DEMACON market studies

A New Edge to Market Research

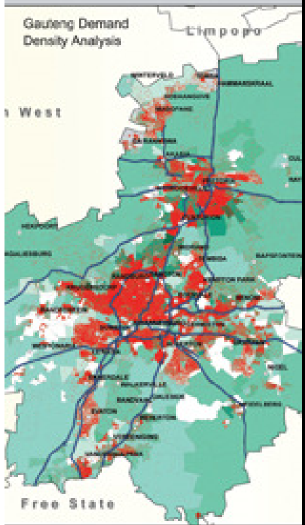
Real Estate Market Studies
- Retail
- Residential typology models
- Office
- Industrial
- Warehousing & distribution
- Tourism / Shortstay accomodation
- MICE activities

Real Estate and Fiscal Impact Analysis

Demographics Profiling & LSM Profiling

Customer In-store Surveys

Refurbishment & Remerchandising studies



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WEST RAND INDUSTRIAL STRATEGY

Second Progress Presentation – Industrial Nodes

June 2013

Contact Person: Hein du Toit

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PLAN

WEST RAND DISTRICT MUNICIPALITY

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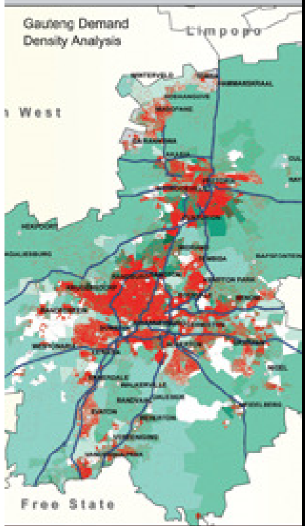

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PRESENTATION STRUCTURE

- Part 1 – Spatial Structure & Context
- Part 2 – Nodal Analyses
- Part 3 – Project Identification

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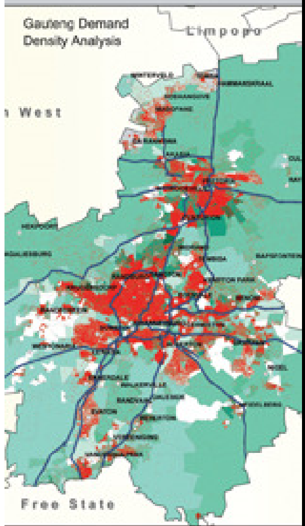

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PROJECT BRIEF

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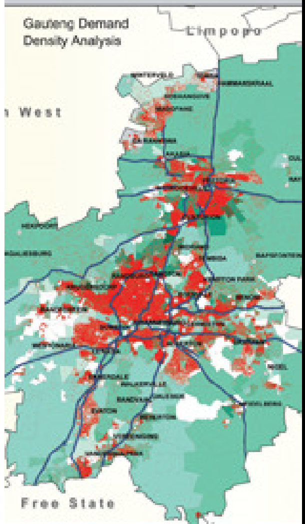

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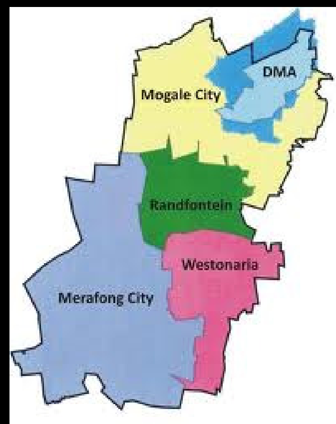
PROJECT BRIEF

- West Rand District Municipality requested proposals from service providers to develop an Industrial Development Strategy which will identify industrial / manufacturing opportunities available within the area, the type of public sector initiatives necessary for their realisation and also acts as a marketing tool to attract investors into the area.
- The objective is therefore to expand the manufacturing sector by increasing its production base, to ensure that the area reaches its industrial and related potential (including linking the West Rand with Rustenburg and the rest of Gauteng).

West Rand District in Context



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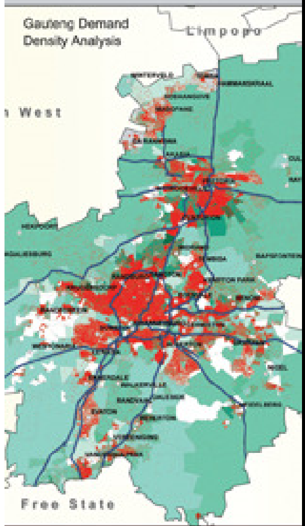
Refurbishment & Remerchandising studies



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PROJECT BRIEF – DELIVERABLES

Deliverables	Progress
❖ Market study on West Rand industrial market (obstacles and / or issues) – district and local economic analysis / demographic analysis, labour profile / employment profile etc. ❖ Register of all manufacturing industries within the district ❖ Strategic product lines for sustainable growth and support report ❖ Growth Points Analysis Report	100% Complete
❖ Draft and Final Industrial Development Strategy ❖ Value chain analysis report ❖ Support framework for revitalisation of dormant industries (proposal)	100% Complete
❖ Two bankable manufacturing business plans ❖ Industrial Incentive Scheme ❖ Implementation Plan for industrial stimulation over short, medium and long term, coupled to a Financial Framework	To be completed

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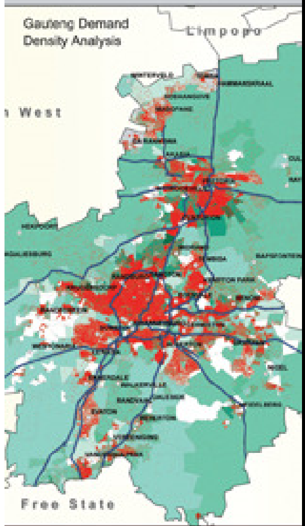

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PRACTICAL PROJECT INTERVENTION PRINCIPLES & CONSIDERATIONS

- Dream big, but remember: effective and successful projects are always grounded in **ECONOMIC REALITY** and **SOUND LOCATION PRINCIPLES**.

- Interventions focused on areas with **GREATEST ECONOMIC ENERGY** have the **GREATEST MULTIPLER / / LEVERAGE / CATALYST EFFECT** – and by far the greatest success rate.

- Project interventions need to be **PRACTICAL, SIMPLE AND UNDERSTANDABLE**. Local authorities should stick to basics. Cluster programmes are dynamic, but even national governments struggle to maintain momentum. Create an **ENABLING ENVIRONMENT** and the **MARKET WILL FOLLOW**. Make it too complex, and the market will not respond.

- Assimilation - Industrial development is associated with what is known as **PASSIVE ASSIMILATION**, i.e. the geographic part of a town or city characterised by slower growth and expansion rates. Industrial interventions take time to take effect.

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A New Edge to Market Research

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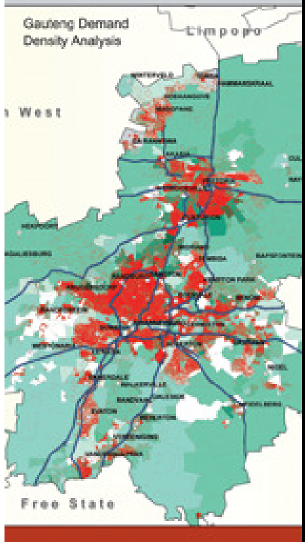

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❖Part 1

SPATIAL STRUCTURE & CONTEXT

A New Edge to Market Research

Real Estate Market Studies

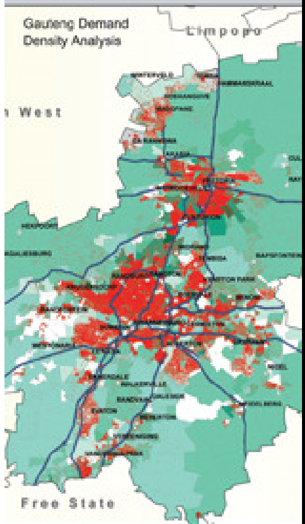
- Retail
- Residential typology models
- Office
- Industrial
- Warehousing & distribution
- Tourism / Shortstay accomodation
- MICE activities

Real Estate and Fiscal Impact Analysis

Demographics Profiling & LSM Profiling

Customer In-store Surveys

Refurbishment & Remerchandising studies



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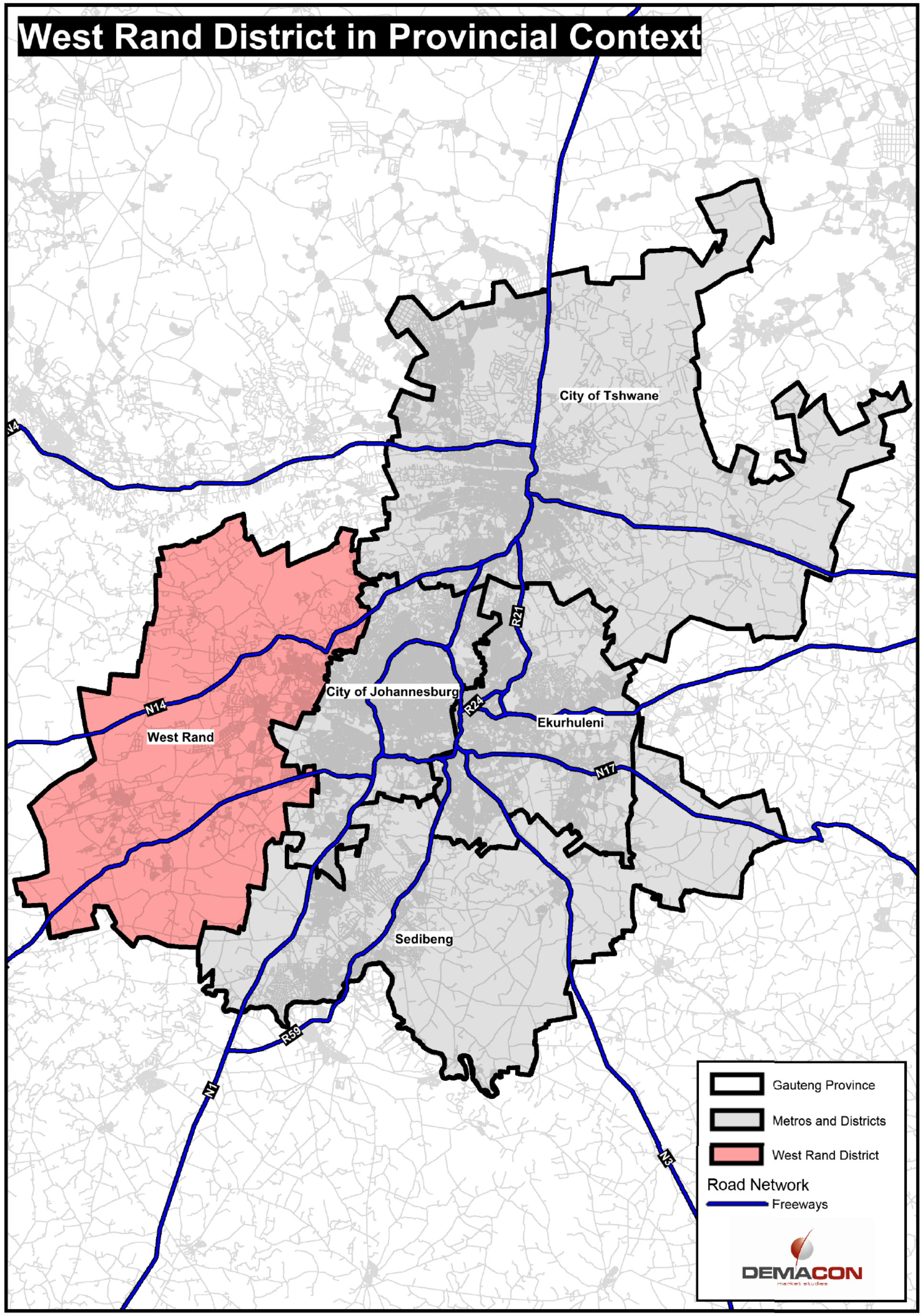
PROVINCIAL CONTEXT



DEMACON market studies

A New Edge to Market Research

Real Estate Market Studies

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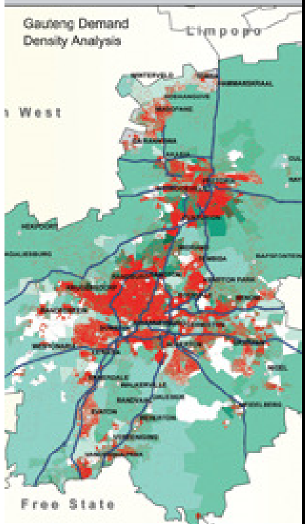
Real Estate and Fiscal Impact Analysis

Demographics Profiling & LSM Profiling

Customer In-store Surveys

Refurbishment & Remerchandising studies



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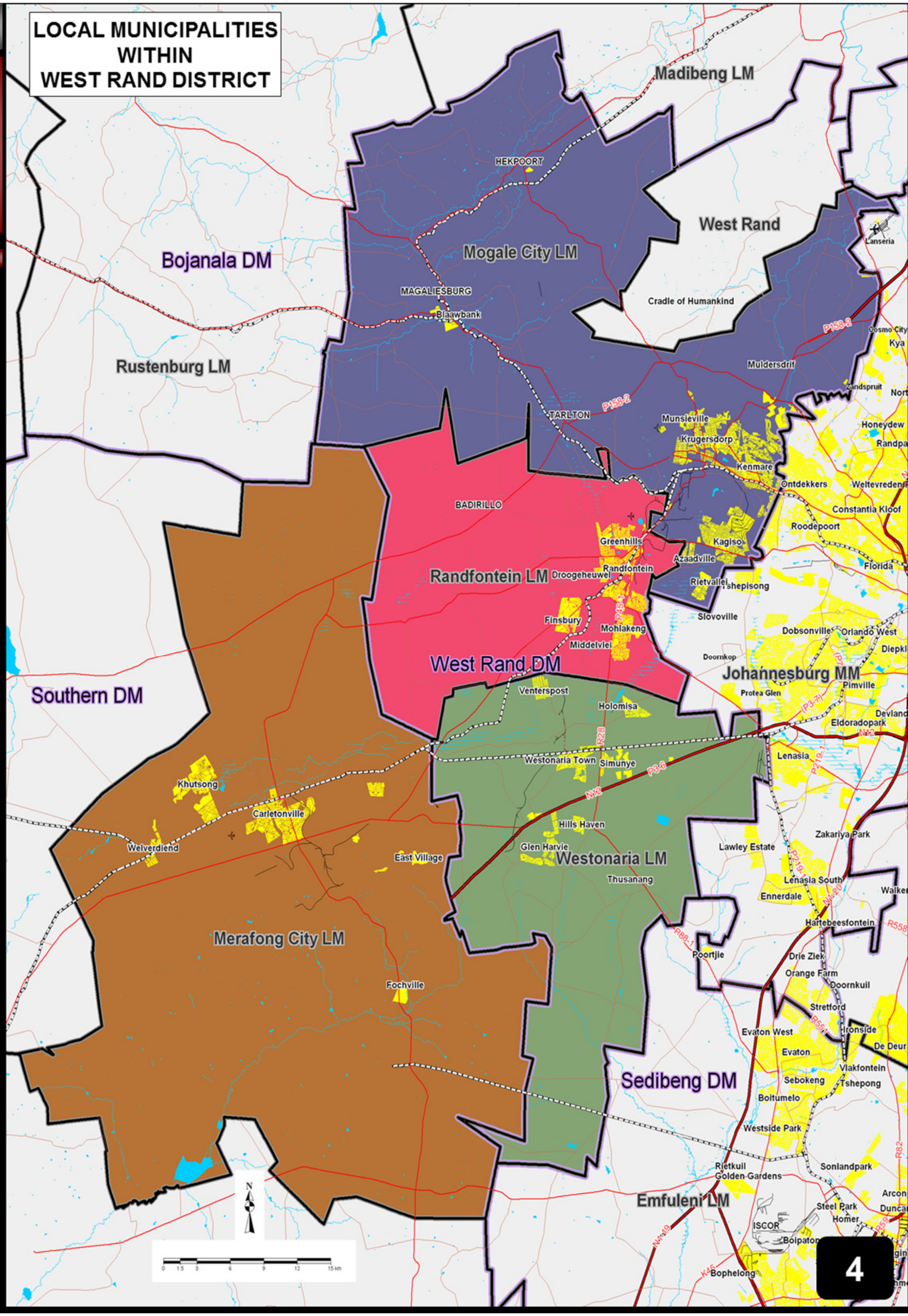

