape Government to fighting to save both lives and livelihoods in the province. This is because a job is not just a 'nice to have' but is often the difference between being able to feed your family or going hungry. To put it simply, jobs save lives too. The Western Cape's recovery

plan has been forged to grow the economy and create jobs by making it easier to do business, boosting exports and investments, boosting infrastructure, scaling up opportunities to develop skills and to build overall economic resilience. The two other equally important and interconnected pillars of this plan are achieving safer communities across our province and realising the well-being and dignity that each person in the Western Cape deserves. Together, these three priorities are our guiding 'north stars'. In executing this plan, we want to learn from our noteworthy COVID-19 response. When responding to the pandemic, we were agile, embraced innovation and got the job done in record time.



## MICHAEL SPICER

Chairman, Wesgro

Like the Western Cape, Bellville is open for business. It is a microcosm of the overall Western Cape offering. Established road, air, rail and port infrastructure creates a gateway to Africa.

An extensive and fast fibre network makes it easy to learn and do business. The knowledge economy connects academia with tech, manufacturing and commercial innovation. A talent pipeline fuels business growth, particularly within the burgeoning business process outsourcing sector. Industrial production and logistics capabilities take local creativity far beyond the region's borders. And a cosmopolitan population enriches the texture and vibrancy of the area. The area is the secondary economic engine in the Western Cape, not only supporting Cape Town as

the primary centre, but also connecting and feeding the multiple points of the provincial social and financial ecosystem. This makes Bellville an economic powerhouse that is ripe for investment and positions the area as a key node to drive its long-term sustainable development.

Bellville's success is a key driver in the success of the province as a whole. It is a significant opportunity for investment. As the official tourism, trade and investment promotion agency for the Western Cape and Cape Town, we are keen to see the Bellville opportunity transformed into dynamic reality.

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BELLVILLE IS OPEN FOR BUSINESS; AN ECONOMIC POWERHOUSE RIPE FOR INVESTMENT.

- MICHAEL SPICER



## WARREN HEWITT

CEO, Greater Tygerberg Partnership

When I meet investors interested in exploring Bellville's immense potential, I always say that they are sitting on a gold mine. What already exists in Bellville is a potent package of affordability, connectivity and accessibility. Once investors understand the advantages they can access immediately, we urge them to take advantage of its potential.

I truly believe that Bellville is the most opportunistic city in the country. It is ripe for development, both by the public sector at national, provincial and city levels and by private developers who need to get in now to secure good returns on their investment. As the City's implementation agency for Bellville's revival, we are evangelists for that potential. Over the past few years we have laid some solid foundations for Bellville's

emergence as an inclusive, progressive and innovative environment that lies at the centre of, and serves, the Cape Town metropole. A thriving secondary city to support Cape Town.

Our philosophy is to encourage everyone who we talk to to see beyond what is on the ground in Bellville and to see the immense potential that lies behind it. Our role is to facilitate those development efforts. We're connectors: we connect people and partners with possibilities. This document unpacks all of that potential in more detail. It also serves as a call to action to developers, investors, institutions and individuals.

**COME AND TALK TO US AND LET US MAXIMISE THAT POTENTIAL TOGETHER, FOR STRONG FINANCIAL RETURNS FOR INVESTORS AND DEEP SOCIAL BENEFITS FOR EVERYONE IN BELLVILLE.**

## ALDERMAN DAN PLATO

Executive Mayor, City of Cape Town

Bellville has long been considered as a key node within the City of Cape Town, with the potential to become a second CBD. Bellville has demonstrated its resilience and continues to present immense possibilities for growth and innovation, with a diverse set of land uses, including sectoral clusters of education, industry, commerce, health, and social services, coexisting informal and formal trade and a logistics and transport corridor. Rapid urbanisation impacts the availability of land, the cost of accommodation and the availability of jobs in

Cape Town. These factors have influenced the long-held vision of developing Bellville as Cape Town's second CBD. The regeneration of the Bellville CBD is one of the implementation priorities of the City's Integrated Development Plan (IDP). The Bellville Future City transit-oriented development (TOD) plan is conceived to enhance economic development and transform the built environment. The spatial vision and masterplan will be a catalyst for the development of the Bellville CBD, which is a long-term project that will span multiple financial years. Its implementation comprises short-

term urban management interventions to create an enabling environment attractive for investment, as well as the medium to long-term regeneration of the Bellville CBD. Through this programme, the City will drive Bellville's economic regeneration and spatial transformation, leveraging significant public investment in economic, mobility, social and utility infrastructure. This project is a critical step in realising the City's long-term vision for residents, businesses and investors whose investments today will set a solid foundation for Bellville Future City.

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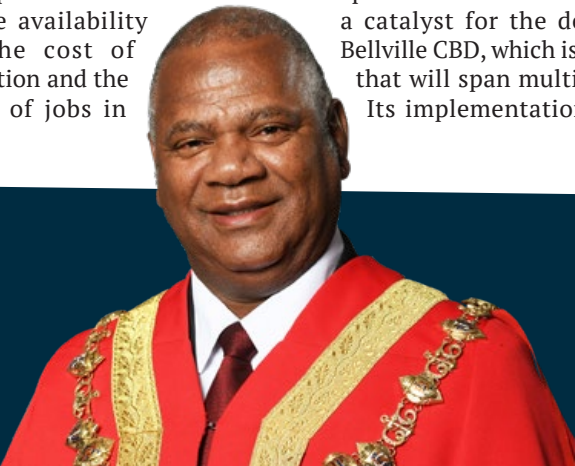
BELLVILLE HAS DEMONSTRATED ITS RESILIENCE AND CONTINUES TO PRESENT POSSIBILITIES FOR GROWTH AND INNOVATION.

- ALDERMAN DAN PLATO

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WHAT ALREADY EXISTS IN BELLVILLE IS A POTENT PACKAGE OF AFFORDABILITY, CONNECTIVITY AND ACCESSIBILITY.

- WARREN HEWITT





# BELLVILLE FUTURE CITY

Bellville today supports Bellville Future City, a 30-year masterplan to drive the city's development as a strategic economic powerhouse. The masterplan maximises Bellville's existing assets to underpin the area's development as Cape Town's secondary city and to transform Bellville into an economically vibrant, connected community that lives, works and plays in a quality, safe and accessible 24-hour urban environment.

## FRANK CUMMING, DIRECTOR, URBAN CATALYTIC INVESTMENTS CITY OF CAPE TOWN

On 1 March 2021 the Executive Mayor, Alderman Dan Plato, launched Bellville Future City, the City's vision for the regeneration of the Bellville CBD. As the second metropolitan node of Cape Town, Bellville Future City will act as a vibrant socio-economic hub that promotes integrated urban living, and maximises Bellville's unique offering of location, connectivity and infrastructure investment to attract a broader demographic mix to enjoy, live and work in the city.

# 4

Four distinct sectors underpin the Bellville Future City regeneration strategy:



EDUCATION



INNOVATION



HEALTHCARE



GOVERNMENT

The City's vision for the economic regeneration and spatial transformation of Bellville will be enabled through improved urban management and maximising the existing and significant public investment planned for the area, including: public realm, social, economic, utility and mobility infrastructure.

A programme of short-term interventions aimed at addressing problems associated with high levels of crime and grime has already begun through the Mayor's Visible Service Acceleration Programme (MVSAP).

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*The intention is to stabilise the area through improved urban management and enforcement responses so as to create a favourable environment for investment. The programme is designed to improve the area's attractiveness as an investment destination, and to attract greater private investment to build on Bellville's unique strengths and competitive advantages.”*



## BELLVILLE'S COMPETITIVE ADVANTAGE

### PARTNERSHIP

Realising the regeneration of Bellville requires the adoption of a partnership based approach which maximises current and planned public investments in a targeted and strategic manner. The City is already engaging with representatives from business and the local tertiary education institutions through the Bellville CEO and the Bellville Higher Education Forums respectively, which are both facilitated by the Greater Tygerberg Partnership (GTP).

The City is also engaging with other spheres of government and state owned entities, including the National Department of Public Works, and various Provincial Government departments, who have expressed an interest in taking up accommodation in Bellville.

The objective of these partnerships seeks to better align investment plans and identify opportunities to collaborate, across spheres and entities, in a sequenced and synchronised manner. The City would welcome any suggestions on areas of possible collaboration that should be investigated or taken forward.

This is part of the City's facilitation of a counter-cyclical economic recovery, which it is hoped will ignite private sector confidence in the area.





**A**s part of the City's plans for Bellville, the City is in the process of preparing a Local Spatial Development Framework (LSDF) for the Bellville CBD. An LSDF is a Council adopted medium-term plan that sets the future development vision for a defined geographical area, in this case the Bellville CBD. The LSDF seeks to guide the spatial distribution of desired land uses and investment within the study area.

## LOCAL SPATIAL DEVELOPMENT FRAMEWORK

The City aims to undertake an extensive public engagement process for the preparation of the Bellville CBD LSDF. The public is invited to register as an Interested and Affected Party in this process via the following link: [www.capetown.gov.za/City-Connect/Have-your-say/Issues-open-for-public-comment/bellville-cbd-local-spatial-development-framework](http://www.capetown.gov.za/City-Connect/Have-your-say/Issues-open-for-public-comment/bellville-cbd-local-spatial-development-framework)

In addition to the statutory public participation process, key stakeholder groups are being identified and focus sessions will be held with the aim of gaining inputs on the draft. The GTP is facilitating some of these engagements on behalf of the City while also providing a valuable channel of communication between the City and the broader public.



## THE SIGNIFICANCE OF HERITAGE

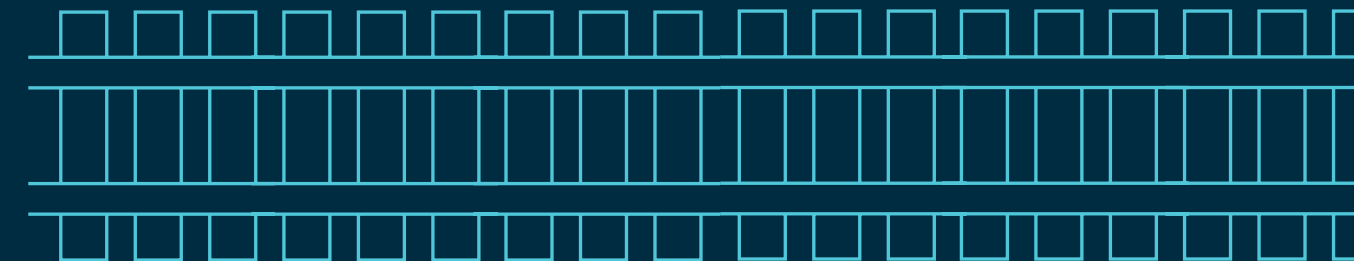
**T**he City's vision for the regeneration of Bellville is established on a rich legacy of mobility and trade. The village of Bellville emerged due to its location on a major trade route connecting Cape Town with Stellenbosch and the hinterland beyond. Established some 12 miles from Cape Town, with a reliable source of fresh water, it served as an ideal location for an outspan, remnants of which remain today in the form of the 12 Mile Post and the Hardekraaltjie camp site respectively.

The construction of a rail line around 1859 elevated Bellville's prominence and importance, stimulating growth from a village into a small town, with the area that is now Boston being its most popular suburb.

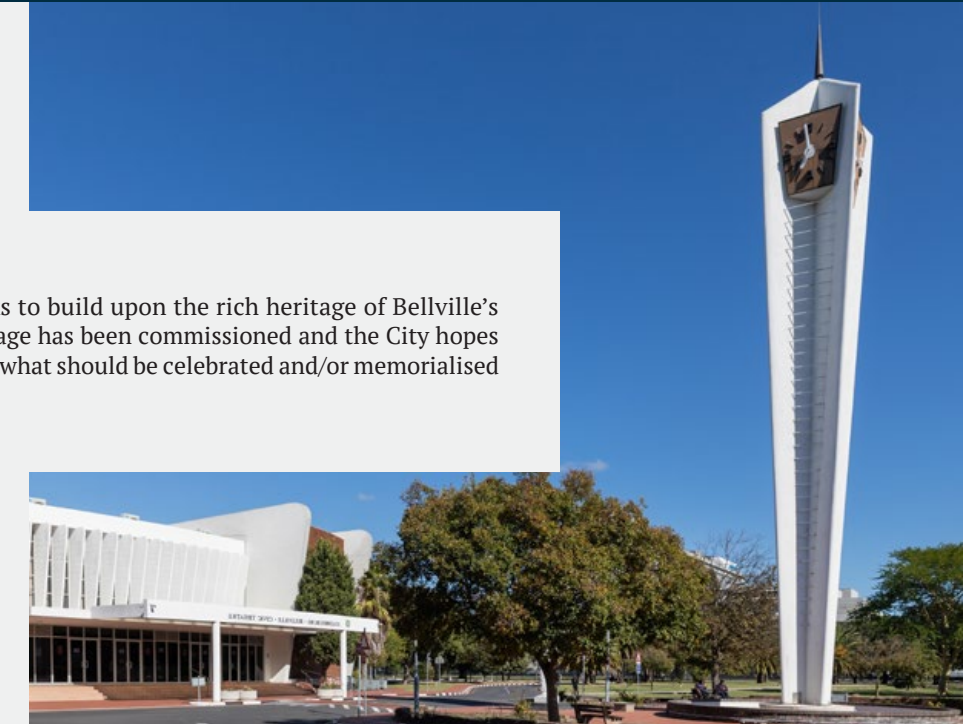
Over the years, Bellville developed significantly with the railway line being used, thanks to Apartheid-era planning, as a buffer between the middle-income white suburbs to the north and the poorer black and coloured areas to the south. At the time, Bellville was reimagined as a progressive and modern commercial hub of Cape Town. One that broke away from the traditional colonial urban form and architecture that is found in Cape Town CBD.

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*Today, Bellville is undergoing another transformation. It is transitioning into a modern African city with a diverse economy and multicultural community.”*



The City's regeneration of Bellville seeks to build upon the rich heritage of Bellville's origins. An exploration of Bellville's heritage has been commissioned and the City hopes to collaborate with the public on how and what should be celebrated and/or memorialised in future interventions.





## MOVEMENT NETWORK IMPROVEMENTS

Bellville continues to play a critical role in the movement network of the metropole. As such, Bellville has the potential to integrate the city in a truly meaningful way.

Through a portfolio of short, medium and longer term strategic interventions and investments, Bellville's regeneration involves improving the efficiency and functionality of the movement networks within the area and beyond. The completion and/or realignment of missing links in the local road based movement system, in addition to significant public transport investments, will enhance accessibility to the Bellville CBD as a connector with the rest of the Metropole.



The functionality of the movement networks is underpinned by improved rail services, and a better structured road-based public transport network operating out of an integrated transport hub. These improvements will not happen overnight and will need to occur in collaboration with the City's partners in Government, state-owned entities, operating companies, private entities, and others.



## GREEN NETWORK

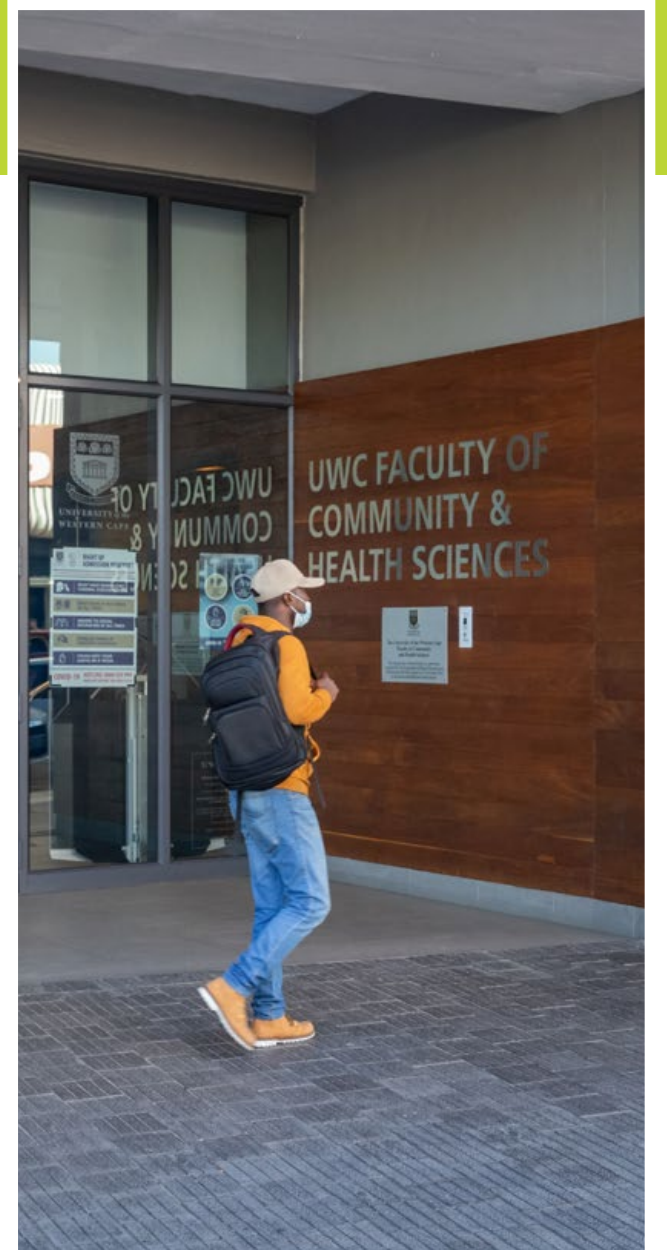
Bellville CBD benefits from an enviable green network of interconnected spaces that stretches from Jack Muller Park in the North, along the Elsieskraal River Corridor to the Elizabeth Park and through the Bellville Sports Complex to the Hardekraaltjie Campsite. The green network provides a range of recreation and sport facilities that offer relief from the urban environment. The City is in the process of engaging the public on the planned upgrades to this network. These upgrades aim to enhance community connections into and around the network.



## INNOVATION DISTRICTS

The cluster of tertiary academic and vocational institutions and businesses located in and around Bellville provides a unique opportunity to promote the regeneration of Bellville through the establishment of an Innovation District. The City is launching a process to identify which sector would be most responsive to this development. Alongside this, the City is identifying possible implementation mechanisms and incentives that could be activated to support such an initiative. The City is also investigating the infrastructure quality and capacity that will be required to support such an initiative in the long-term.

Establishing an innovation district in Bellville will position the area as a forward-looking competitive business city that promotes economic inclusivity and innovation by maximising the local knowledge economy.





# TRANSPORT

## BELLVILLE: A CITY ON THE MOVE

### PUBLIC TRANSPORT



The Bellville taxi rank sees a total of **50 000 passengers daily and 142 000 passenger trips via 30 routes daily**. This is compared with **48 000 and 31 000 daily passengers** at Cape Town Station taxi rank and Khayelitsha respectively.

The Cape Town to Bellville Golden Arrow Bus Service (GABS) is the fifth busiest GABS route in the city, transporting **1 300 passengers daily with over 31 000 passengers moving in and out of Bellville daily**.

Five rail links connect at Bellville Station, with nine train stations serving the area. These lines are:

- Wellington to Cape Town via Woodstock: **90 000 passengers daily (est.)**
- Muldersvlei to Cape Town (two lines via Stellenbosch and Esplanade): **30 000 passengers daily (est.)**
- Strand to Cape Town via Bellville and Parow: **44 000 passengers daily (est.)**
- Bellville to Cape Town via Esplanade and Langa: **35 000 passengers daily (est.)**



## FUTURE INVESTMENTS IN PUBLIC TRANSPORT INFRASTRUCTURE

A new rail link from Khayelitsha, four planned high capacity MyCiTi trunk lines, a transformed Bellville Station as well as three public transport interchanges will make this one of the most connected and accessible areas in the city by 2032. According to the 2032 Integrated Public Transport Network Plan for Cape Town, the new MyCiTi trunk lines will have a capacity of 10 000 passengers per hour in each direction that will serve the Greater Tygerberg Area.

### New Blue Downs Rail Link

PRASA and the City of Cape Town are prioritising a new line from Nolungile Station to Kuilsriver Station through the Blue Downs area. This is expected to carry more than 20 000 passengers per hour per direction by 2030. The double track line will be approximately 9km long and comprise three new railway stations between Nolungile and Kuilsriver station, providing a direct link to the Metro South East residential suburbs and Blackheath, Kuilsriver and Bellville commercial and industrial employment areas. The new proposed stations are at Mfuleni, Blue Downs and Wimbledon.

- New Blue Downs rail line from Nolungile station to Kuilsriver station, providing a direct link between the Metro South East and Bellville
- Symphony Way: a north-south line from Mitchell's Plain CBD to Bellville CBD and continuing to Durbanville north
- Westlake-Bellville: A north-east line from Westlake to Bellville CBD via Parow Industria
- Eersterivier-Blouberg: A north-south link from Eersterivier Station to Parow continuing to Sandown station
- Kraaifontein-Century City: An east-west line from Century City via Goodwood and Parow along Frans Conradie Drive to Bellville at Boston and continuing north to Durbanville and Wallacedene
- Enclosed terminal stations will be built at Bellville Station at Charl Malan Street and Durbanville at New Street: T13 served by 3 feeder routes (D01, F40, F44)
- Major transformation of Bellville station planned, with refurbishments to Parow, Tygerberg and Elsies River interchanges T13, T14, T16 and T19 MyCiTi trunk lines to connect through the area via Bellville CBD
- Review of PT1 and PT2 zones to reduced parking requirements for future developments
- A proposed future airport rail link

### Cape Town International Airport expansion

A total of R7 billion has been allocated by Airports Company South Africa (ACSA) to expand Cape Town International Airport within the next three years. The upgrades are targeted at realigning the airport runway, expanding the domestic arrival and international terminal. These three projects will have a significant impact and make a positive contribution to the local economy.

### Cape Winelands Airport

The former Fisantekraal Airstrip, located 13kms north-east of Durbanville, is to be developed into a 'residential' airport in an ambitious proposal to replicate Lanseria airport in Gauteng. While this project is a long-term one, this will offer additional connectivity for business commuters travelling to the northern suburbs of Cape Town.

## ROAD INFRASTRUCTURE

The Greater Tygerberg area is well served by road and rail infrastructure, providing connectivity and accessibility on a suburban, metropolitan and regional scale. The existing road-rail transit-oriented system serves as a strong platform to support the future intense development across the area.

### The road infrastructure in the area includes:

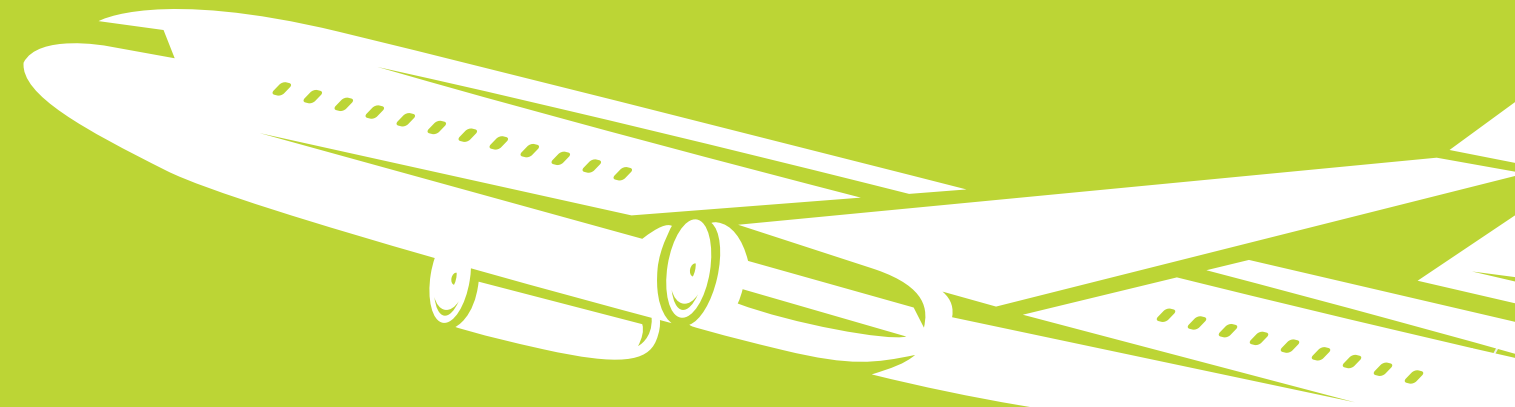
- The N1 to the north, providing connections to Cape Town CBD or nationally in the opposite direction
- Voortrekker Road, providing an east-west connection between Bellville and Cape Town CBD
- The R300, linking to Khayelitsha and Mitchells Plain to the south
- The Durban Road link from Bellville CBD to the N1 and Tygervally, with additional north-south links provided by Vasco Boulevard, Giel Basson Drive, Mike Pienaar Drive (M16) and McIntyre Street (M14)





## MARK MACLEAN

Acting General Manager, Cape Town International Airport



Cape Town International Airport processes 11 million passengers a year (pre-COVID) and provides 9 000 jobs. Its economic contribution is significant, as an airport city, expanding into an aerotropolis that has a catalytic impact on its immediate vicinity. We think not only about our local impact but also about how we can maximise opportunities for partner cities, both locally and abroad.