DEMACON market studies

A New Edge to Market Research

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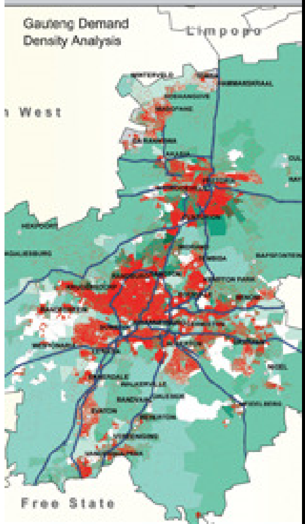
  - Retail
  - Residential typology models
  - Office
  - Industrial
  - Warehousing & distribution
  - Tourism / Shortstay accomodation
  - MICE activities
- Real Estate and Fiscal Impact Analysis
- Demographics Profiling & LSM Profiling
- Customer In-store Surveys
- Refurbishment & Remerchandising studies



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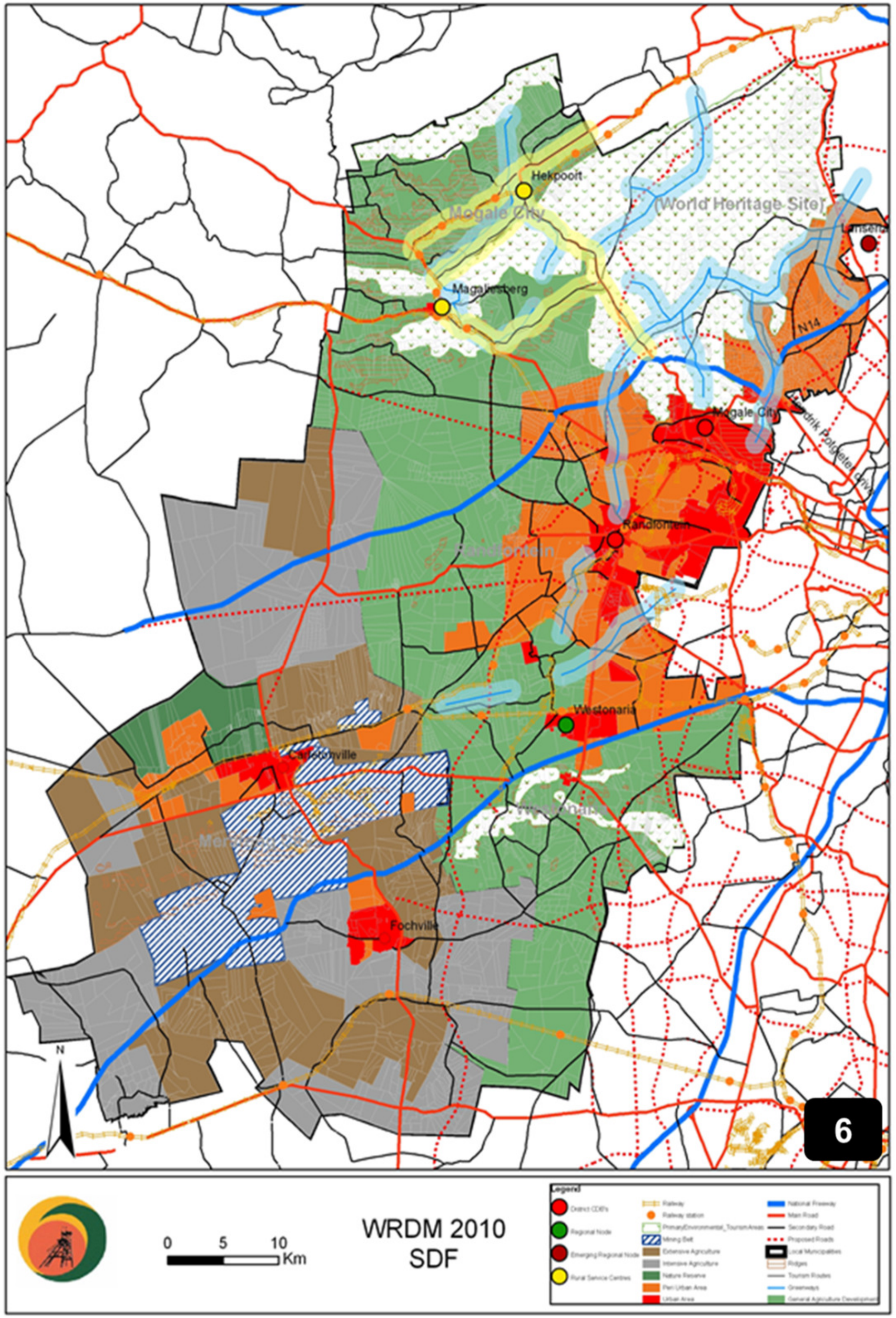
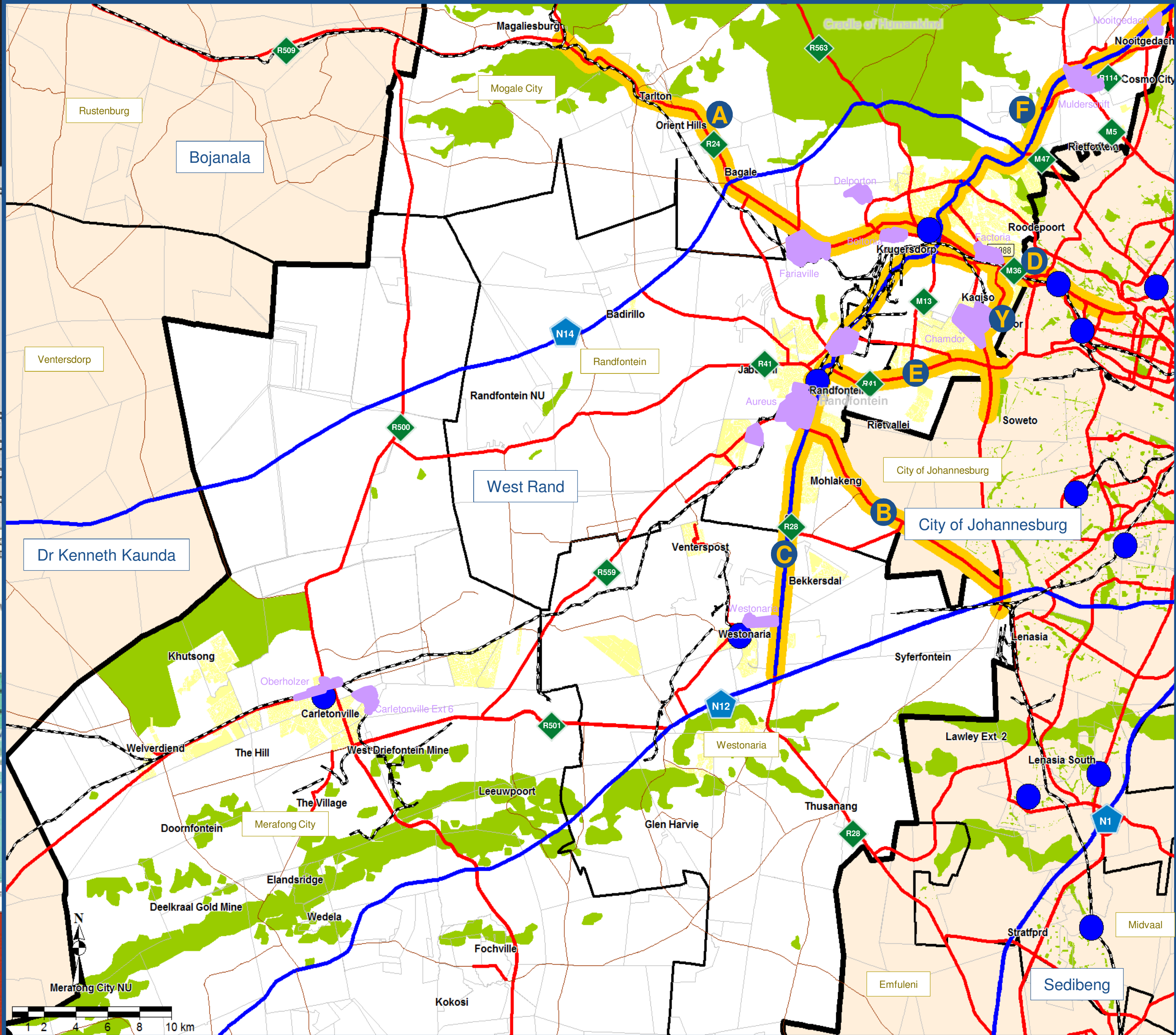




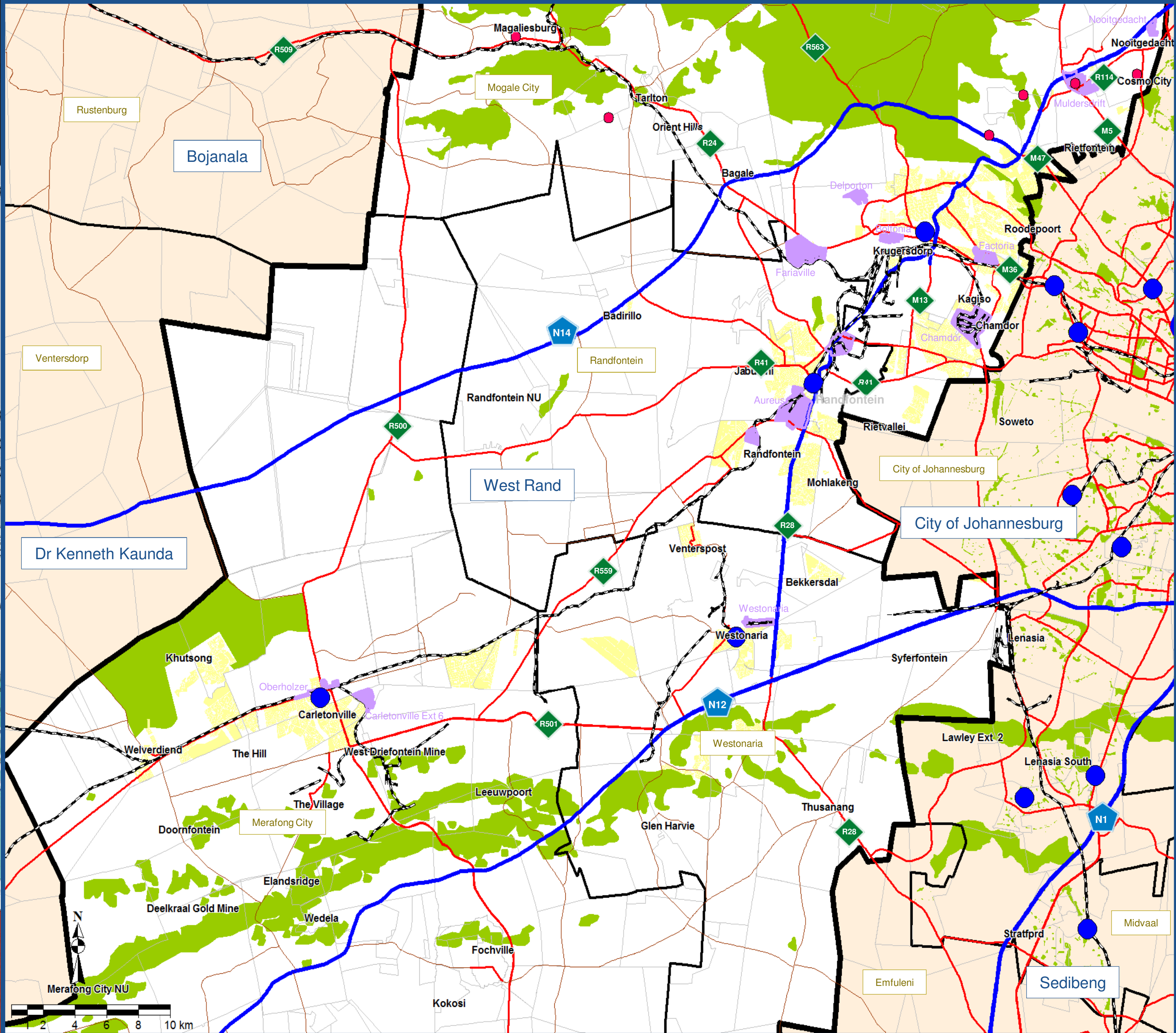
WEST RAND DISTRICT MUNICIPALITY

INDUSTRIAL STRATEGY

PUBLIC TRANSPORT CORRIDORS

Legend

- Metro / District Municipalities
- Municipal Boundaries
- Protected Areas Ridges
- Urban
- Industrial Areas
- Main Business Nodes
- Railway
- National Roads
- Main Roads