The long term plans for the aerotropolis include a rail link to Bellville, which brings the world even closer to the area, and takes the Bellville offering global. Now, and in the future, the airport supports multiple sectors active in Bellville, from tourism, to cargo, logistics, freight and, with the proposed rail link, transport, among others. Bellville falls within the planned aerotropolis area, and businesses and industries operating in Bellville are ideally placed to take advantage of the opportunities for growth and development. The transport, logistics and even education sectors are among those that could benefit from the expansion. Consider, in just one example, the plethora of international academies able to offer easy access to candidates travelling abroad for their training. An overnight flight and a short journey from airport to door takes candidates from home to training and back again quickly and easily. During the four or five years before the peak in 2019, we saw a significant increase in flights in and out of Cape Town.

In particular, international traffic was growing by 10% per annum, with a number of new routes being established. Cargo traffic grew by 52% from 2016 to 2019. Under the shadow of the pandemic, tourism faltered, but we saw a significant increase in the movement of cargo across the world. Inbound and outbound airlines that would usually be full of people are now full of cargo. In addition, we are seeing a growing trend towards overnight shipments of low-weight, high-value goods such as food production and electronics.

This is a fantastic opportunity for producers, logistics businesses and manufacturers in Bellville, and we have adopted a strategy to grow the cargo business in future. Logistics investments around the airport for example, warehousing, support road, rail and air cargo but also accommodation, food production and logistics. For Bellville investors, these opportunities for global and local access are right on your doorstep. We believe these opportunities have only just touched the surface of the potential. While there has been a lot of change in the air transport sector as a result of the pandemic, we also believe now is the ideal time to think about future growth. Our forecasts suggest that within five years we will be back to the passenger numbers we were seeing in 2019 – depending on regulations, of course.

As a case in point, while our expansion plans were halted in the climate of uncertainty, we are preparing ourselves to take advantage of the recovery. We believe the time is right for businesses around us to do the same. In many cases, these could be the simple things that help a business to pivot, such as reconfiguring business structure, processes and services, as well as more strategic or fundamental shifts. While the perceived risk in terms of regulations and specialisms may be high, there are opportunities to build successful operations in the airport and travel industry, even in these constrained times. Given its natural location within the footprint of the aerotropolis, in Bellville these opportunities are ready for the taking.





# GLOBAL RESIDENTIAL PROPERTY TRENDS

**Younger and first-time buyers** are opting for smaller homes in more medium-density developments, where they can access a wider range of amenities and services available 24/7, and because of convenience, cost considerations and a reduced maintenance load. This has led to the emergence of smaller apartment footprints and micro-units, which are 20% to 30% smaller than a conventional sized studio apartment. First-time buyers focus more on location. Factors like congestion, long work hours, increasing public transport costs and increasing fuel prices mean people are willing to sacrifice other factors in order to live in smaller, better-located properties (often sectional titles).\*

- Based on a 2018 study there has been a gradual and steady increase in flat rentals in line with the investment in affordable accommodation.
- Lower increases in sectional title property values over 10 years compared to full title properties
- Greater demand for standard flats compared with upmarket flats, with rental increases of between 80% and 130% for standard units

## DEVELOPMENT TRENDS IN THE GREATER TYGERBERG AREA

**Bellville offers a good selection of residential property at different prices, attracting diverse buyers, from first-time buyers to retirees. Single residential homes are well-built and offer good value for money. In addition, the area enjoys a central location, a wide range of amenities and excellent transport links. As a result, consistent demand has ensured unusual price growth for those who have bought property in the area.\***

\*Serendipityremix, for GTP Property Survey 2021

## A COMPARISON WITH OTHER CAPE TOWN SUBURBS

### Potentially lower development costs in Bellville

The costs and risks of developing affordable housing in the Greater Tygerberg Area are potentially lower than the Cape Town CBD due to lower land prices per square metre.

### Lower demand for commercial space and significant demand for affordable housing

Since 2011/2012, Grade A and B office vacancy rates have been decreasing in both Bellville and Cape Town CBD, with vacancy rates in Bellville being consistently lower. Where supply of office space exceeds the demand, the conversion to residential space is gaining popularity. This is especially

true in CBD areas where there is a scarcity of mid-market residential property for young professionals looking to live closer to work.

### Oversupply of upmarket residential units in Cape Town CBD

There has been a lack of new affordable rental supply in the Cape Town CBD, and an oversupply of upmarket apartments or units targeting higher income groups. This presents a potential opportunity for the Greater Tygerberg Area to cater to the demand for affordable accommodation developments focused on lower-middle income groups.

### Steady property values relative to other suburbs

The average price per square metre of full-title residential property within the Greater Tygerberg Area has remained relatively steady over the past 10 years, relative to other suburbs in Cape Town, namely Milnerton, Observatory and Woodstock.

### Steadily growing investor confidence

The Annual Residential Index has increased gradually year on year for both full and sectional titles within the Greater Tygerberg Area. The 2020 FNB Commercial Property Finance Property Insights report speculates that affordability and

basics will take centre-stage for the next few years. This means that:

- Residential developments towards the more affordable end of the market are likely to be a key theme.
- Affordable community shopping centres will take preference over larger and more costly regional and super-regionals.
- Categories such as storage space are projected to outperform non-essentials, like the Hotels and Leisure category.

## MAJOR INVESTMENTS

Property values in the Bellville CBD have risen by 52.5% since 2010. The figure is a reflection of growing interest in Bellville and the broader Greater Tygerberg Area by savvy investors seeking to make strong returns, capturing the rising tide of opportunity in the area.

Investment values between 2015 and 2019 were consistent at over R600 million per year. Between 2010 and 2021, the total value of approved building works in the area equates to R7.3 billion, covering a footprint of 990 286 square metres. Of that, R4.86 billion was invested in the five years between 2015 and 2020.\*

## COMPLETED



### PAROW CENTRE

**Value: R1 billion**

Parow Centre and its surrounding facilities are undergoing a five-year upgrade plan. The upgrade entails the refurbishment of Pick n Pay and the surrounding shopping centre, the introduction of an additional four levels of new parking bays, and the refurbishment of existing council offices. A 20 000m2 commercial/office space and 25 000m2 hospital have also been introduced into the plan. A new train station stop will also be part of the upgrade.

### KARL BREMER BELLVILLE HEALTH OFFICE

**Value: R128 million**

A part of Karl Bremer Hospital, the new R128 million Bellville Health Park provides accommodation for over 320 public servants from the Department of Health across 14 000m2. The building was awarded a Green Building Council of South Africa (GBCSA) 5-Star Green Star rating. It will create minimal waste, use passive solar design, and offer bicycle-friendly facilities.

### STANFORD INDUSTRIAL PARK

This industrial building is situated in Parow Industria and comprises 2 000m2 of industrial space, which can be subdivided into two units of 1 000m2 each.

### SUNSKILL LABORATORY

**Value: R120 million**

Completed in 2019, the simulated skills and training laboratory uses technology to virtually train students and manage patients. This is a long-term collaboration between Stellenbosch University and global medical technology corporation, Medtronic.

### CITY OF CAPE TOWN WATER AND SANITATION HEAD OFFICE

**Value: R270 million**

The City's new Water and Sanitation head office, situated on Voortrekker Road, was completed in 2018 at a cost of R270 million. The four-storey 10 000m2 building was awarded a GBCSA 5-Star Green Star rating.

\* GTP Research Programme 2021





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*The Centre is a national asset that will contribute to the better understanding of factors that impact on the health of South Africans and inform strategies to improve their response to diseases. We are now a part of a small group of forward-thinking countries that are pioneering genomic science to address the burden of disease in Africa which carries the greatest genetic diversity.”*

– PROFESSOR GLENDA GRAY, SAMRC PRESIDENT AND CEO

## UWC FACULTY OF COMMUNITY AND HEALTH SCIENCES BELLVILLE CAMPUS

**Value: R244 million**

The University of the Western Cape completed its conversion of the 10-storey Jan S Marais Hospital in Bellville CBD. The new Community Health Sciences building cost R244 million and provides state-of-the-art healthcare training for nearly 2 000 future nurses and other health professionals.

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## THE AFRICAN GENOMICS CENTRE

**Value: R95 million**

This big data project opened in Bellville in 2018. A collaboration with the Beijing Institute, the goal of the centre is to conduct genomic research to address the growing disease burden of South Africa, and to build towards a future in which the Fourth Industrial Revolution is a major component in Africa healthcare.

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## SUNHEART DIVISION OF CARDIOLOGY AT TYGERBERG HOSPITAL

**Completed in 2014**

This project secured improvements to the Department of Cardiology at Tygerberg, enabling better treatment and training facilities, and attracting national and global specialists. It was a multi-million rand investment by strategic partners, including Medtronic, GE Healthcare, Amayeza Abanthu, Mediclinic, Diacoustic Medical, the Western Cape Ministry of Health and The British Society of Echocardiography.

## THE GALLERIA, A PROJECT OF IMPRESSIVE SCALE, DEVMARK PROPERTY GROUP

As the tip of the peninsula gets more and more difficult to access because of increased traffic loads, it makes perfect sense to consolidate a new metropolitan node in the middle of the fastest growing and best-served real estate in the Western Cape.

Tygervalley already has thriving residential, corporate and retail components, attracting some of the largest, most dynamic property investments in the province. Besides its status as the de facto retail and service hub of the region, Tygervalley already boasts a number of impressive corporate headquarters, and large, thriving residential estates. In addition, its easy proximity and access to the N1 means that not only is Cape Town 20 minutes away, but nearby Stellenbosch, Paarl and Franschhoek are at least 20 minutes closer.

The Galleria taps into a growing international trend for destination creation, urban revision, and holistic spatial integration. It is set to transform the Tygervalley hub from a vehicle-dominated collage of unrelated, independent developments into a pedestrian-centric,

human-friendly, integrated neighbourhood.

The retail portion of the development forms a central spine that ties the various precincts together and forms a focal point for the entire development. The mall will be at the cutting edge of technology and retail design and will be aligned with the latest international trends and developments.

**The first phase of the scheme will consist of:**

- Retail mall area of approximately 33 700m<sup>2</sup>
- 5 levels of parking and 2 825 undercover parking bays
- 200-room 4-star business hotel
- Complete reconstruction of the Velodrome to a world class multipurpose events arena

A number of major roads in the area will be upgraded, extended and linked up to nearby arterial feeder roads. Working in conjunction with all relevant transport authorities and

specialist engineers, a multi-phase blueprint has been adopted that will optimise all bus, car, taxi and bus access routes, ensuring a smooth entry and exit from all directions. Included in the planning is an integrated Rapid Transport System with its own dedicated lanes and one-fare, cross-platform ticketing.



## CONSTRUCTION UNDERWAY



**Parow Centre - Phase 3**

**Value: R1 billion**

The Parow Centre mixed use development consists of three phases, two of which have been completed. Phase 3, the proposed residential development, will be completed by December 2022. The project spans 1.8 hectares. The centre will be transformed into a mixed-use development, with R250 million already committed to the Phase 1 renovations and extensions which commenced in 2019. It is expected to include 1 200 residential units and add over 40 000m<sup>2</sup> of space.

**Stellenbosch University Biomedical Research Institute**

**Value: R1 billion**

Construction commenced in January 2019 and is set to be fully operational by January 2023. The building comprises new research laboratories, a bio repository, conference facilities and a bioinformatics hub, built to high sustainable standards.

## PLANNED



**University of Stellenbosch BellPark Hospital Precinct**

**Value: R250 million**

The University of Stellenbosch is planning to develop a new 30 000m<sup>2</sup> 250-bed hospital precinct. A new access road will be developed to provide access to the hospital precinct off Carl Cronje Drive. The entrance, parking areas, sidewalks and external public spaces will be upgraded, and a covered walkway will be extended to the main hospital entrance. Once completed, the facility will offer a 24-hour emergency service.

**Blanckenberg Student Housing**

The proposed building provides a total of 2 592 beds designated as student accommodation along with ground floor retail space. This development will respond to the urgent need for student housing in the area.

**Goodwood Social Housing Project**

**Value: R380 million**

Construction is underway at a R380 million social housing investment providing 1 065 rental housing units on a site parallel to Goodwood train station, targeting household incomes between R3 500 and R15 000 per month. The housing will comprise six-storey apartment blocks on both sides of the railway line, offering units ranging from bachelor's flats to two-bedroom flats. The project is a partnership between the City of Cape Town, the Western Cape Government's Department of Human Settlements, the social housing institution DCI Community Housing Services, PRASA, Intersite Asset Investments and the National Housing Finance Corporation.

**Glenhaven - Urban Status Rentals**

**Value: R190 million**

Glenhaven is a social housing development by Urban Status Rentals (previously Devmark) located in Bellville South. The City's Glenhaven project consists of 512 social housing opportunities as well as 253 gap rental housing units.

“

*When completed, the new Biomedical Research Institute will form a fully integrated, future-focused and superbly organised research complex that matches and, in several ways, exceeds the best the world has to offer in terms of technical sophistication and optimised workflows in a healthy, inspiring and sustainable learning, working and public space.”*

– EBEN MOUTON, SENIOR DIRECTOR: BUSINESS MANAGEMENT AT STELLENBOSCH UNIVERSITY'S FACULTY OF MEDICINE AND HEALTH SCIENCES

**Anchorage, Glenhaven - Urban Status Rentals**

**Value: R200 million**

Construction of the Anchorage Social Housing Project commenced in October 2018 and has a total of 512 social housing units. The first phase of social housing consists of 416 apartments arranged in four-storey walk-ups in five buildings. To date, 209 of the completed 416 units as part of the first phase are occupied. The second phase consists of a single four-storey building of 96 units.

**Bellville Velodrome Galleria**

**Value: R3 billion**

A pedestrian-centred mixed-use neighbourhood that forms a vibrant new urban hub, a central destination in Cape Town for business people, corporations, retailers, events organisers, consumers, tourists and locals.





# EDUCATION

## A FIRST-CLASS PLACE TO LEARN

### KEY FACTS

Education is strongly tied to development. Students form a pipeline of talent for industry. Bellville attracts students wanting to study at leading academic institutions, and retains them as they launch careers with corporates and industry in the area.\*



#### Best student city in Africa

100 000+ enrolled students  
120+ educational facilities

#### African student city

Recognised globally as an academic destination for local and international learners

#### Vibrant and multicultural

12+ languages spoken

#### Geographically concentrated

81% of the area is within a 1km walking distance to a place of education. Over 120 education facilities are concentrated here, with 9% tertiary facilities

#### Major investments in local infrastructure

Billions of rands invested in broadband connectivity and infrastructure since 2009

#### New developments

R1 billion in new facilities being built

#### Affordable

Students can enjoy a high quality of life

## WHY COMPANIES INVEST IN BELLVILLE'S EDUCATION SECTOR

### EDUCATIONAL EXCELLENCE

Three out of four Western Cape universities are located in the Bellville area:

- University of the Western Cape (UWC)
- Cape Peninsula University of Technology (CPUT)
- University of Stellenbosch (UoS)

Out of 26 South African universities and technikons, they account for:



With the University of Cape Town (UCT), collectively, these institutions produced 8 442 research outputs in 2019 and procured over R1 billion in research grants.

CPUT, UWC and UoS are globally recognised for their advancements, boosting the city's innovative reputation. The latest release of the QS World University Rankings has added UWC among the top 1 000 universities worldwide (and ranked it as 139 in BRICS) – again.

UWC is also the only South African university to have been ranked among the world's top 200 higher education institutions in the very first Times Higher Education University Impact Rankings 2019, recognising its academic freedom policies, efforts towards gender equality and taking action against climate change. UWC and CPUT host a wide range of sporting facilities including stadiums, fields, Olympic-sized swimming pools, courts and pitches, many of which are open to the public.

“

Our placing in these rankings has not happened by chance – it is a testament to the significant strides we have made in terms of our research output. We have produced world-class research into everything from astrophysics to food security to visual history, and creative students and staff who've developed brilliant apps, built successful businesses or written bestselling novels, to name just a few. And we will continue to grow our impact. As a previously disadvantaged institution, the University of the Western Cape has made significant strides in a very short period of time.”

– PROFESSOR TYRONE PRETORIUS, UWC RECTOR AND VICE-CHANCELLOR.







### ***Vocational and skills training***

Institutions such as Northlink College offer skills-based training and education programmes. Northlink is a nationally registered Technical and Vocational Education and Training (TVET) college. Enrolment numbers there have grown from 4 000 in 2008 to 20 000 in 2017. The college provides relevant, accredited education and training and is recognised as a 'Centre of Specialisation' in Millwright and Fitter & Turner.



### ***Innovative partnerships between technology and universities***

Stellenbosch University and the University of Cape Town co-invested in the newly established R150-million University Technology Fund (UTF) – a first for the continent of Africa. UWC, UCT and UP have formed the Inter-University Institute for Data Intensive Astronomy (IDIA) to respond to the big data challenge of the Square Kilometre Array (SKA) radio telescope project.



### ***Education fees***

UWC has on average lower tertiary fees for a broader spectrum of students. CPUT has lower fees on average for degrees in information technology and engineering. For a Bachelor of Arts in design and degrees in graphic design, CPUT charges less than half of what is charged at private colleges. Northlink College offers diplomas in hospitality and educare that cost around half of the fees charged at technikons and other colleges.



### ***Affordable student accommodation***

The Bellville area is one of the most affordable metro areas for student rentals. Average price for student accommodation per month:

Bellville	R3033
Parow	R4550
Cape Town	R6400
Claremont	R6780
Braamfontein	R4363

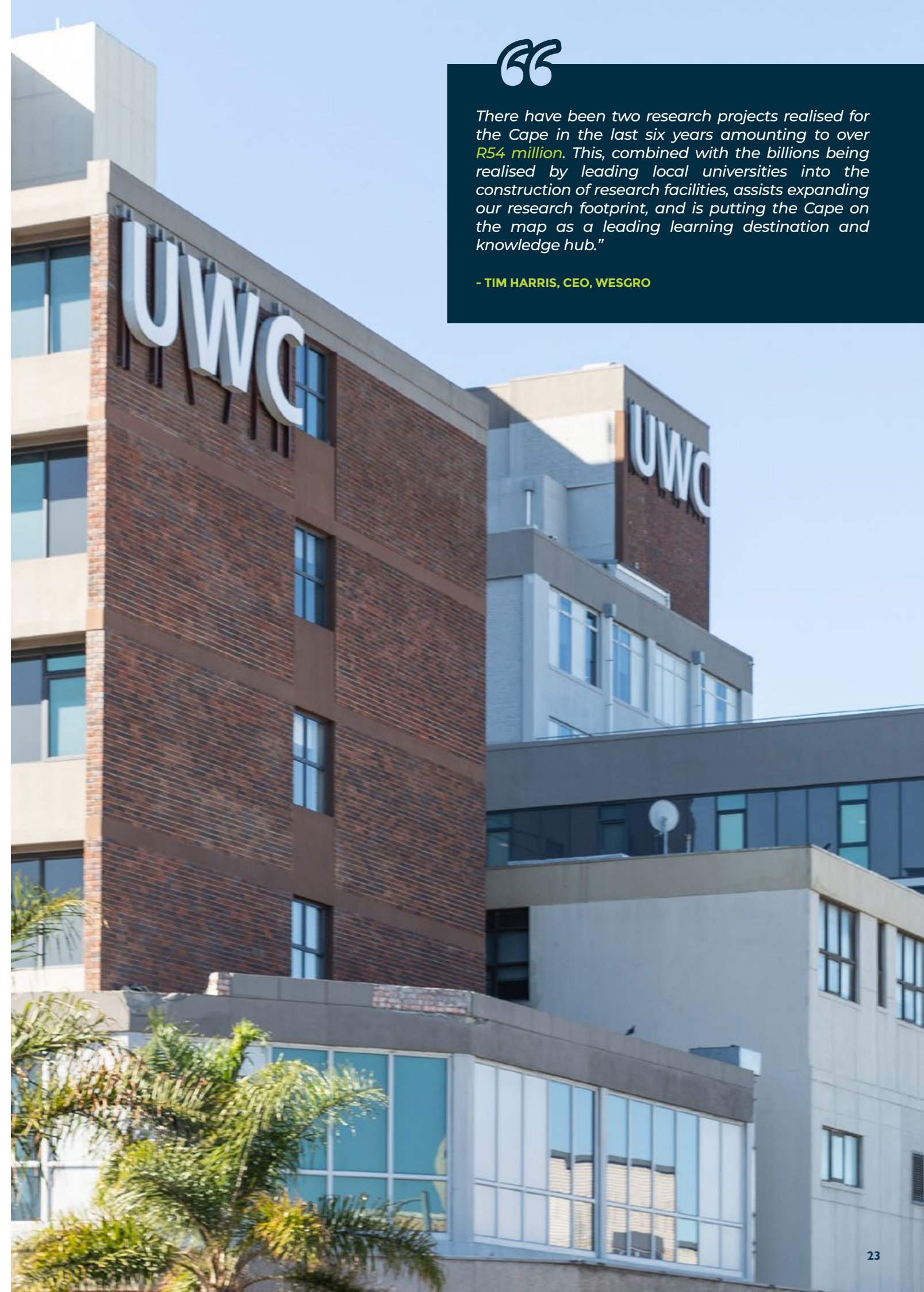
Schools and other education facilities support a growing population and maintain property values. Existing amenities like sports fields and libraries benefit children living in new affordable accommodation developments. With over 5 000 students living in 24 major tertiary student residences both off- and on-campus, there is massive potential for investors to tap into this accommodation market.

\* GTP Sector Research Programme, June 2020



There have been two research projects realised for the Cape in the last six years amounting to over **R54 million**. This, combined with the billions being realised by leading local universities into the construction of research facilities, assists expanding our research footprint, and is putting the Cape on the map as a leading learning destination and knowledge hub."

**- TIM HARRIS, CEO, WESGRO**



## **INTERNATIONAL STUDENT HUB**

Students from all over Africa come to study in the Bellville area, with the highest concentrations from:

Democratic Republic of Congo  
Zimbabwe  
Angola  
Namibia  
Gabon  
Nigeria  
Republic of Congo  
Cameroon  
Rwanda  
Lesotho







# HEALTH AND MEDICAL INNOVATION HUB

## ONE CENTRE CARING FOR THOUSANDS

### KEY FACTS

The Western Cape has one of the highest concentrations of medical device and healthcare companies in the country.\*

**53% of the Western Cape Department of Health's budget is spent on health infrastructure.**

#### R600 million

Foreign direct investment into South Africa's medical devices and pharmaceuticals sector, in the last 10 years

#### R400 million

Spent by Western Cape government on healthcare infrastructure, in the last 10 years

#### R1.7 billion

Contributed to the Western Cape economy by the health technology sectors

### WHY COMPANIES INVEST IN BELLVILLE'S MEDICAL SECTOR

**18 000** the number of people employed in this sector

**904** the number of specialised medical practitioners in this sector

**2 894** the number of hospital beds

**50 000** the population supported by the Greater Tygerberg hospital system



Tygerberg Hospital is the medical anchor tenant in Bellville. It is the second largest hospital in South Africa with capacity for 1384 beds, employing approximately 10 000 workers on the hospital grounds during a normal working day. Several secondary, specialist health and wellness services also operate around the complex. This has a clustering effect, strengthening Bellville as a medical hub and attractive health innovation and investment location.

#### 6 main hospitals

- Tygerberg Hospital
- Melomed Private Hospital
- Louis Leipoldt
- Mediclinic
- Stikland Psychiatric Hospital
- Karl Bremer
- Cape Eye Hospital

#### 5 medical and health institutions

- Stellenbosch University Health Science Faculty
- UWC Faculty Of Community & Health Sciences
- CPUT Faculty Of Health & Wellness Science
- South African Medical Research Council
- Council Of Health Service Accreditation South African Herbal Science & Medicine Institute

#### Health and wellness industries

- Rehabilitation centres
- Care homes & facilities
- Clinics
- Medical supplies
- Health spas
- Medical staffing agencies
- NGOs
- Nursing Trade Unions
- Medical apparel suppliers
- Research organisations
- Laboratory services
- Ambulance services

#### Fields of expertise

- HIV
- Tuberculosis
- Cardiovascular disease
- Oncology
- Women's health
- Genomics
- Health technology
- Biomedical research

### HOME TO VITAL ORGANISATIONS, GOVERNING BODIES AND GLOBAL HEALTH CORPORATIONS

#### African Genomics Centre

First facility on the African continent dedicated to conducting large-scale studies on whole genome sequencing.

#### Cipla Corporation

One of the country's leading pharmaceutical companies producing world class medicines at affordable prices.

#### The South African Medical Research Council (SAMRC)

The SAMRC has a mandate to improve health of the country's population through research, development and technology transfer. Its main areas are tuberculosis, HIV/AIDS, cardiovascular and non-communicable diseases.

#### SAMRC innovations, awards and investments

The Bongani Mayosi National Health Scholars Programme has produced 47 graduates (87% of which are PhDs) in various health professions.

The Healthy Life Trajectories Initiative brings together teams and funders across the world to test interventions to prevent obesity and associated metabolic disorders to inform national policy.

SAMRC/UCT Drug Discovery and Development Research Unit is Africa's first integrated drug discovery platform translating basic science knowledge into potential innovative new medicines for malaria, tuberculosis and antimicrobial resistance.