WEST RAND DISTRICT MUNICIPALITY

INDUSTRIAL STRATEGY

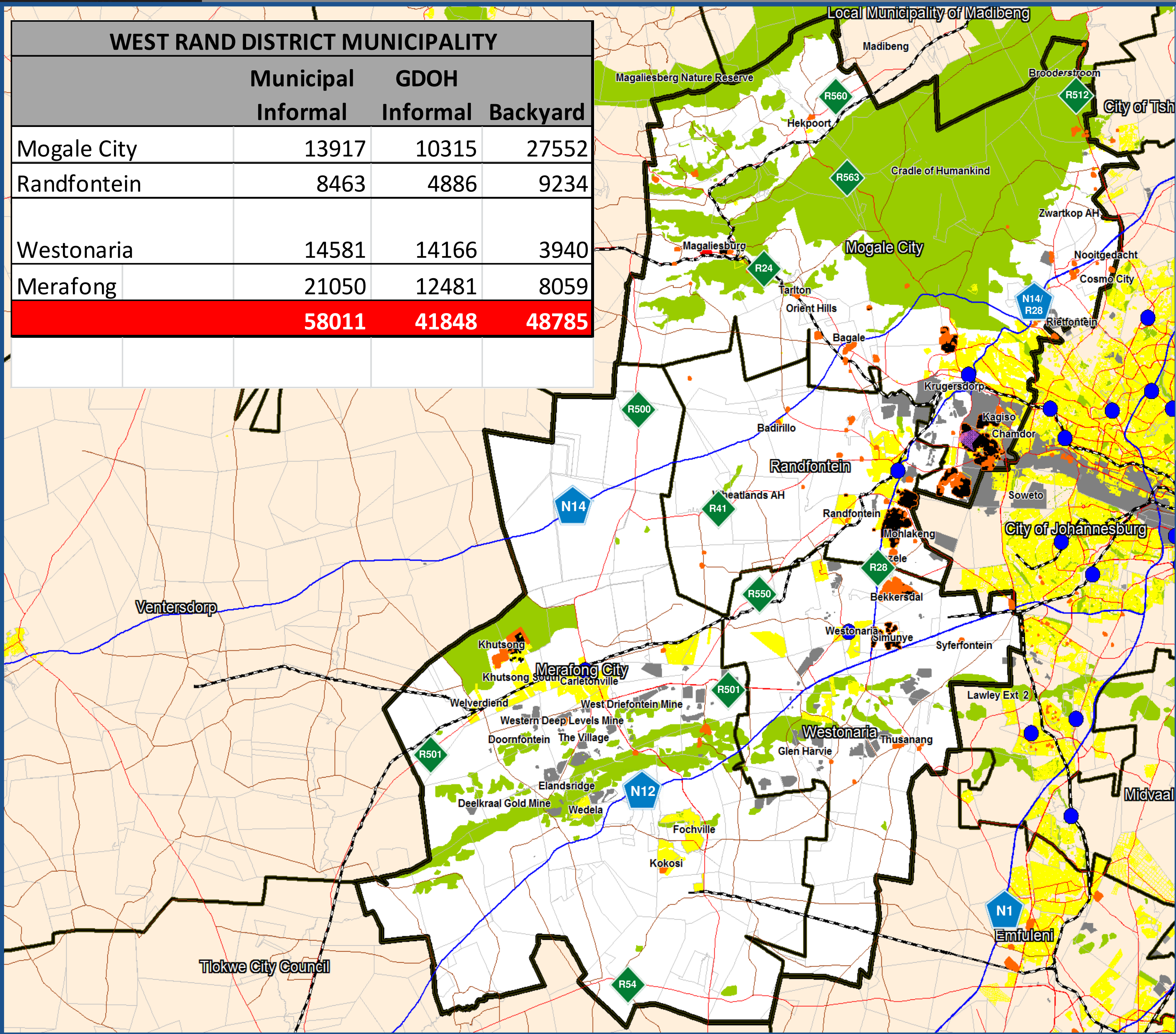
SPATIAL STRUCTURE & MOVEMENT NETWORK

Legend

- Metro / District Municipalities
- Municipal Boundaries
- Protected Areas Ridges
- Urban
- Industrial Areas
- Main Business Nodes
- Railway
- National Roads
- Main Roads

1

WEST RAND DISTRICT MUNICIPALITY			
	Municipal Informal	GDOH Informal	Backyard
Mogale City	13917	10315	27552
Randfontein	8463	4886	9234
Westonaria	14581	14166	3940
Merafong	21050	12481	8059
	58011	**41848**	**48785**



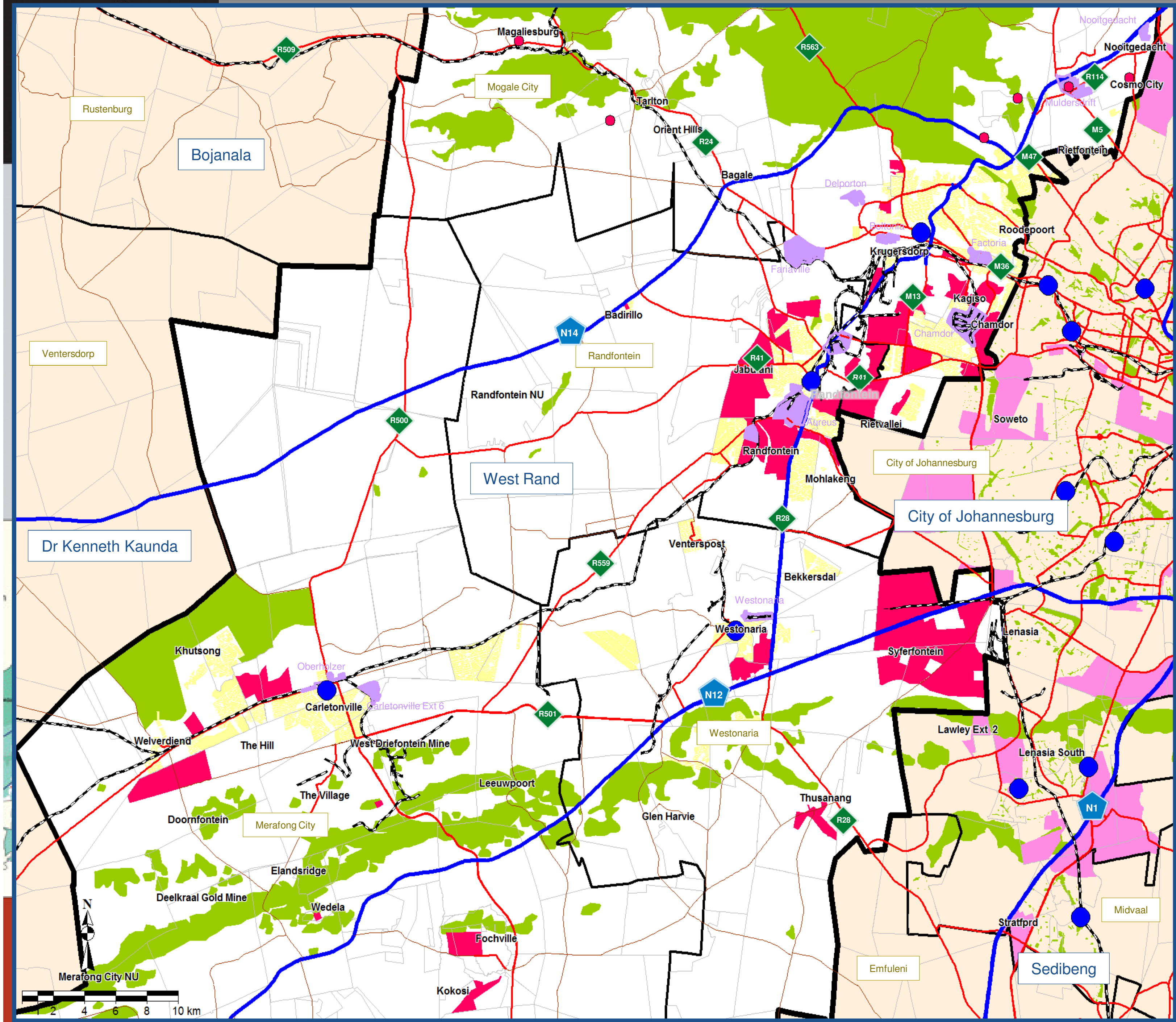
WEST RAND DISTRICT MUNICIPALITY

HUMAN SETTLEMENT PLAN

INFORMAL SETTLEMENTS AND BACKYARD UNITS

Legend

- Metro / District Municipalities
- Municipal Boundaries
- West Rand DM
- Protected Areas / Natural System
- Ridges
- Mining Areas
- Industrial Areas
- Formal Settlements
- Informal Settlements
- Backyard Units
- Main Business Nodes
- Railway
- National Roads
- Main Roads
- Secondary Roads



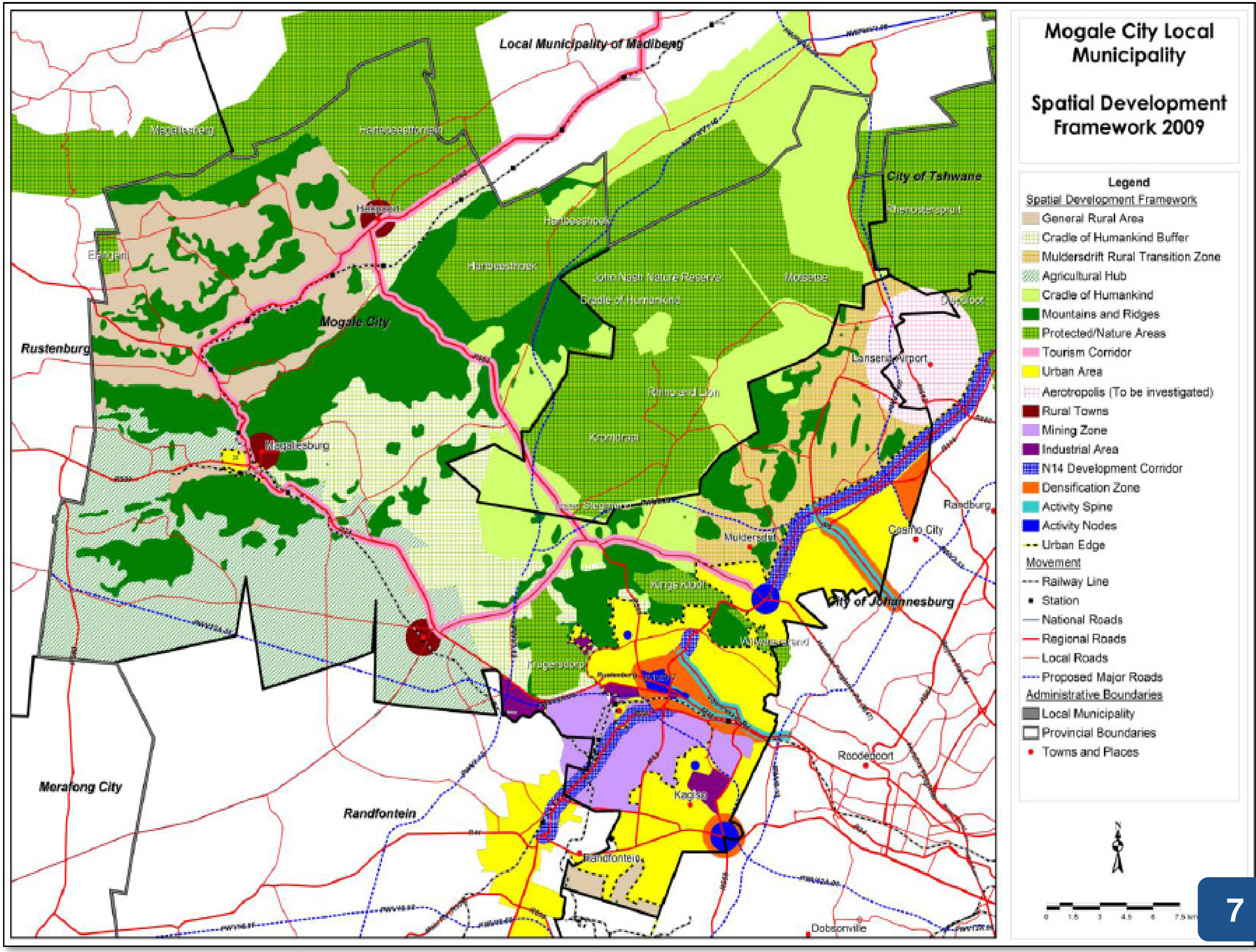
WEST RAND DISTRICT MUNICIPALITY

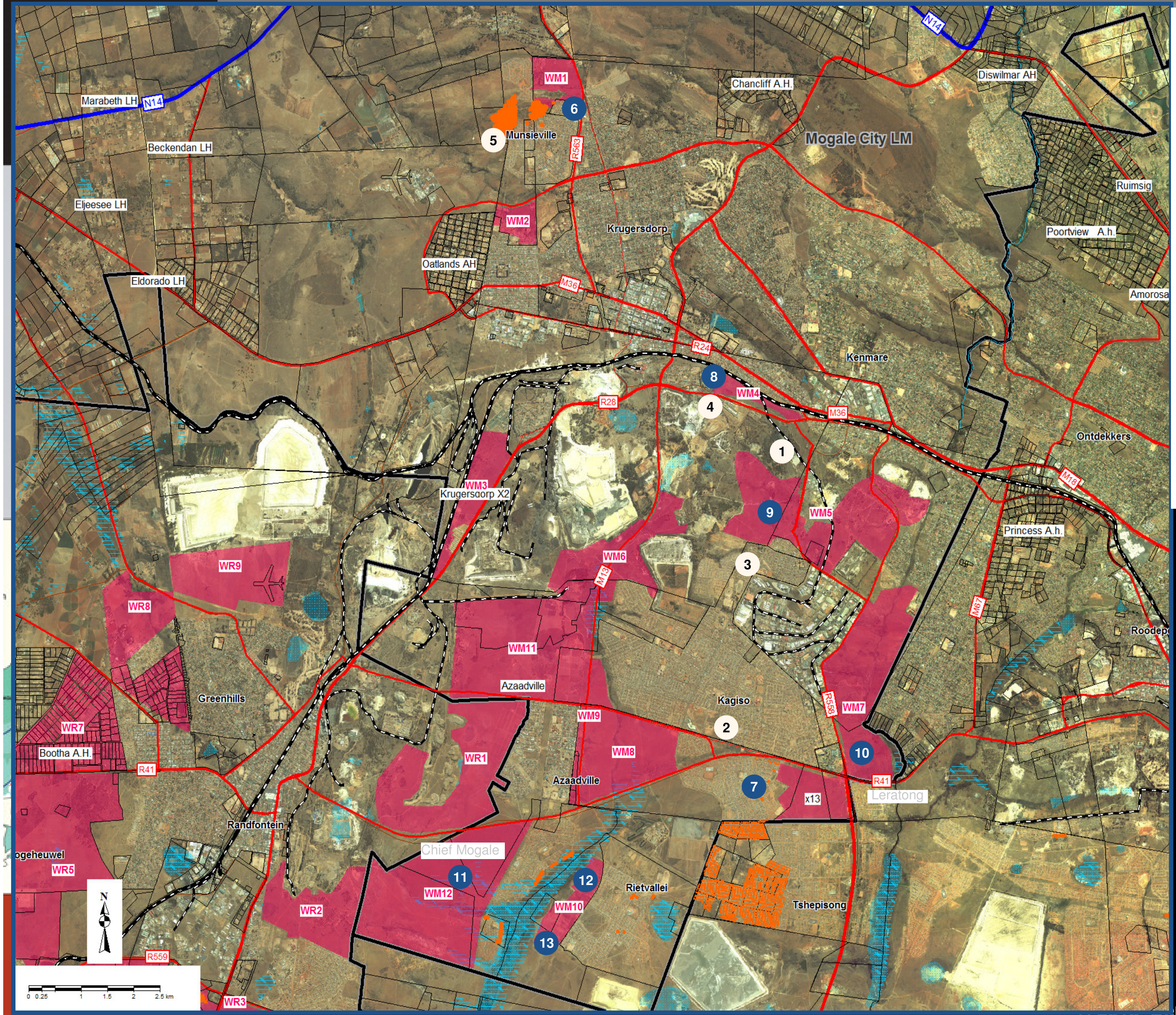
INDUSTRIAL STRATEGY

STRATEGIC DEVELOPMENT AREAS

Legend

- Metro / District Municipalities
- Municipal Boundaries
- Protected Areas Ridges
- Urban
- Industrial Areas
- Strategic Development Areas
- JHB Development Areas
- Main Business Nodes
- Main Business Nodes
- Railway
- National Roads
- Main Roads