\* GTP Sector Research Programme, June 2020



## HOME TO INNOVATIVE AND ESTABLISHED HEALTH FACILITIES

Cipla

MEDICLINIC



M E L O M E D  
PRIVATE HOSPITALS



JASON FALKEN

CEO, Tygerberg Hospital Children's Trust

The Tygerberg Hospital, which is the second biggest in Africa, was built in the 1970s and today is served by a superior, dedicated team of medical and nursing staff. While its structure is strong, its infrastructure is showing its age.

The Hospital has plans for a R2 billion upgrade of maintenance and remedial works to be undertaken over the next ten years. This will carry significant benefits to patients in the future, but there is much work to be done for patients using the facility today.

The current focus for the Hospital is to deliver R100 million in infrastructure projects, which includes cosmetic fixes such as paint jobs and new gardens, but also more substantial improvements including the creation of safe and suitable breastfeeding spaces for new mothers, upgrades to the oncology unit, and the construction of new overnight parent accommodation and a psychiatric ward.

Located on the edge of the Bellville CBD, the Hospital has a unique role to play in supporting the healthcare sector in the area. It also has a strategic position in terms of the growth and development of Bellville as an urban centre.

Over 60% of primary health care patients from across the Western Cape are referred upward to the Hospital. With 1 384 beds, as a norm, the Hospital runs at 80%-90% capacity at all times. Its massive footprint directly supports around 10 000 jobs, as well as hundreds of indirect jobs through the ancillary healthcare businesses in Bellville that feed from its patient flow. Many of these patients arrive using the

public transport modes that transit through the Bellville public transport interchange.

It is almost impossible to separate health care from social development. If a community is characterised by poverty, social decay and crime, the pipeline of upward referrals will only increase, placing even greater pressure on the Hospital's capacity to deliver outstanding care for each patient. In just one practical example of that, at the Hospital, we are dealing with the highest rates of paediatric tuberculosis in the world. This is a social disease, borne in communities rife with poverty, inequality and unemployment.

What's the solution? Either we build bigger hospitals, or we treat the problem at source, by improving conditions in rural and urban areas. This is why we whole-heartedly support the efforts to attract investment and development into Bellville. First, because healthy cities mean better healthcare for all. Second, and more importantly, we play a crucial role as a social impact partner for businesses in the area. We believe in building collaborative partnerships, and our proximity to Bellville's business and academic environment helps us to maximise those partnerships with mutual benefits for everyone.

The key to many of South Africa's social ills is to consider how the public and private sectors can come together to drive social impact as a lever for job creation, development and growth. Investment on its own is not the answer. Bellville as an economic node has all the ingredients to create those public-private partnerships built on a desire to make a tangible social impact.

Through these partnerships, we are able to help Bellville's businesses do just that while also contributing to the upliftment of the Hospital. It is a relationship of mutual synergy that we actively nurture. For local businesses with a long term corporate strategy, it's in your benefit to have healthy beneficiaries of your service.

The combination of rapid urbanisation, the relentless spread of the coronavirus pandemic and protest events across the country have strengthened our resolve to drive this point.

More broadly, there is a need for local communities to become actively involved in growing the economy. At the same time, there is an equal need for corporates to turn their priorities towards investing their profits into those communities. The exchange of value required is no longer about dividends and profits, but investing for social good.

The best outcome of that is the creation of shared value. In this instance, Bellville's businesses can derive advantages of reach, tax incentives and expanded consumer base through their collective commitment to supporting the anchor institution in Bellville's thriving healthcare sector. Now is the time to open up the multiple unexplored opportunities to do that, for the benefit of the sustainable development of Bellville and its people – and for those from outlying areas who rely on the world-standard healthcare we can offer every day.



# MANUFACTURING

## A PRIORITY SECTOR

### WHY COMPANIES INVEST IN BELLVILLE'S MANUFACTURING SECTOR

### COMPETITIVE RENT FOR INDUSTRIAL SPACES

The rental price for industrial property in Bellville is, on average, R10/m2 less than industrial properties in and around Cape Town. Bellville also offers excellent transport connectivity and port infrastructure for exporting to the rest of Africa and beyond.

### HIGH POTENTIAL ACROSS AFRICA

Bellville's large land parcels and warehousing options provide opportunities for multinationals to set up light manufacturing, packing, processing, assembly and distribution. The availability of large scale warehouse parks allow for logistics and manufacturing clusters to form. This facilitates intra-regional trade. Warehousing helps businesses distribute more efficiently, reducing capital costs.

### KEY FACTS

25%

of Cape Town's gross value added (GVA) comes from manufacturing in the Tygerberg area.

22%

of all employment in the City of Cape Town is concentrated in the Tygerberg area (CoCT, 2019)

15%

of all jobs in the Tygerberg area come from the manufacturing sector (CoCT 2019)

3.2%

of all employment in the Western Cape comes from manufacturing in Tygerberg (CoCT, 2019)

141+

manufacturing and production companies are located in the Tygerberg area

2

manufacturing is Western Cape's 2nd largest industry.\*

A selection of manufacturing concerns located in Bellville:



“

The new on-ramp to the R300 means easier and quicker access to the N1 and N2, large power supplies and close proximity to Cape Town International Airport. New, modern warehouse developments create better road networks and infrastructure. South Africa's larger property funds have invested and developed in the area which should encourage potential investors to follow suit. Big new developments such as the redevelopment of Sans Fibres to Megawatt Park, Equites Mill Road development, Growthpoint Mill Park development and City Logistics development indicate that this area is a good place for businesses to be in the future. Areas like Bellville South are on the rise and we predict a significant increase in industrial and real estate development once stakeholders realise their profitability.”

- CLINT MARAIS, GALETTI CORPORATE REAL ESTATE

Leading manufacturers in Bellville:







## SPOTLIGHT ON CUTTING-EDGE BIOTECH MANUFACTURERS

### *Cape Bio Pharms*

Commercialising the biotech developed by the Biopharming Research Unit (BRU) at University of Cape Town (UCT) for the production of recombinant proteins in *Nicotiana benthamiana* plants.

### *Medical Diagnostech*

Manufacture high quality rapid diagnostic test kits for increased sensitivity and early detection. Ashley Uys, the founder of Medical Diagnostechs, has been recognised and honoured with many innovation awards

### *Ti-TaMED*

Manufacturing company that specialises in high precision engineering with titanium and other materials such as specialised stainless steels, aluminium and high performance polymers. The close proximity to the universities in the area allows for easy access to innovative R&D projects.



## NOTABLE DEVELOPMENTS IN BELLVILLE'S MANUFACTURING SECTOR

### *Albany Bakery*

- R350 million expansion to Albany Bakery
- Interior upgrade for the existing bakery
- Building of a new plant with lower carbon footprint and a significant boost in production efficiency
- New bakery occupies 6 884m<sup>2</sup> compared to the old facility of 3 766m<sup>2</sup>.
- New bakery will double output capacity through improved technology and high-tech internal systems.

### *WearSA incubator*

- Launched in 2019 with UWC
- Retail clothing store that serves as the first design and entrepreneurship incubator store in South Africa. Students have access to a space that focuses on the growth, development and knowledge of the local manufacturing industry
- Pioneering concept to promote local procurement and local jobs and provide practical entrepreneurial development skills to students

### *Twinsaver Group*

- Twinsaver Group is the leading manufacturing of tissues in South Africa, and is a major exporter of products throughout Africa.
- Invested R80 million at their Bellville factory in August 2016
- Completing phase 1 of a series of upgrades and investments worth R580m
- Invested in machinery to double production and create additional employment across the tissue value chain.

\* GTP Sector Research Programme, June 2020





# LOGISTICS

## BELLVILLE AS GATEWAY TO THE WORLD

### KEY FACTS



73+ logistics, transport and distribution companies\*

31%

of all industrial property is located the Tygerberg region

22%

of employment in the City of Cape Town is in the Tygerberg region; the second highest employment hub in the city (CoCT 2019).



16/22 Tygerberg suburbs are already zoned for commercial/industrial activity (Lightstone Property Review, 2018)



8km from Cape Town International Airport



20km from Cape Town Port

### WHY COMPANIES INVEST IN BELLVILLE'S LOGISTICS SECTOR

#### Gateway to Africa's GDP

South Africa has sophisticated road, rail and air infrastructure, facilitating business linkages to high-growth markets in the region and continent. Bellville is strategically located on these road, rail, air and sea networks specifically for moving goods within Africa and the world. Bellville is also well located to provide logistics for e-commerce and other business activities within the local Cape Town market.

#### Qualified workforce of employees and university hub

With over 73 logistics companies located in the Bellville area, there are many employment opportunities available, in a wide range of fields. Around 100,000+ university students are enrolled in the area, at three major world-class universities and several training colleges.

#### Industrial centre

New warehouses and industrial developments are rising across eight prominent industrial hubs.

#### Major investments in logistics infrastructure

Billions of rands have been invested in broadband connectivity and road infrastructure since 2009.

#### Strong ecosystem of companies

Bellville's infrastructure is geared toward logistics, with manufacturers and distribution centres clustered in the area.

#### Cost advantages

Bellville has the fifth lowest logistics operating costs compared to 15 of its global city peers.

#### Infrastructure upgrades

A well-connected commercial rail system connected to the major Belcon Container terminal in Bellville, with 350m tonnes of freight moved to or from Cape Town port every year. In 2019, R1.5bn was invested in capacity creation and maintenance projects. Critical infrastructure investments are set to make Bellville one of the most connected and accessible areas in the city by 2032. This includes R2.4bn to modernise the MyCiTi bus rapid transit system.\*

\*GTP Sector Research Programme, June 2020

### A STRATEGIC LOCATION

#### High quality multi-modal infrastructure

- Ensures an efficient flow of goods within Africa and internationally
- Considered the "Gateway to Africa"
- Efficient and well-connected commercial and freight rail system located in Bellville

#### Africa's leading airport

- Cape Town International Airport
- South Africa's second-busiest airport
- Recorded 2,86 million total passenger movements in the first quarter of 2019
- It services between five and 11 million passengers annually.
- Boasts 38 international destinations

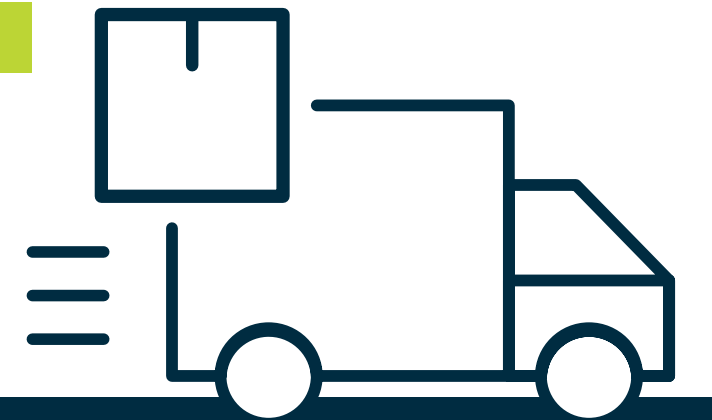
“

Many logistics companies are moving to the Cape. From Bellville, it's 25 minutes to anywhere. It's very popular with investors and demand keeps growing. The prices are similar to Cape Town but it's a newer area with newer buildings, good electricity, and much less congestion and traffic. In Cape Town your drivers will sit in traffic for two hours trying to get out. Bellville is much easier for distribution.”

- ANVIL COMMERCIAL PROPERTIES

#### Second busiest port in South Africa

- Located 20 kilometres from Bellville
- Cape Town container terminal is one of the best in the world
- Strategically located on one of the world's busiest trade routes
- Connected to Belcon container port via Transnet freight rail



#### Efficient freight rail system

- Well-connected commercial rail system
- 350 million tonnes of freight moved by rail, destined to or from Cape Town port and beyond.
- The Bellville Container terminal (Belcon) is a major container depot in Bellville
- R1,5 bn invested in capacity creation and maintenance projects during 2019

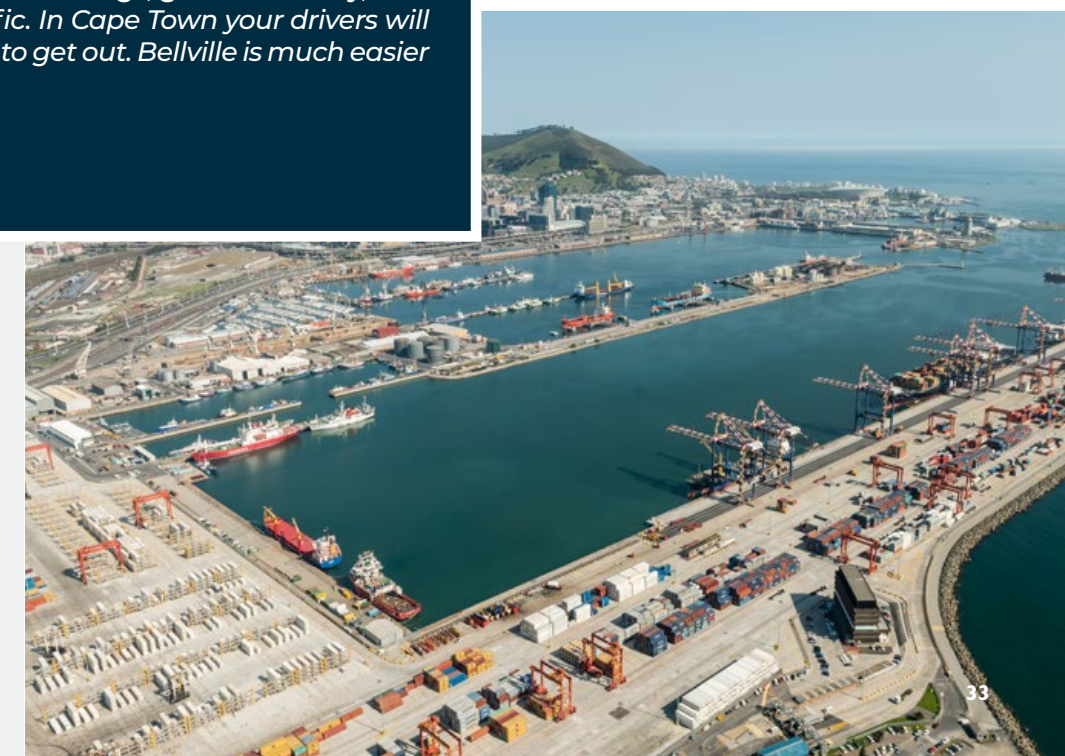
#### Cost effective location

The average rental price for industrial property in Bellville is R10/m2 less than the industrial properties in and around Cape Town.

“

“E-commerce fulfilment can require four times the warehouse capacity in the destination market compared to traditional logistics models. Also, through COVID-19 and other supply chain shocks, companies want to keep more inventory on hand, which means more demand for space. We expect strong demand for logistics space, from large storage hubs down through to small last-mile fulfilment centres in urban centres, to continue to grow in key regions.”

- TIM WHITE, PROFICA





# ANDREA TAVERNA-TURISAN

CEO, Equites Property Fund Limited

# 1

The emergence of last-mile delivery platforms is changing the way logistics operations are planned and built. Operators need larger sites to accommodate a larger quantum of loading bays to facilitate last-mile fulfilment. This configuration requires a greater emphasis on technology.

# 2

The speed of picking required to execute fulfilment is driving a revolution in the way that technology is applied to warehouse construction.

# 3

Outsourced business-to-consumer logistics is driving a shift in the movement of fast-moving consumer goods (FMCG). This means distribution contracts are based on fixed fees paid to distributors who move goods for multiple operators in the same loads.

**W**hile these three elements are drivers of change in our sector, one factor remains solidly in place: location. This is the most important requirement for successful logistics operators.

In this business, burning diesel costs money. Vehicles need to move in and out on time and without delay. Bellville offers a significant benefit in this regard, with connectivity by road, road, air and sea able to support the needs of logistics operators who need to move products into their distribution networks quickly and efficiently. Bellville South and Parow Industria particularly are prime logistics locations attracting clusters of major players in manufacturing, retail and industrial distribution. Our business is to build to a client's specifications. For sector developers to stay on top of their game, there is an associated need for approval processes to

move quickly through planning stages. In our experience of developing in Bellville, we have been helped by a pragmatic council whose administrators recognise the value of making decisions that will help rather than hinder development.

The combination of an evolving sector, with the right location, and administrative support is an attractive package for the right tenants seeking the best return on their investment. Bellville's offering supports those needs. We have been developing in and around the area since 2000 and we intend to continue to execute world-class developments in this node.





# RETAIL

## DIVERSE RETAIL OFFERING, DIVERSE CONSUMERS



Bellville is well-served by a number of diverse shopping centres and retail offerings located within bigbox shopping centres, suburban and community scale malls, a vibrant high street along Voortrekker Road, train station retail and independent and informal trading communities.

Big malls attract shoppers from across the region, as a one-stop destination for a wide variety of retail stores, restaurants, cinemas and entertainment. Tyger Valley Centre is the leading regional shopping destination in the Northern Suburbs. Operating since 1972, Parow Centre covers 86 000m<sup>2</sup>. The centre is the subject of a major upgrade into a transit-oriented mixed-use development. Middestad Mall was one of the first shopping centres to be built in the Western Cape, and caters to local residents and commuters. It is visited by about 850 000 shoppers every month.

Neighbourhood-scale shopping centres are convenient, smaller locations for local shoppers and residents. Nobel Park and Maalin Centre are both well-located within the Bellville CBD and near the train station, offering retail and office spaces for smaller businesses and outlets.

Located in the centre of the Bellville CBD, the Bellville PTI is one of the country's busiest multi-modal transport interchanges. Surrounding retailers benefit from extensive foot traffic in the area.

**Street frontage retail**  
Local shopping centres are supplemented by an active and vibrant high-street along part of Voortrekker Road. This has the added benefits of enlivening the neighbourhood, improving safety through passive surveillance and providing more accessible options for consumers without cars.

The Voortrekker Road Corridor stretches 17km west to east from Salt River Circle to Stikland Bridge. Voortrekker Road has always played a primary transport role in Cape Town. This road is truly mixed-use, characterised by light industry and car dealers, discount bulk retailers and large shopping centres, impressive office blocks, housing estates, schools, hospitals, parking lots, government offices and service centres.



### Street traders

Independent trading communities from across Africa provide additional retail options for diverse income groups and multicultural diversity. The informal sector is the fifth largest employer in Cape Town, offering good employment opportunities for traders, as well as affordable goods and services to locals. It is estimated that the informal economy contributes around 28% of South Africa's GDP.

59%

of informal traders have been operating in Bellville CBD for over 10 years

54.6%

agree that Bellville CBD is a prime location because of its proximity to customers

18.7%

consider reliable public transport as one of the reasons for doing business in Bellville CBD

Public sector infrastructure upgrades such as the Kruskal refurbishment help informal traders in Bellville to make an even greater sustained contribution to the city's and the country's economy.\*

\*GTP Informal Trading Survey 2019



*This uptake [in e-commerce] can be attributed to both the stringent hygiene measures now required in the workplace and the changing nature of retail. Many businesses have wisely capitalised on the increased reliance on e-commerce from consumers who are choosing to do their shopping from home, by discarding brick and mortar storefronts in favour of virtual ones. Other businesses have pivoted to focus on manufacturing Personal Protection Equipment (PPE), wisely anticipating the massive consumer demand once the wearing of PPE outside of the home was mandated by law".*

- CLINT MARAIS, WESTERN CAPE REGIONAL HEAD, GALETTI CORPORATE REAL ESTATE

### High foot traffic

A GTP study conducted in 2018 concluded that walking is the most efficient, convenient and well-used mode of transport within the Bellville CBD. This is despite the motorised traffic that moves through the centre. Pedestrianisation could add a rental premium of up to 50% over comparable vehicle-access sites. An area with high pedestrian flow-through will usually feel safer and more vibrant than an area with low pedestrian flow.

### Home to household brands



### Innovation in retail

E-commerce and online retailers are increasingly locating their warehouses in Bellville. While the COVID-19 global pandemic has negatively affected many of South Africa's vital sectors, e-commerce and online retailers have experienced an upsurge, which has had a positive impact on the industrial real estate sector. Both e-commerce retailers and personal protective equipment (PPE) manufacturers require distribution centres. Locations such as Bellville, Epping and others nearby the Airport Industria are identified as top contenders

E-commerce is the key driver of warehousing and logistics demand in Africa, with Nigeria, Kenya and South Africa leading the charge. According to McKinsey, African e-commerce has projected annual sales of \$75 billion by 2025.



# STRATEGIC LOCATION

## 2021 Bellville CBD: Retail by numbers

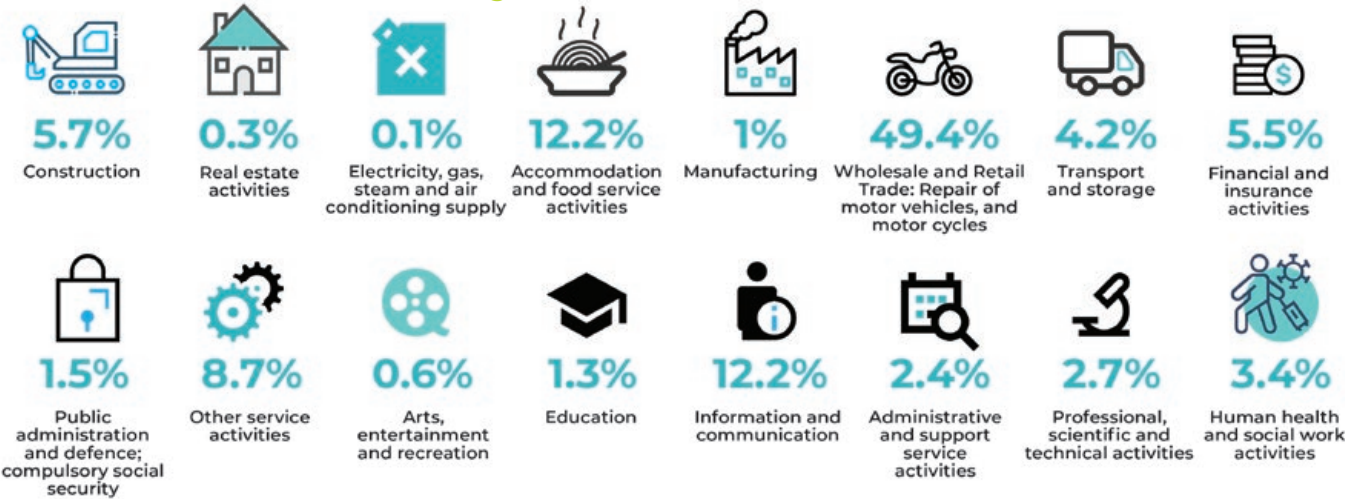
The Bellville Central Business District (CBD) stretches 1,2 square kilometres. During 2021, we conducted a survey\* to find out more about the retail and commercial activities that support the CBD as an active and busy commercial centre. We wanted to gain a better understanding of what activities take place there, including employment data.



### Business types in Numbers



### Percentages of Business in different sectors:



### Household brands located in Bellville CBD:

Shoprite | Clicks | Ackerman's | PEP | Truworths | Foschini | American Swiss | Markhams | Pick 'n Pay  
Sportscene | Jumbo | KFC | The Fix | Mr Price | Sleepmaster | Bradlows | OK Furniture | Lewis | Brito's | Footgear  
Choice Clothing | Toyota | Exact | Jet

\* GTP Retail Survey April 2021

Bellville has a vacancy rate of 5.8% and 40 000m2 available retail floor space. The largest increase in rental prices was found within Bellville CBD, with the Blanckenberg Street to Modderdam Road section increasing by an average of 209% between 2008 and 2017 and Durban Road to Blanckenberg Street increasing by 115%.

The surrounding Bellville suburbs enjoy an average income level of LSM 8 supporting a diverse range of retail offerings and retail consumers, reducing the risk to retail overall.

### Proximity to distribution centres

Warehousing, major distribution centre and industrial properties are well located between the airport, port and national highways.



## KEY RETAIL DEVELOPMENTS

### Shoprite

- Recently built Africa's most advanced distribution centre at Cilmor
- Massive hi-tech centralised storage centres enable the retailer to keep their prices low.

### Massmart

- In the process of building a 50 000m2 new distribution centre in Brackengate.
- Massmart is the second-largest distributor of consumer goods in Africa.