Mogale City Local Municipality
Spatial Development Framework 2009
Legend
Spatial Development Framework
General Rural Area
Cradle of Humankind Buffer
Muldersdrift Rural Transition Zone
Agricultural Hub
Cradle of Humankind
Mountains and Ridges
Protected/Nature Areas
Tourism Corridor
Urban Area
Aerotropolis (To be investigated)
Rural Towns
Mining Zone
Industrial Area
N14 Development Corridor
Densification Zone
Activity Spine
Activity Nodes
Urban Edge
Movement
Railway Line
Station
National Roads
Regional Roads
Local Roads
Proposed Major Roads
Administrative Boundaries
Local Municipality
Provincial Boundaries
Towns and Places
Local Municipality of Madibeng
City of Tshwane
Mogale City
Rustenburg
City of Johannesburg
Merafong City
Randfontein
Magaliesburg
Muldersdrift
Kagiso
Randburg
Cosmo City
Roodepoort
Dobsonville
Lanseria Airport
Kromdraai
Krugersdorp
John Nash Nature Reserve
Cradle of Humankind



WEST RAND DISTRICT MUNICIPALIT Y

HUMAN SETTLEMENT PLAN

MOGALE CITY

STRATEGIC DEVELOPMENT AREAS IDENTIFIED

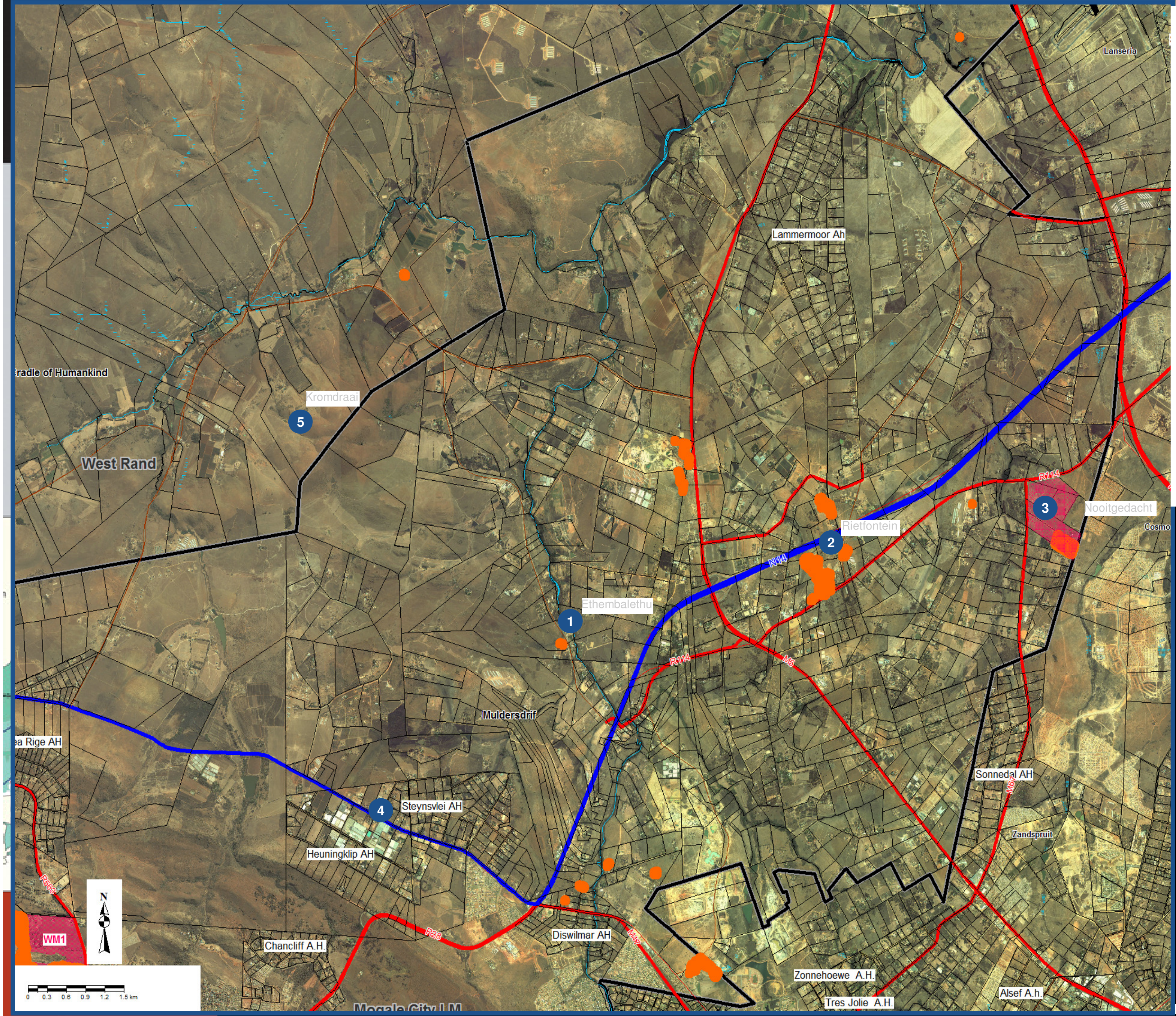
- Main Roads
- Secondary Roads
- Railway
- Housing Projects
- Hostel Projects
- Informal

WEST RAND DISTRICT MUNICIPALIT Y

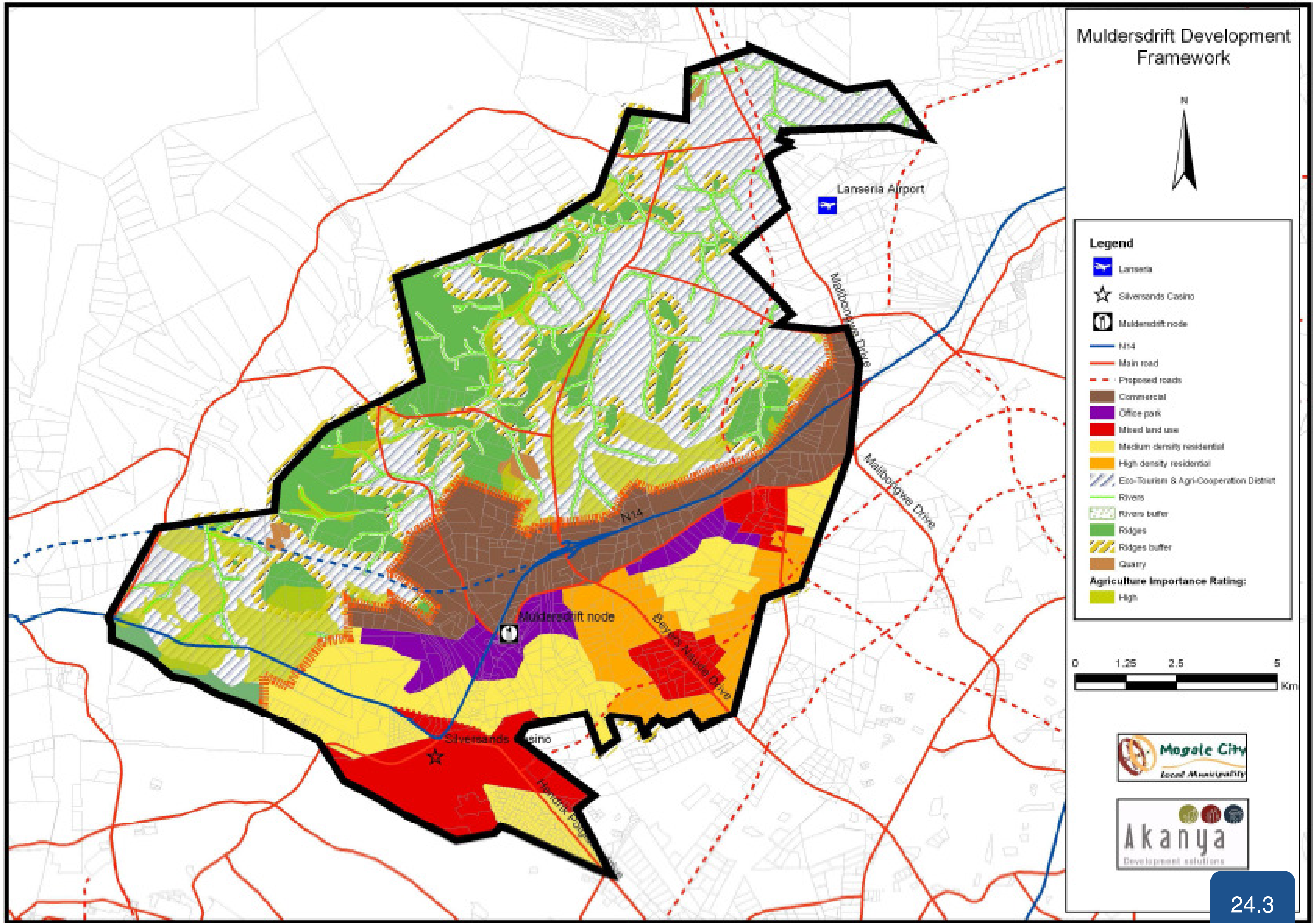
HUMAN SETTLEMENT PLAN

MOGALE CITY

STRATEGIC DEVELOPMENT AREAS IDENTIFIED

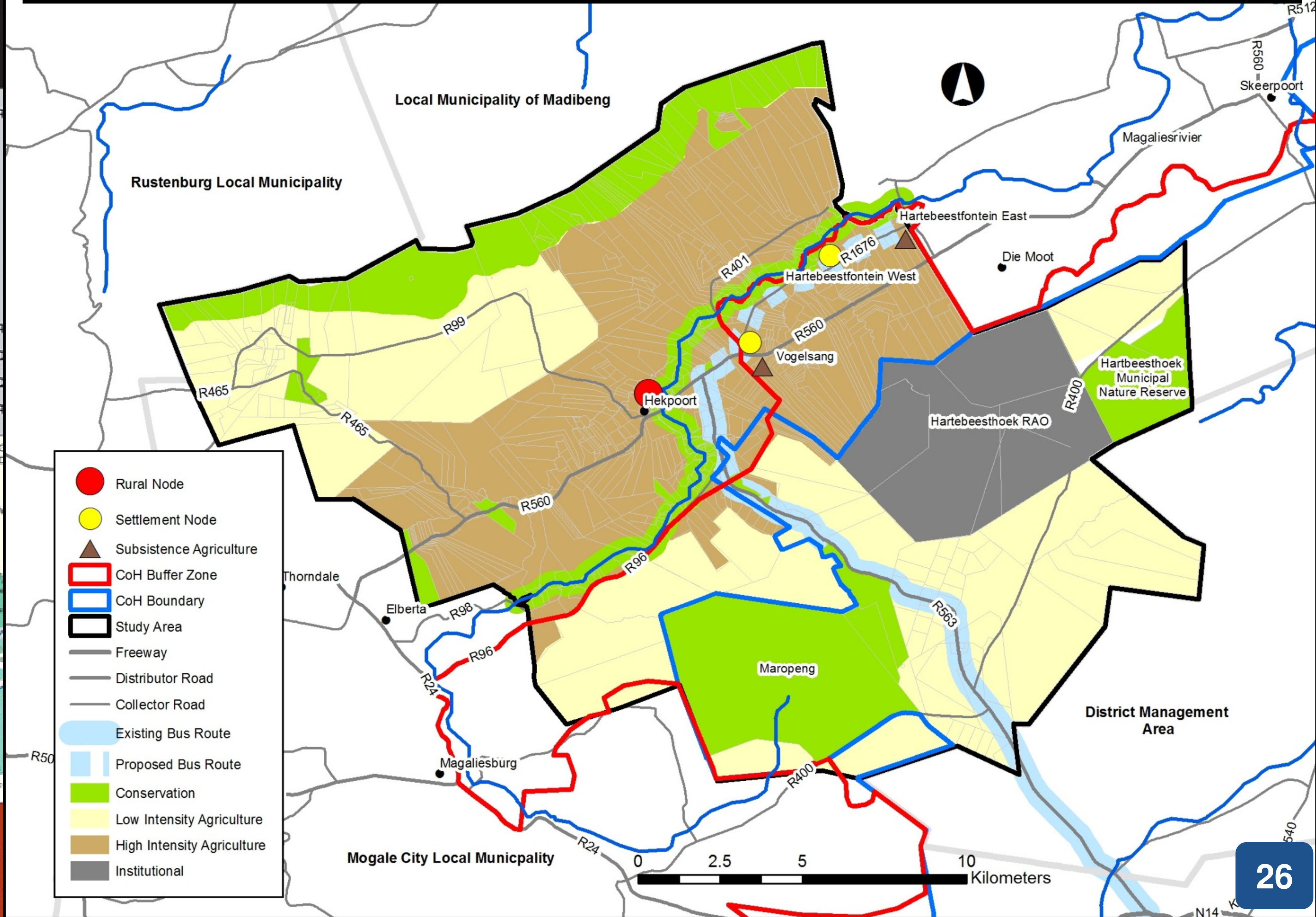


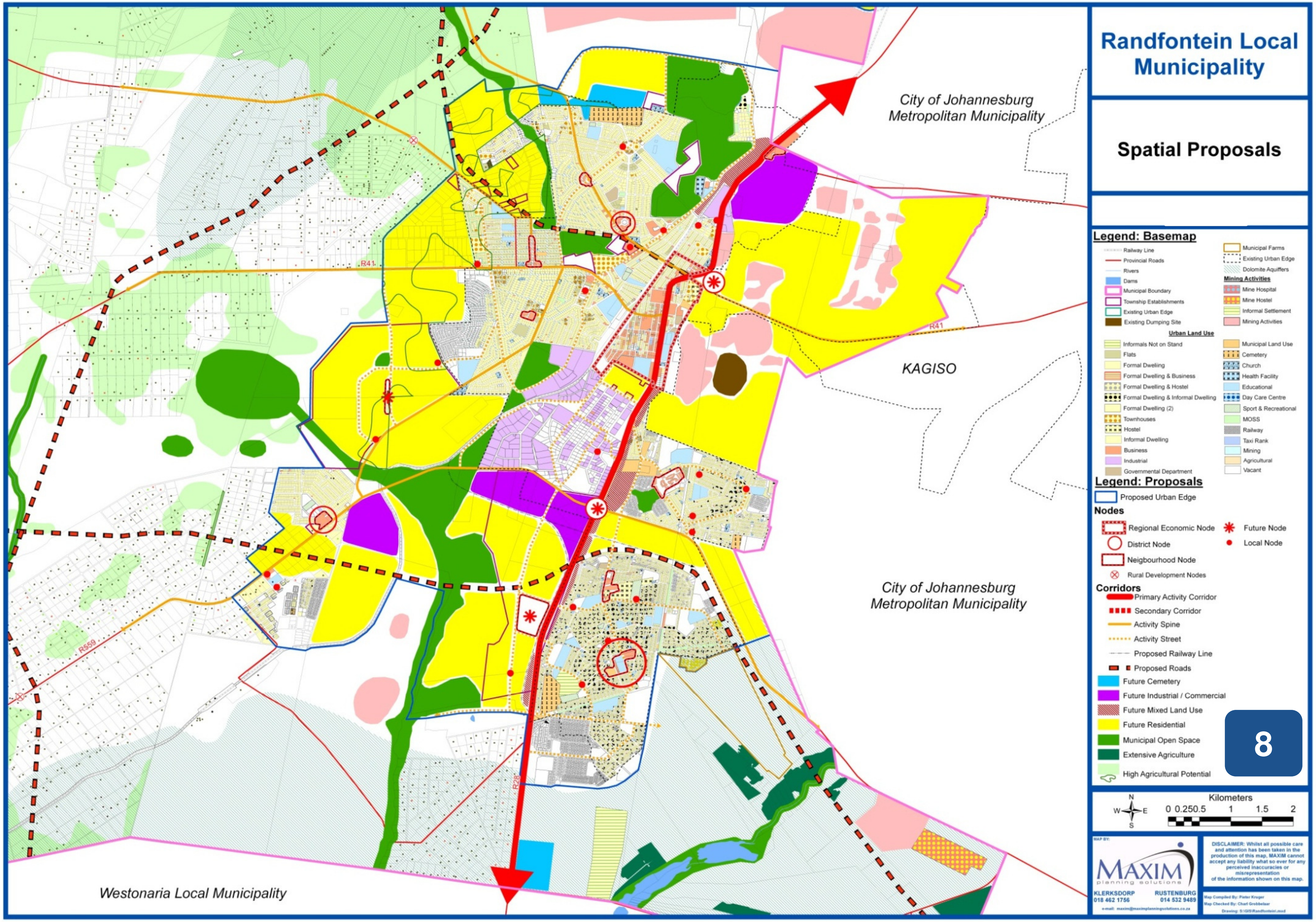
- Main Roads
- Secondary Roads
- Railway
- Informal
- Housing Projects


Muldersdrift Development Framework
N
Legend
Lanseria
Silversands Casino
Muldersdrift node
N14
Main road
Proposed roads
Commercial
Office park
Mixed land use
Medium density residential
High density residential
Eco-Tourism & Agri-Cooperation District
Rivers
Rivers buffer
Ridges
Ridges buffer
Quarry
Agriculture Importance Rating:
High
0 1.25 2.5 5
Km
Lanseria Airport
Malibongwe Drive
N14
Muldersdrift node
Beyers Naude Drive
Silversands Casino
Mogale City Local Municipality
Akanya Development solutions

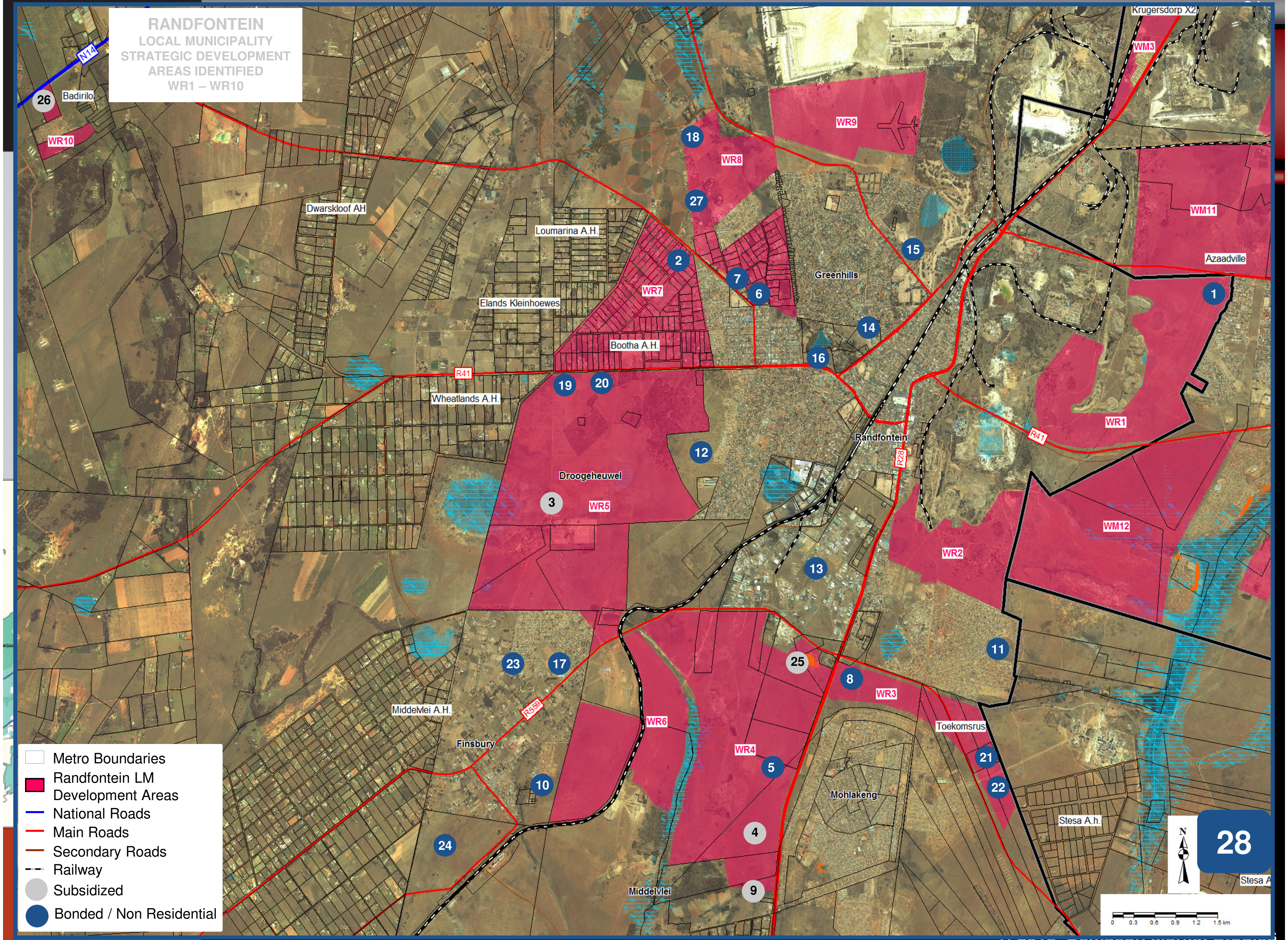
24.3

DEVELOPMENT FRAMEWORK





Randfontein Local Municipality
Spatial Proposals
City of Johannesburg Metropolitan Municipality
KAGISO
City of Johannesburg Metropolitan Municipality
Westonaria Local Municipality
R41
R41
R559
R28
Legend: Basemap
Railway Line
Provincial Roads
Rivers
Dams
Municipal Boundary
Township Establishments
Existing Urban Edge
Existing Dumping Site
Municipal Farms
Existing Urban Edge
Dolomite Aquiffers
Mining Activities
Mine Hospital
Mine Hostel
Informal Settlement
Mining Activities
Urban Land Use
Informals Not on Stand
Flats
Formal Dwelling
Formal Dwelling & Business
Formal Dwelling & Hostel
Formal Dwelling & Informal Dwelling
Formal Dwelling (2)
Townhouses
Hostel
Informal Dwelling
Business
Industrial
Governmental Department
Municipal Land Use
Cemetery
Church
Health Facility
Educational
Day Care Centre
Sport & Recreational
MOSS
Railway
Taxi Rank
Mining
Agricultural
Vacant
Legend: Proposals
Proposed Urban Edge
Nodes
Regional Economic Node
Future Node
District Node
Local Node
Neigbourhood Node
Rural Development Nodes
Corridors
Primary Activity Corridor
Secondary Corridor
Activity Spine
Activity Street
Proposed Railway Line
Proposed Roads
Future Cemetery
Future Industrial / Commercial
Future Mixed Land Use
Future Residential
Municipal Open Space
Extensive Agriculture
High Agricultural Potential
8
N
W
E
S
Kilometers
0 0.250.5 1 1.5 2
MAP BY:
MAXIM planning solutions
KLERKSDORP 018 462 1756
RUSTENBURG 014 532 9489
DISCLAIMER: Whilst all possible care and attention has been taken in the production of this map, MAXIM cannot accept any liability what so ever for any perceived inaccuracies or misrepresentation of the information shown on this map.


RANDFONTEIN
LOCAL MUNICIPALITY
STRATEGIC DEVELOPMENT
AREAS IDENTIFIED
WR1 – WR10
N14
Badirilo
WR10
Krugersdorp X2
WM3
WR9
WR8
Dwarskloof AH
Loumarina A.H.
WM11
Azaadville
WR7
Greenhills
Elands Kleinhoewes
Bootha A.H.
R41
Wheatlands A.H.
Randfontein
WR1
R28
Droogeheuwel
WR5
WM12
WR2
WR3
WR6
WR4
MiddelMei A.H.
Finsbury
R559
Toekomsrus
Mohlakeng
Stesa A.h.
Middelvlei
Metro Boundaries
Randfontein LM Development Areas
National Roads
Main Roads
Secondary Roads
Railway
Subsidized
Bonded / Non Residential
28

Creation of a high quality, functional public open spa

Creating Gateway Elements

Define Urban Boundary/Edge

Strengthen economic development

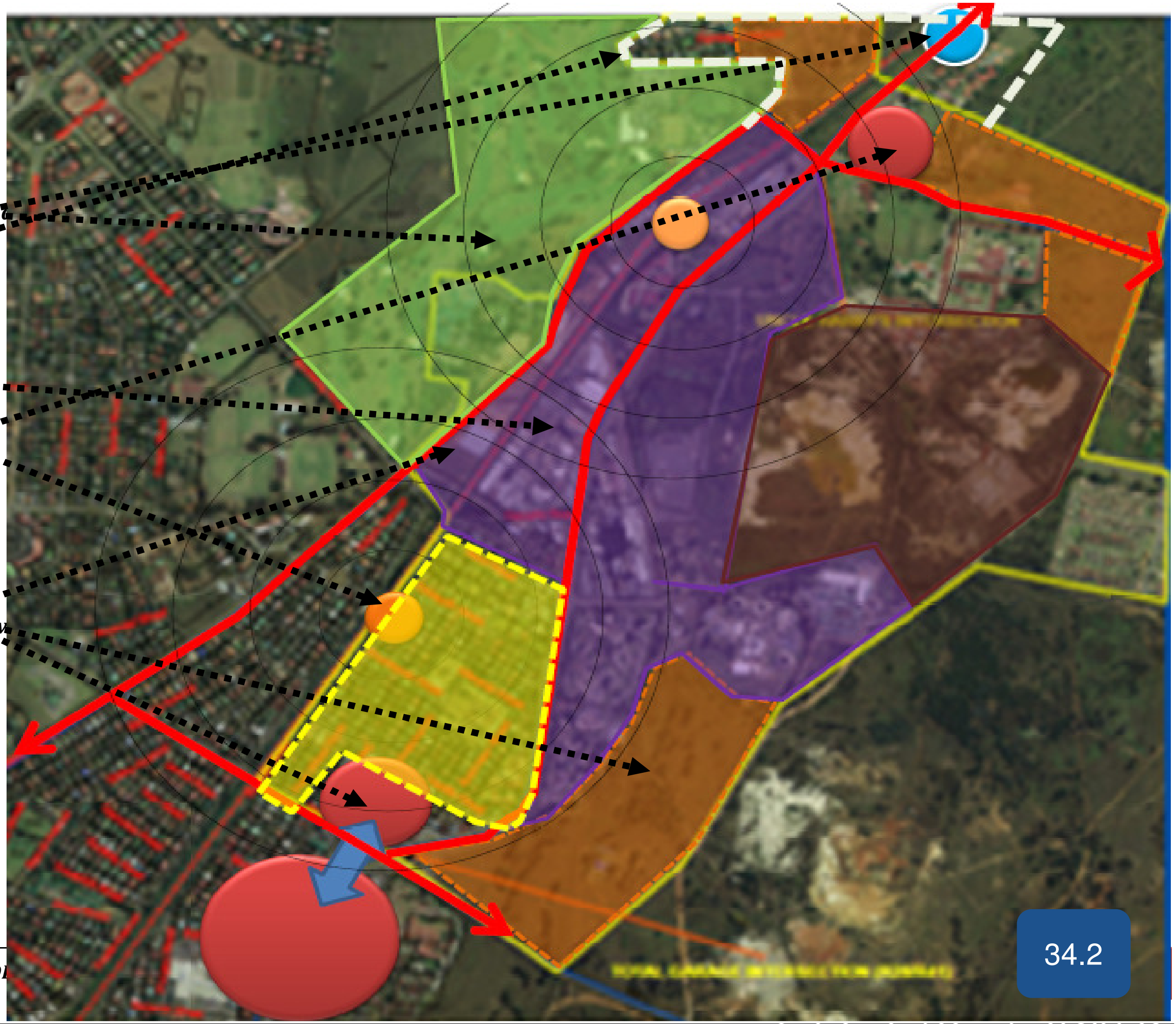
TOD Focus Area and the development of the station

Creation of Neighbourhood Business Node

Strengthening of Community Node

Appropriate Residential Development

Utilise the energy provided by public transport netw



rural development & land reform
Department:
Rural Development and Land Reform
REPUBLIC OF SOUTH AFRICA