\*GTP Sector Research Programme, June 2020





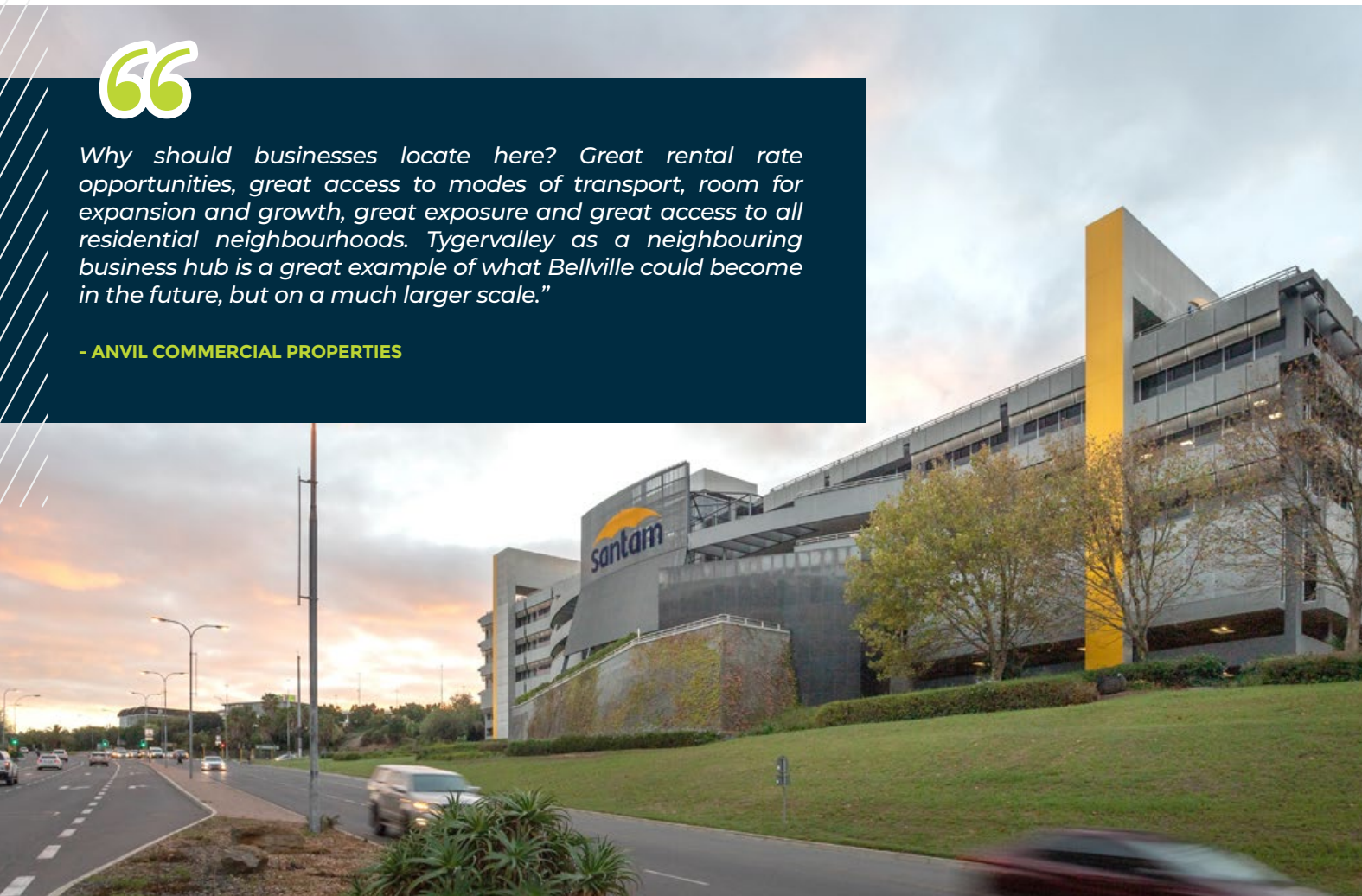
# COMMERCIAL

## A DIVERSE COMMERCIAL CENTRE

“

Why should businesses locate here? Great rental rate opportunities, great access to modes of transport, room for expansion and growth, great exposure and great access to all residential neighbourhoods. Tygervalley as a neighbouring business hub is a great example of what Bellville could become in the future, but on a much larger scale.”

- ANVIL COMMERCIAL PROPERTIES



## A STRONG AND GROWING METROPOLIS AND DYNAMIC LABOUR MARKET

Bellville accounts for 22% of the city's employment and is the second biggest jobs hub in the city. Centrally located, Bellville is an easier commute to the Cape Town CBD, Pinelands, Constantia, Stellenbosch and other main commercial hubs. There are over 4 000 companies located in the Bellville area, ranging from leaders in financial services and insurance such as Sanlam, to retail giants TFG and smaller tech and IT start-ups and professional services.\*



## BELLVILLE AS AN INNOVATION DISTRICT

Bellville has all the ingredients to become an innovation district for the region and the country as a whole. The high concentration of universities, education and research institutions make possible significant advances in research, particularly within the medical health and technology sectors. Graduates from these institutions create a pipeline of a large and growing talented workforce, who can access employment opportunities within industry leaders clustered in Bellville's industrial and commercial zones. This combines with well-established infrastructure and internet penetration, fast wifi speeds, as well as excellent logistics connections and strong, driven local governance.

The broader Cape Town area including Bellville is the digitech hub and startup capital of Africa. It is the leading location for tech start-ups and venture capital deals, and a technology leader in mobile software, revenue management and payment process sectors. Advanced IT infrastructure and innovative software developments have allowed e-commerce to grow at a rapid rate. Internet penetration is 63% and the city has one of the largest open-access fibre networks in Africa.



### Areas of innovation

- Fintech
- Agritech
- Healthtech
- Screentech
- Edtech
- E-commerce
- Greentech
- Traveltech
- Digital services

## CAPE TOWN IS THE START-UP HUB OF AFRICA

60%

of South Africa's startups

25+

co-working spaces

20+

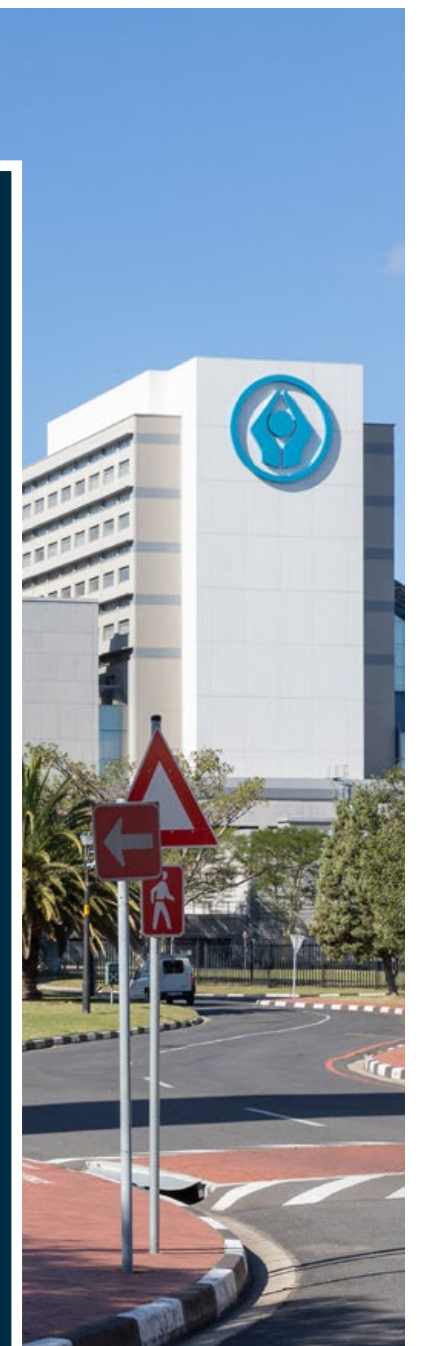
local and international accelerators supporting between 10 and 15 startups each year



715 free wifi spots around Cape Town city

50%

of SA's emerging tech companies









# BUSINESS PROCESS OUTSOURCING BELLVILLE ON CALL 24/7/365

## KEY FACTS

54 000

estimated BPO size in Western Cape

12 000

estimated BPO size in Greater Tygerberg area

22%

BPO operators in Greater Tygerberg Area vs Cape Town

3

known number of international operators

1 900

estimated headcount for international operators

16%

International headcount in the area

16

known domestic operators

10 100

estimated headcount for domestic operators

84%

Of domestic headcount in the area\*

\*GTP BPO Research 2019

## WHY BUSINESSES INVEST IN BPO OPERATIONS IN BELLVILLE

The Voortrekker Road Corridor is characterised by a large number of older buildings, specifically in the Bellville, Parow and Goodwood CBDs, with more found across the Greater Tygerberg Area. These buildings may not carry the same perceptions of stature suitable for housing corporate entities. This presents a significant advantage for Business Process Outsourcing (BPO) operators who can benefit from:

- large floor plates
- competitive property values
- available land
- access to the second biggest transport interchange in the Western Cape
- access to an educated English-speaking, affordable workforce
- cultural alignment
- stable, fast and sophisticated ICT infrastructure – in a January 2018 mobile data speed test, the areas of Goodwood (54 Mbps), Parow (51 Mbps) and Bellville (50 Mbps) were found to have the fastest speeds in South Africa – an additional benefit for BPO operations relying on stable and fast internet connectivity.

The City of Cape Town and Western Cape Government have identified the BPO sector as a tool for job creation and a lever to drive economic activity, which offers local and provincial endorsement for the growth of the sector. With their support, various development incentives exist, such as accelerated capital depreciation schemes and the urban development zone which offers tax incentives for building refurbishment projects.

## SELECTED EXISTING BPO OPERATORS

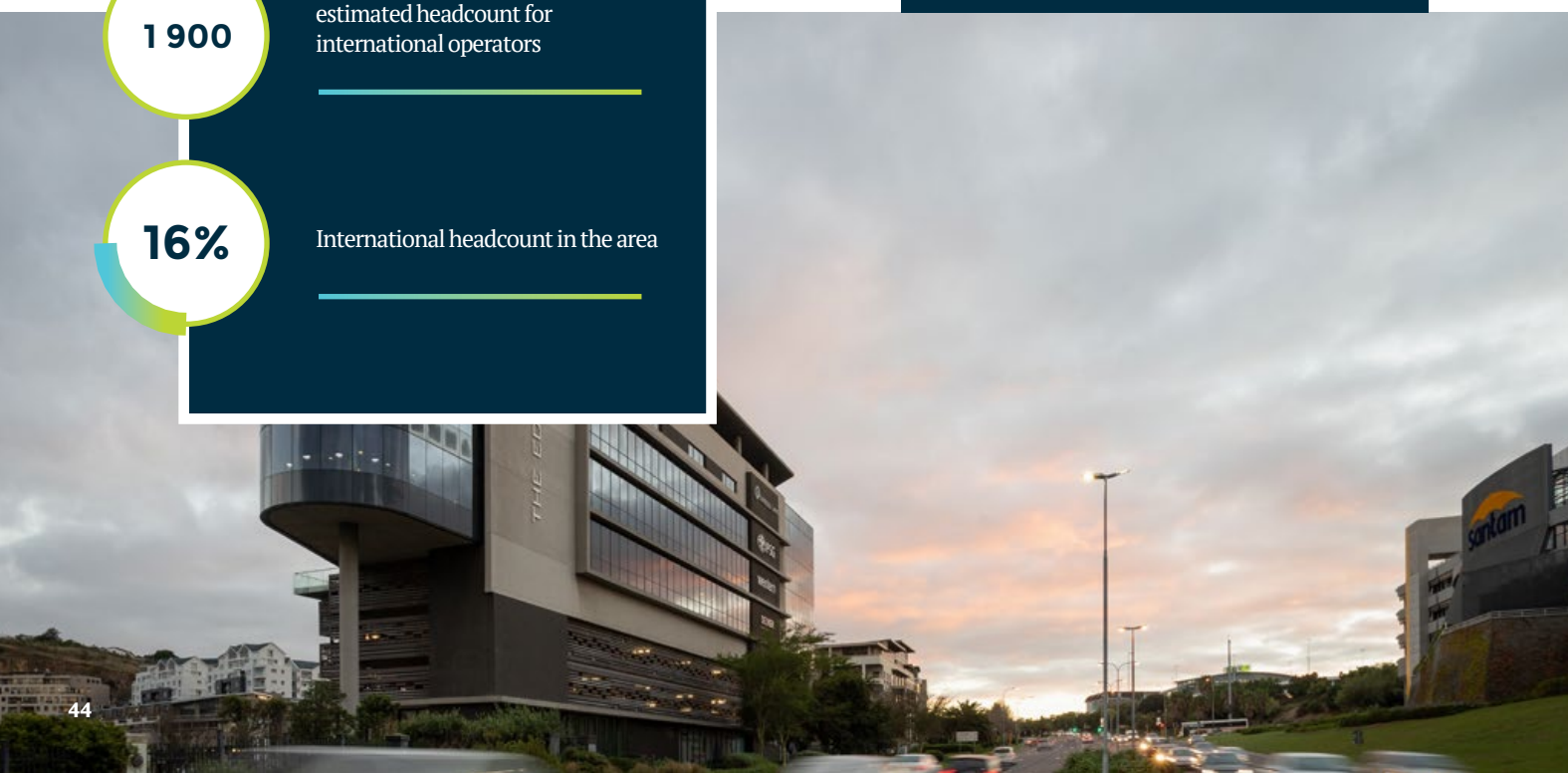


Capitec, one of the top five banks in South Africa, has BPO operations located in Bellville