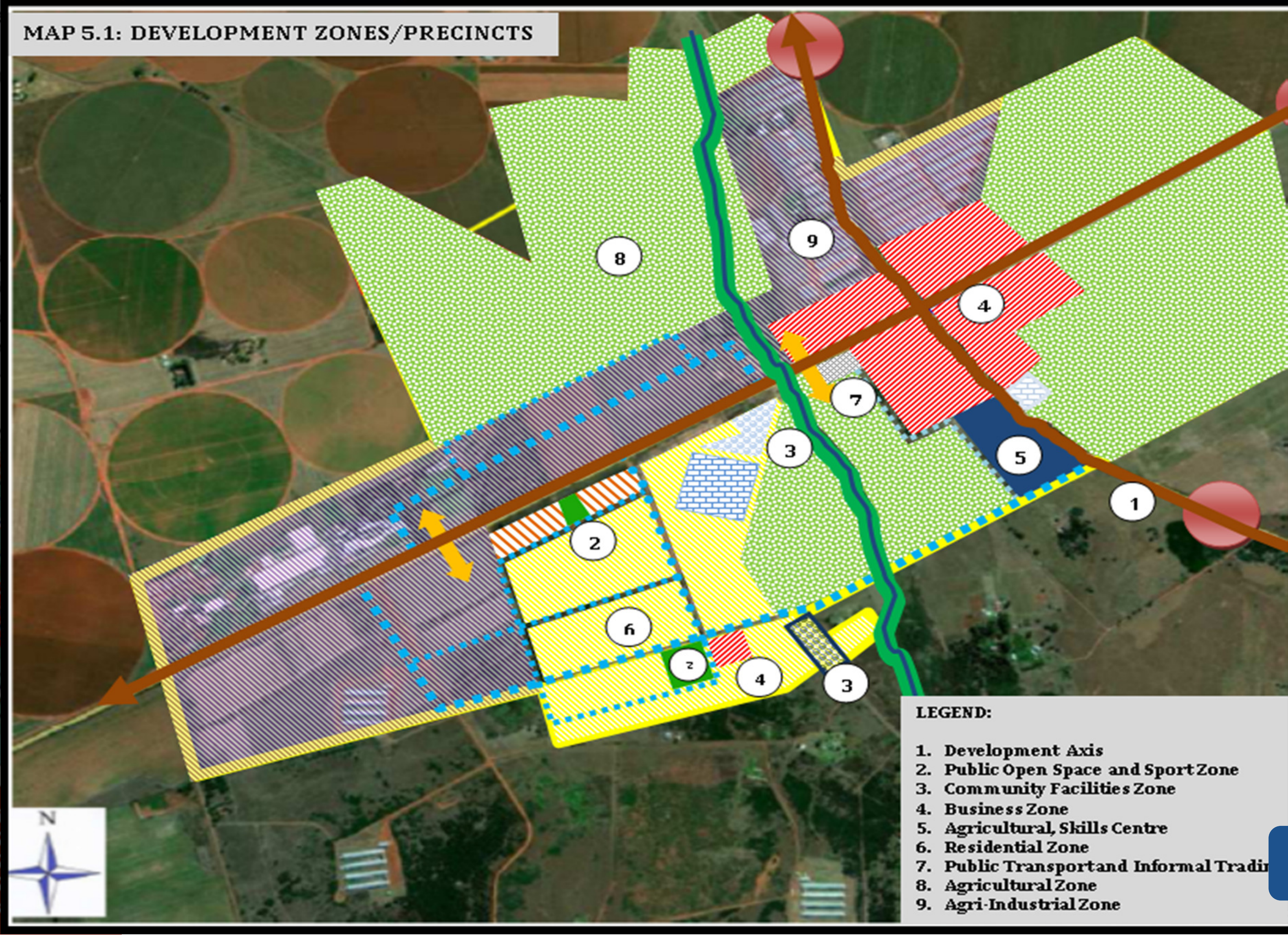
Part 1: Nodal Precincts

The node is made up of a number of spatial precincts or sub-areas. Each of these components will be dealt with individually for the purpose of identifying appropriate land uses and design and development guidelines

Real Estate Market
- Retail
- Residential typo
- Office
- Industrial
- Warehousing &
- Tourism / Shor
- MICE activities

Real Estate and Fisc
Demographics Profil
Customer In-store S
Refurbishment & Re

Gauteng Demand
Density Analysis



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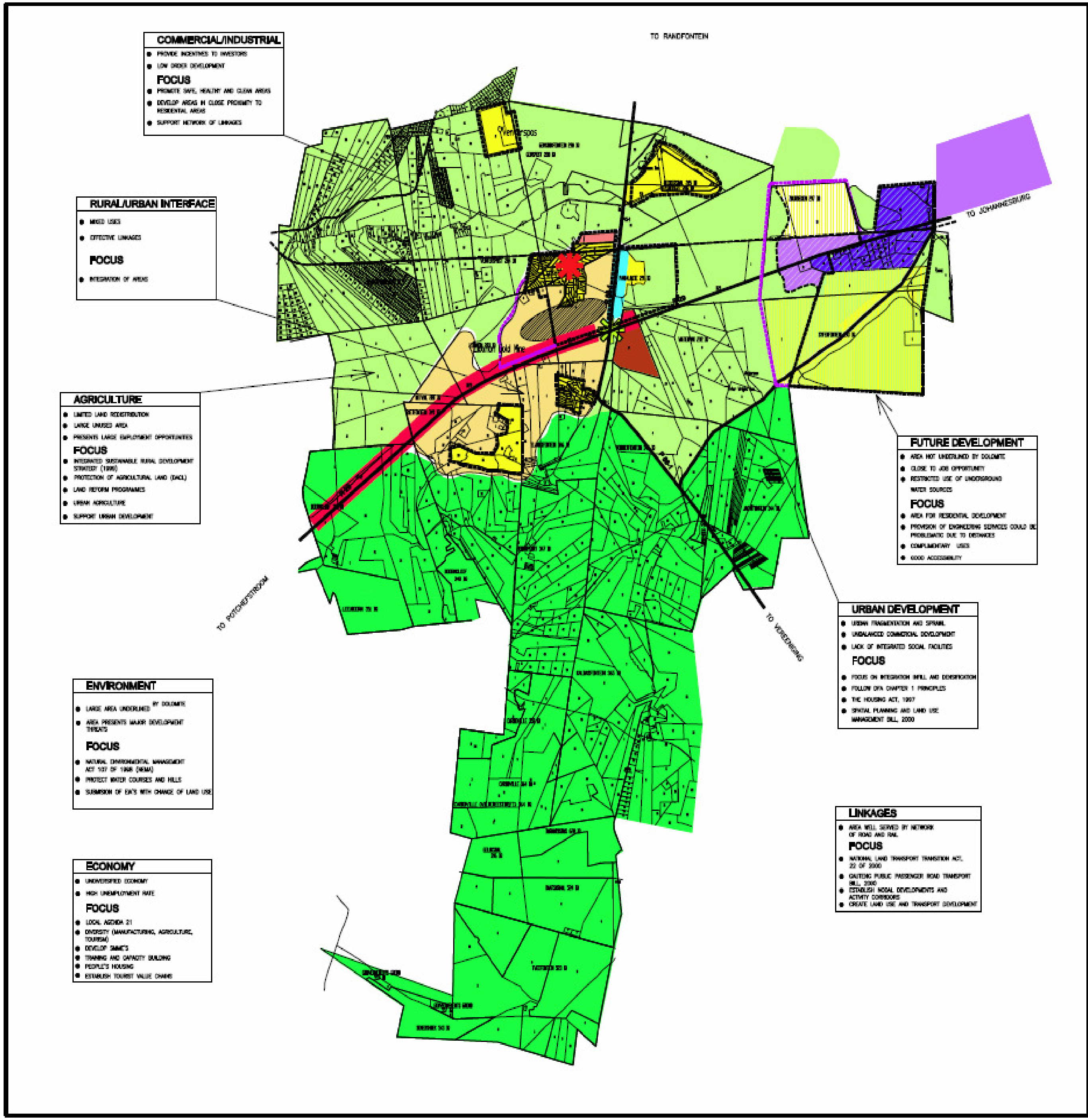
28.1

et Studies


N14
Badirilo
28.2
N
0 50 100 150 200 250 m



WESTONARIA LOCAL MUNICIPALITY

INTEGRATED DEVELOPMENT PLAN

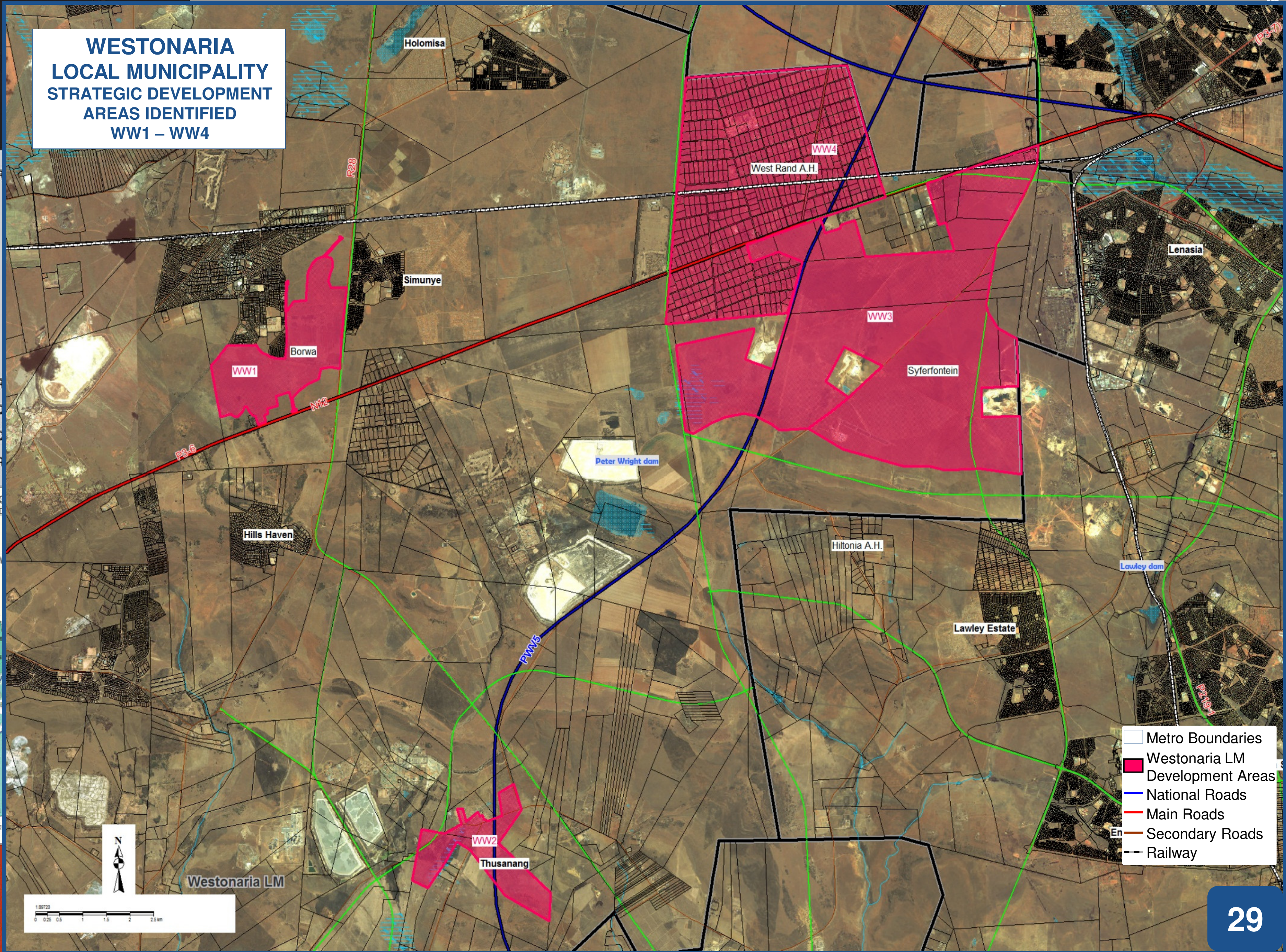
- Existing Activity Node
- Potential Activity Node (Medium Term)
- Activity Corridor (N12 Treasure Route)
- Activity Spine (Medium Term)
- Urban Development Under Planning
- Existing Urban Areas
- Agriculture / Mining
- Conservation / Mining / Agriculture
- Potential Longer Term Urban Development
- Rural Residential
- Future Residential
- Future Residential, Industrial and Commercial
- Future Industrial and Commercial
- Area for Relocation of Bekkersdal Informal Settlement
- Urban Edge (Approved)
- Urban Edge (Proposed)
- Future industrial and commercial in Johannesburg Municipal Area
- Geotechnical line

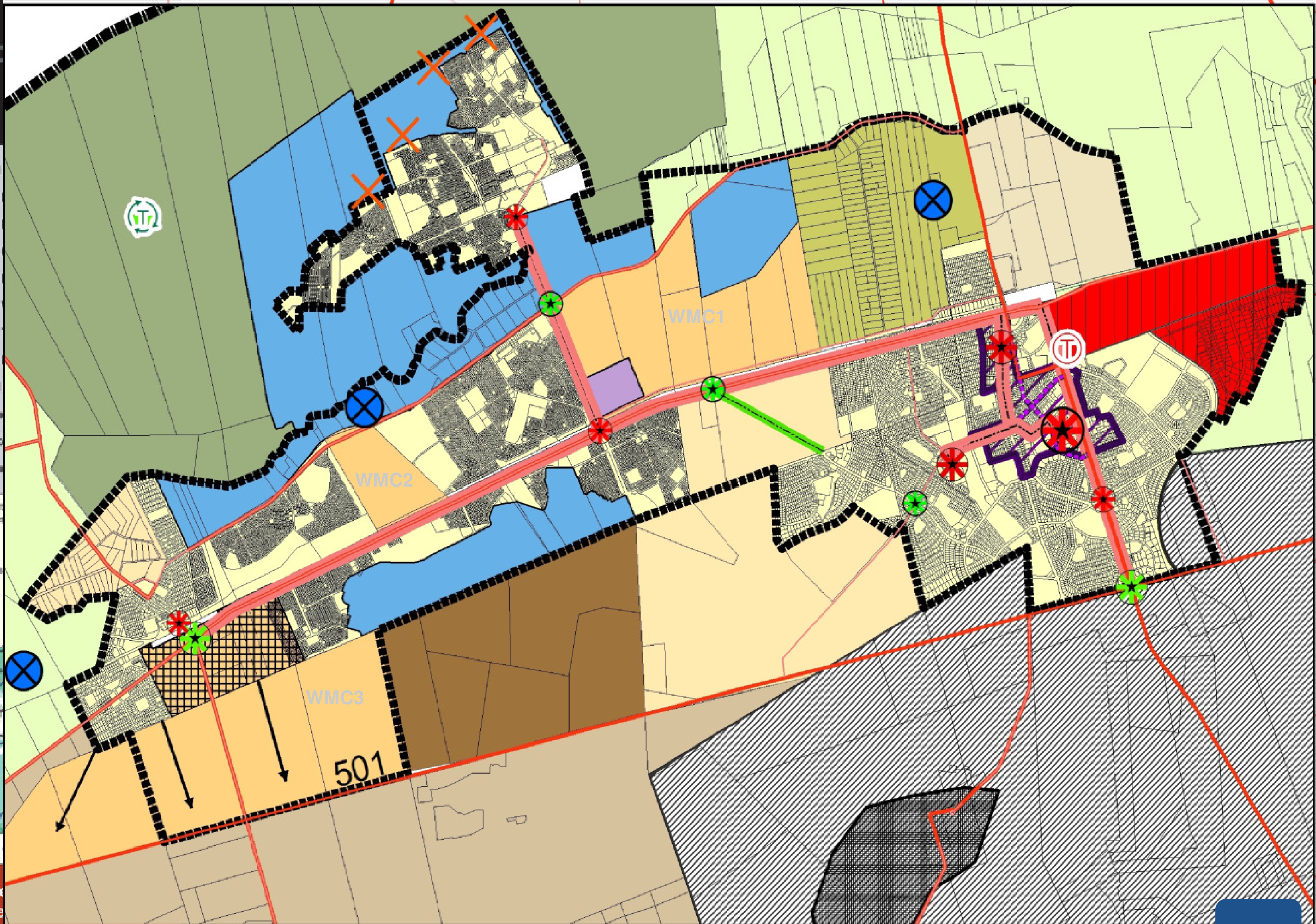
9

SPATIAL DEVELOPMENT FRAMEWORK

DATE : FEBRUARY 2013

CPPC CASSIE PELSER PROPERTY CONSULTANT
P.O.BOX 7303, KRUGERSDORP NORTH, 1741
TEL: (011)660-4342 FAX: (011) 660-4342
CELL: 072-271-9904


WESTONARIA
LOCAL MUNICIPALITY
STRATEGIC DEVELOPMENT
AREAS IDENTIFIED
WW1 – WW4
Holomisa
Simunye
Borwa
WW1
N12
P3-6
P28
Hills Haven
Peter Wright dam
West Rand A.H.
WW4
WW3
Syferfontein
Lenasia
Hiltonia A.H.
Lawley dam
Lawley Estate
PWV5
WW2
Thusanang
Westonaria LM
N
Metro Boundaries
Westonaria LM Development Areas
National Roads
Main Roads
Secondary Roads
Railway



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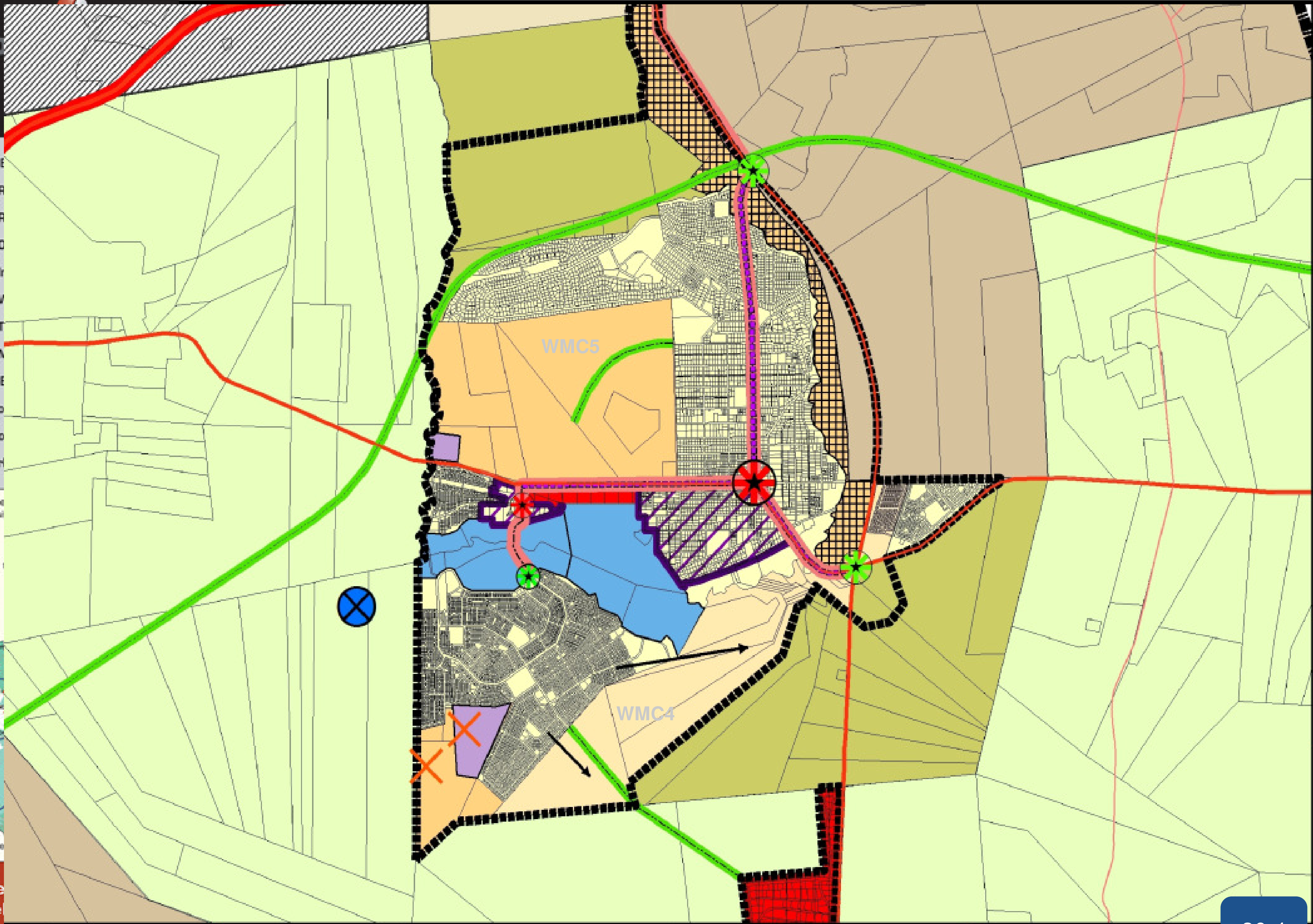

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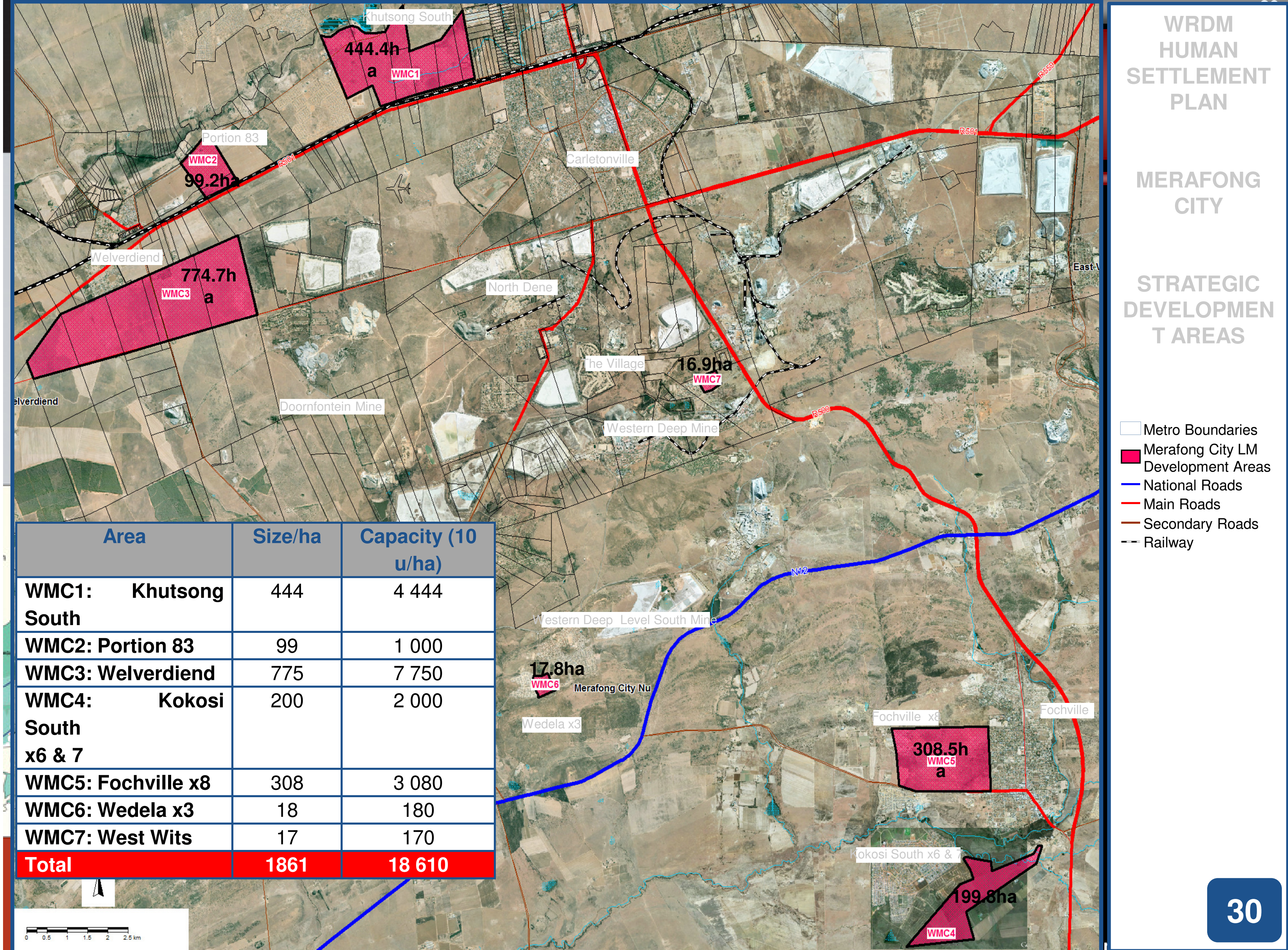
WRDM HUMAN SETTLEMENT PLAN

MERAFONG CITY

STRATEGIC DEVELOPMENT AREAS



Area	Size/ha	Capacity (10 u/ha)
WMC1: Khutsong South	444	4 444
WMC2: Portion 83	99	1 000
WMC3: Welverdiend	775	7 750
WMC4: Kokosi South x6 & 7	200	2 000
WMC5: Fochville x8	308	3 080
WMC6: Wedela x3	18	180
WMC7: West Wits	17	170
Total	**1861**	**18 610**

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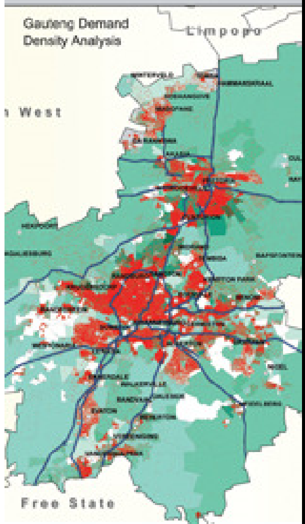

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POLICY GUIDELINES

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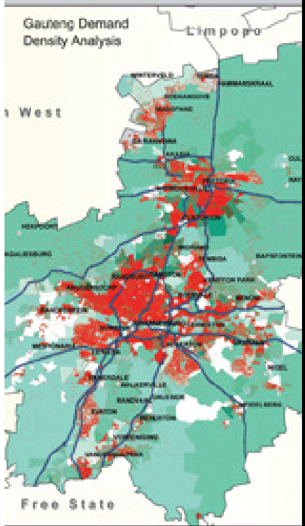

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MACRO POLICY GUIDELINES

Macro Policies – National Policy Framework

National Spatial Development Perspective

- ✓ Innovation and experimentation
- ✓ Production of high value, differentiated goods (not strongly dependent on labour)
- ✓ Production of labour-intensive, mass-produce goods (more dependent on labour costs and / or on natural-resource exploitation)
- ✓ Public services and administration
- ✓ Retail and private-sector services
- ✓ Tourism.

National Development Plan: Vision 2030

- ✓ Economy and Employment
- ✓ Economic infrastructure
- ✓ Environmental sustainability and resilience
- ✓ Inclusive rural economy
- ✓ South Africa in the region and the world
- ✓ Transforming Human Settlements
- ✓ Improving education, training and innovation
- ✓ Health care for all
- ✓ Social protection
- ✓ Building Safer Communities
- ✓ Building a capable and developmental state
- ✓ Fighting corruption
- ✓ Nation building and social cohesion

Industrial Policy Action Plans

Cluster 1 – Qualitatively new areas of focus:
- ✓ Metal fabrication, capital and transport equipment sectors
- ✓ Upstream Oil and Gas
- ✓ "Green" and energy-saving industries
- ✓ Agro-processing
- ✓ Boatbuilding

Cluster 2 – Scaled-up and broadened interventions in existing IPAP sectors:
- ✓ Automotive products and components,
- ✓ Plastics, pharmaceuticals and chemicals
- ✓ Clothing, textiles, footwear and leather
- ✓ Biofuels
- ✓ Forestry, paper, pulp and furniture
- ✓ Creative and cultural industries
- ✓ Business process services

Cluster 3 – Sectors with potential for long-term advanced capabilities:
- ✓ Nuclear
- ✓ Advanced materials
- ✓ Aerospace, Defence, and
- ✓ Electrotechnical and ICT

National Growth Path

- ✓ Infrastructure development
- ✓ Agriculture
- ✓ Mining
- ✓ Manufacturing
- ✓ Green economies

DEMACON
market studies

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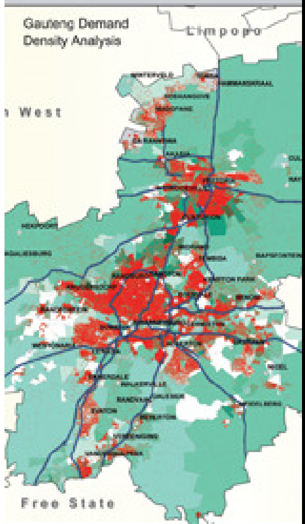

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MACRO POLICY GUIDELINES

NATIONAL INFRASTRUCTURE PLAN

- SIP 1: Unlocking The Northern Mineral Belt With Primary Mineral Reserves Waterberg As The Catalyst
- SIP 2: Durban-Free State-Gauteng Logistics And Industrial Corridor
- SIP 3: South-Eastern Node & Corridor Development
- SIP 4: Unlocking The Economic Opportunities In North West Province
- SIP 5: Saldanha-Northern Cape Development Corridor
- SIP 6: Integrated Municipal Infrastructure Project
- SIP 7: Integrated Urban Space And Public Transport Programme
- SIP 8: Green Energy In Support Of The South African Economy
- SIP 9: Electricity Generation To Support Socioeconomic Development
- SIP 10: Electricity Transmission And Distribution For All
- SIP 11: Agri-Logistics And Rural Infrastructure
- SIP 12: Revitalisation Of Public Hospitals And Other Health Facilities
- SIP 13: National School Build Programme
- SIP 14: Higher Education Infrastructure
- SIP 15: Expanding Access To Communication Technology
- SIP 16: Ska & Meerkat
- SIP 17: Regional Integration For African Cooperation And Development
- SIP 18: Water And Sanitation Infrastructure

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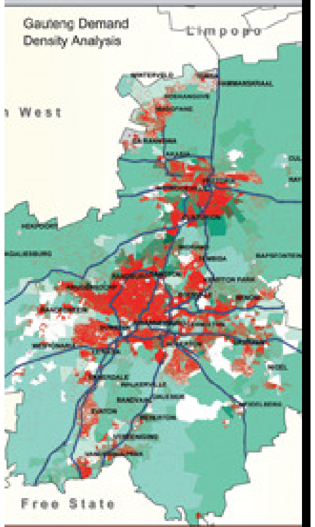

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SIPS - Summary

Geographic SIPS

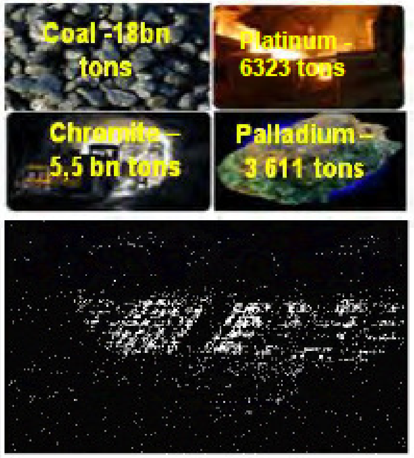
SIP 1: Unlocking the Northern Mineral Belt with Waterberg as the Catalyst

Investment in rail, water pipelines, energy generation and transmission infrastructure will catalyse unlocking of rich mineral resources in Limpopo resulting in thousands of direct jobs across the areas covered. Urban development in the Waterberg will be the first major post apartheid new urban centre and will be a "green" development project.