Vodacom: launched a Social Media Command Centre in the Bellville CBD in 2018

\*GTP Property Research Programme 2021







CLAYTON WILLIAMS

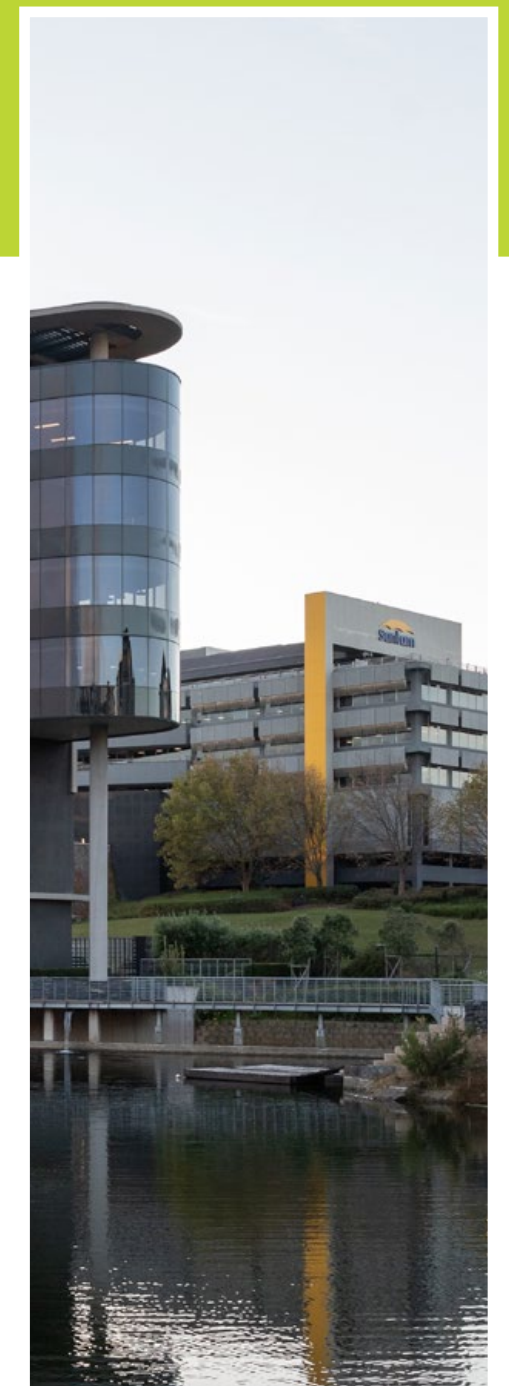
CEO, CAPE BPO

Typically, a BPO operator would be seeking fit-for-purpose buildings of around 3 000-7 000m<sup>2</sup> that do not require much customisation or capex investment. The plug and play model is most desirable. Stable and high-speed connectivity, close proximity to transport options for staff, proximity to a potential workforce and safe and secure surroundings are key for operators.

Like most industries, the BPO sector has seen some recent shifts that have given rise to a change in approach for operators. The COVID-19 pandemic has had a notable impact on the sector, with the reduction of in-office occupancies and a correlating activation of work-from-home capabilities for operators. That said, given the compliance requirements and potential client concerns before approving such a shift, these conditions have had a knock-on effect in limiting the ability for certain high-risk services to be delivered on-site. Operators have, however, been able to diversify the geographical situation of their operations to enable and support business continuity. This includes considering sourcing talent from multiple markets and using additional mechanisms for recruitment from within alternative profiles.

Bellville has a compelling value proposition in terms of being a potential international BPO operator hotspot. It certainly ticks the right boxes in terms of property, transport and access to talent. There are perceptions related to safety and security concerns based on historic degradation of certain areas within Bellville, but dispelling these perceptions is possible with the support of both public and private sector stakeholders that endorse Bellville as an economic zone that can offer access to world class facilities at scale.

At least 75% of the current demand being serviced out of the Western Cape comes from the United Kingdom. While the domestic market predominates the BPO sector in Bellville, international operator interest would most likely reflect the regional trend of attracting UK operators. A key strategic focus for Cape BPO is to extend market penetration within the United States. Bellville may represent a key location option for clients from that market.





# CULTURE AND COMMUNITY



**Social** community  
**Wellness Day**  
**Street Art**  
**Parks**  
**Market**  
**Outdoor Cinema**  
**Trail Run**  
**Open Streets**



## RESIDENTIAL SURVEY RESULTS

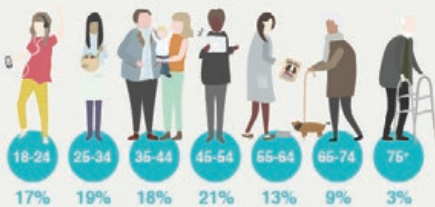
### LIFE IN BELLVILLE ONLINE SURVEY

The GTP conducted its first online residential survey\* to find out more about how people live, work and play in Bellville. In all, 181 respondents offered some valuable insights into their lifestyles and what they'd like to see improved.



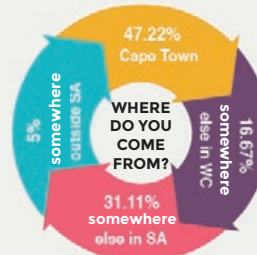
#### WHO ARE YOU?

##### HOW OLD ARE YOU?



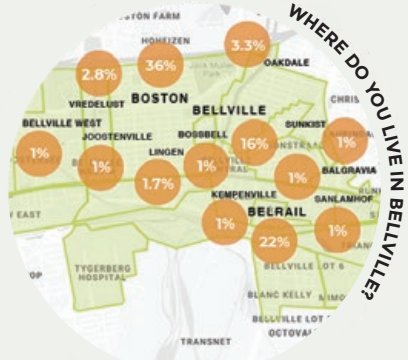
**24.8%**  
OF RENTING TENANTS  
WOULD CONSIDER  
BUYING IN BELLVILLE

##### HOW LONG HAVE YOU LIVED IN BELLVILLE?



**57.8%**  
HAVE  
CHILDREN

- 20.91% between 0-3 years
- 39.09% between 4-13 years
- 20.91% between 14-18 years
- 47.27% older than 18 years



**48.7%**  
HAVE PETS

#### WHAT DO YOU DO?



##### TOP 4 REASONS FOR LIVING IN BELLVILLE

1. Close to place of work/study
2. Close to schools & educational institutions
3. Easy access to other CPT neighbourhoods
4. Affordable area to live in

##### TOP 5 PROFESSIONS

- Financial sector (banking, accounting, investment, fund management)
- Computer & IT
- Education, training & libraries
- Government & public service sector
- Architecture & engineering

##### MONTHLY HOUSEHOLD INCOME

R0-R3K	R3K-R8K	R8K-R15K	R15K-R20K
17.34%	9.83%	10.40%	10.98%
R20K-R25K	R25K-R30K	R30K-R35K	R35K-
4.62%	6.36%	5.20%	8.9

##### NATURE OF OCCUPATION

49.4%	15.4%
FULL TIME	SELF-EMPLOYED
16.7%	10.9%
STUDENTS	RETIRED

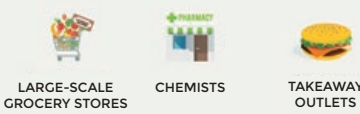
**62.4%**  
WORK OR STUDY  
IN BELLVILLE

##### HOW DO YOU GET TO & FROM WORK OR SCHOOL?



#### WHAT DO YOU NEED?

##### TOP 3 RETAIL VENUES



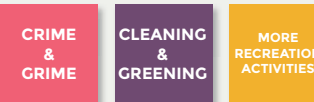
##### WHAT ACTIVITIES IN PUBLIC SPACES WOULD YOU LIKE TO SEE MORE OF?



##### WHAT TYPE OF PUBLIC SPACES WOULD YOU LIKE TO SEE MORE OF?



##### WHAT ARE THE BIGGEST CONCERNS IN BELLVILLE?

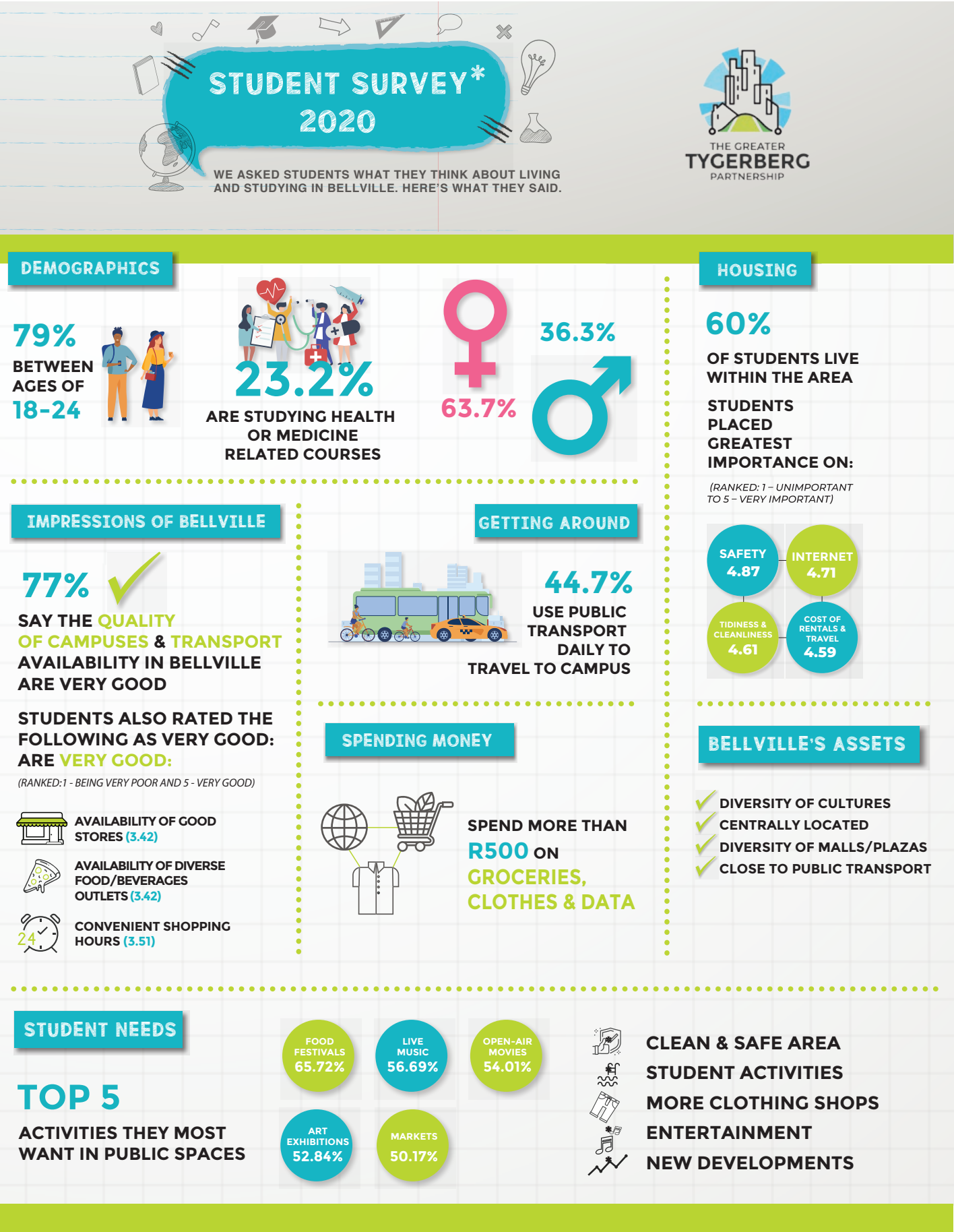


\* GTP Residential Survey 2020





# STUDENT SURVEY RESULTS





# ABOUT THE GTP

## EIGHT WAYS WE CAN MAKE IT EASIER TO INVEST

1

*Development and investment projects*

We help with facilitating, supporting and managing investment projects across all key sectors.

5

*Research and data services*

We undertake research and analysis, gather expertise, provide data and information.

2

*Property development facilitation*

We assist developers and those developing in the area to help understand and accelerate the development process and cycle from feasibility to plan submission.

6

*Business development support*

We facilitate and connect growing and small businesses to wider networks.

3

*Implementation partner*

From placemaking to innovation and community and stakeholder engagement, we help with delivery, viability and implementation of projects.

7

*Partnership support*

We provide targeted marketing and media support for investors in the area, reaching a B2B audience.

4

*Site-finding service*

Using our networks and the GTP algorithm, we identify greenfield or brownfield sites or precincts that are available and best suited to a proposed development project.

8

*Government relations and engagement*

Through our relationship with local and provincial government as well as government agencies, we help facilitate and build stronger relationships.



## CONTACT



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