Mining includes coal, platinum and other minerals for local use and export, hence the rail capacity is being extended to Mpumalanga power stations and for export principally via Richards Bay and in future Maputo (via Swaziland link).

The additional rail capacity will shift coal from road to rail in Mpumalanga with positive environmental and social benefits. Supportive logistics corridors will help to strengthen Mpumalanga's economic development.

Primary Mineral Reserves



SIP 2: Durban- Free State– Gauteng Logistics and Industrial Corridor

Strengthen the logistics and transport corridor between SA's main industrial hubs; improve access to Durban's export and import facilities, raise efficiency along the corridor and integrate the Free State Industrial Strategy activities into the corridor and integrate the currently disconnected industrial and logistics activities as well as marginalised rural production centres surrounding the corridor that are currently isolated from the main logistics system.

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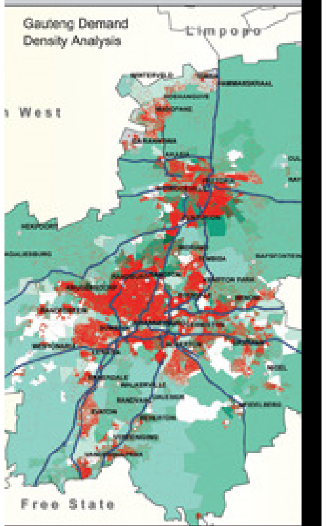

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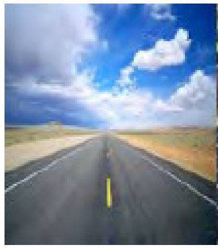
SIPS - Summary

Geographic SIPS

SIP 3: South Eastern node & corridor development

Promote rural development through a new dam at Umzimvubu with irrigation systems and the N2- Wildcoast Highway which improves access into KZN and national supply chains; strengthen economic development in PE through a manganese rail capacity from N Cape, a manganese sinter (NC) and smelter (EC); possible Mthombo refinery (Coega) and transshipment hub at Ngqura and port and rail upgrades to improve industrial capacity and performance of the automotive sector.



SIP 4: Unlocking the economic opportunities in North West Province

The acceleration of identified investments in roads, rail, bulk water and water treatment and transmission infrastructure will result in reliable supply, meet basic social needs and facilitate the further development of mining, agricultural activities and tourism opportunities and open up beneficiation opportunities in the North West Province.

SIP 5: Saldanha-Northern Cape Development Corridor

Develop the Saldanha-Northern Cape linked region in an integrated manner through rail and port expansion, back-of-port industrial capacity (which may include an IDZ) and strengthening maritime support capacity to create economic opportunities from the gas and oil activities along the African West Coast. For the Northern Cape, expansion of iron ore mining production

DEMACON market studies

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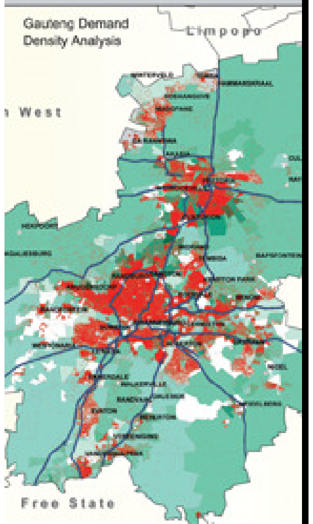

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SIPS - Summary

Spatial SIPS

SIP 6: Integrated Municipal Infrastructure Project

Develop a national capacity to assist the 23 least resourced districts (17 million people) to address all the maintenance backlogs and upgrades required in water, electricity and sanitation bulk infrastructure. The road maintenance programme will enhance the service delivery capacity thereby impact positively on the population.

SIP 7: Integrated Urban Space and Public Transport Programme

Coordinate planning and implementation of public transport, human settlement, economic and social infrastructure and location decisions into sustainable urban settlements connected by densified transport corridors.

SIP 11: Agri-logistics and rural infrastructure

Improve investment in agricultural and rural infrastructure that supports expansion of production and employment, small-scale farming and rural development, including facilities for storage (silos, fresh-produce facilities, packing houses); transport links to main networks (rural roads, branch train-line, ports), fencing of farms, irrigation schemes to poor areas, improved R&D on rural issues (including expansion of agricultural colleges), processing facilities (abattoirs, dairy infrastructure), aquaculture incubation schemes and rural tourism infrastructure.

DEMACON market studies

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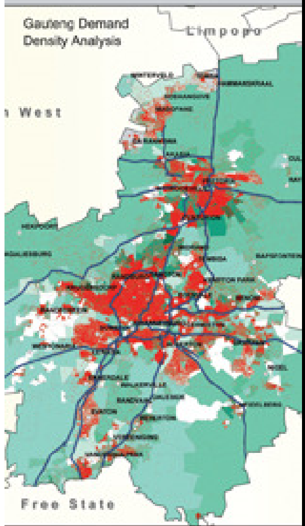

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SIPS - Summary

Energy SIPS

SIP 8: Green Energy in support of the South African economy

Support sustainable green energy initiatives on a national scale through a diverse range of clean energy options as envisaged in the IPR2010 and to support biofuel production facilities.

SIP 9: Electricity Generation to support socio-economic development

Accelerate the construction of new electricity generation capacity in accordance with the IRP2010 to meet the needs of the economy and address historical imbalances.

SIP 10: Electricity Transmission and Distribution for all

Expand the transmission and distribution network to address historical imbalances, provide access to electricity for all and support economic development.

Align the 10-year transmission plan, the services backlog, the national broadband roll-out and the freight rail line development to leverage off regulatory approvals, supply chain and project development capacity.

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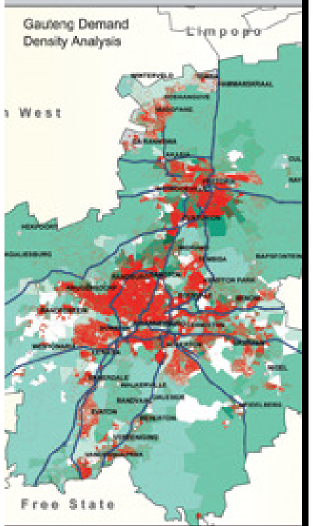

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SIPS - Summary

Social Infrastructure SIPS

SIP 12: Revitalisation of public hospitals and other health facilities

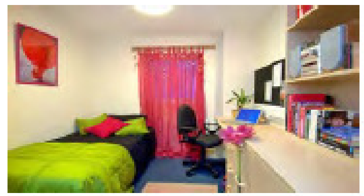
Build and refurbish hospitals, other public health facilities and revamp 122 nursing colleges. Extensive capital expenditure to prepare the public health care system to meet the further requirements of the National Health Insurance (NHI).

SIP 13: National school build programme

A national school build programme driven by uniformity in planning, procurement, contract management & provision of basic services. Replace inappropriate school structures and address basic service backlog & provision of basic services under the Accelerated School Infrastructure Delivery Initiative (ASIDI). In addition address national backlogs in classrooms, libraries, computer labs and admin buildings. Improving the learning environment will go a long way in improving outcomes especially in the rural schools as well as reduce overcrowding.

SIP 14: Higher Education Infrastructure

Infrastructure development for higher education focusing on lecture rooms, student accommodation, libraries and laboratories as well as ICT connectivity. Development of university towns with combination of facilities from residence, retail and recreation & transport. Potential to ensure shared infrastructure such as libraries by universities, FETs & other educational institutions.



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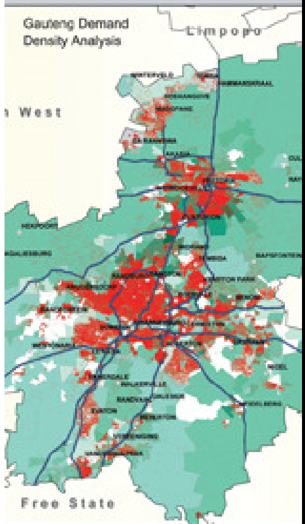

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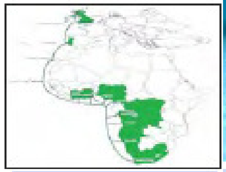
SIPS - Summary

Knowledge SIPS

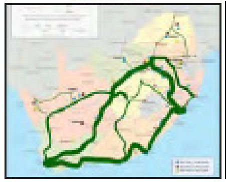
SIP 16: SKA & Meerkat

SKA is a global mega science project, building an advanced radio-telescope facility linked to research infrastructure and high speed ICT capacity & provides an opportunity for Africa and South Africa to contribute towards advance science.

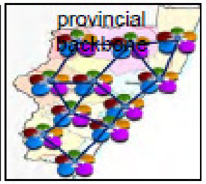
Infraco capacity on WACs.



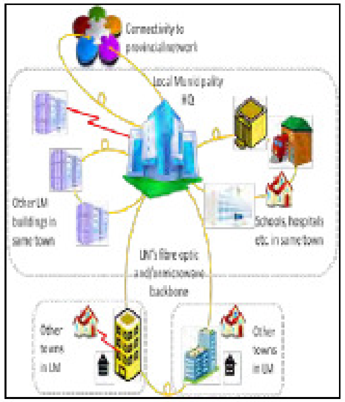
Infraco national network



Districts connected into provincial backbone



Local Municipal Network



SIP 15: Expanding access to communication technology

Provide for 100% broadband coverage to all households by 2020 by establishing core Points of Presence (POP's) in district municipalities, extend new Infraco fibre networks across provinces linking districts, establish POP's and fibre connectivity at local level, and further penetrate the network into deep rural areas.

While the private sector will invest in ICT infrastructure for urban and corporate networks, government will co-invest for township and rural access as well as for e-government, school and health connectivity.

The school rollout focus initially on the 125 Dinaledii (science and math focussed) schools and 1525 district schools. Part of digital access to all South Africans includes TV migration nationally from analogue to digital broadcasting.

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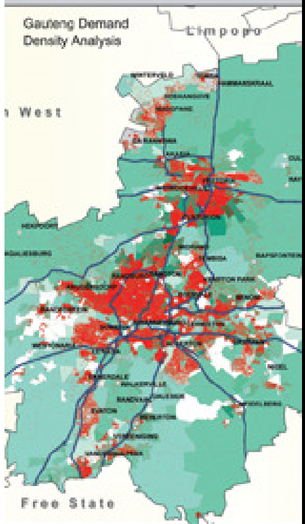

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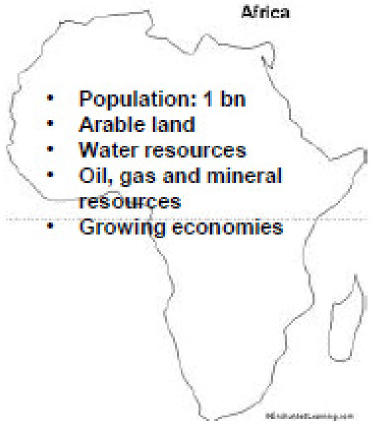
SIPS - Summary

Regional SIPS



- Population: 1 bn
- Arable land
- Water resources
- Oil, gas and mineral resources
- Growing economies

Bulk water resources: Lesotho Highlands

Transport: Regional interconnectors

Electricity Transmission: Mozambique (Cesul)

Hydro Power: DRC (Grand Inga), Zambia Lesotho and Mozambique (Mphanda Nkuwa)

SIP 17: Regional Integration for African cooperation and development

Participate in mutually beneficial infrastructure projects to unlock long term socio-economic benefits by partnering with fast growing African economies with projected growth ranging between 3% and 10%.

The projects involving transport, water and energy also provide competitively priced diversified, short, medium to long term options for the South African economy where for example, electricity transmission in Mozambique (Cesul) could assist in provided cheap, clean hydro power in the short term whilst Grand Inga in the DRC is long term.

All these projects complement the Free Trade Area (FTA) to create a market of 600 million people in South, Central and East Africa.

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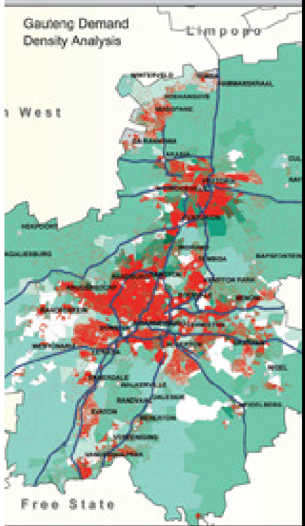

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MACRO POLICY GUIDELINES

NATIONAL INFRASTRUCTURE PLAN

According to Part 5: of the National Infrastructure Plan (Driving Job Creation & Industrialisation), the following industrial development focus areas has been identified:

- Mining And Processing
- Industrial Inputs
- Component Manufacturing
- Rail Stock
- Agro-Processing
- Pharmaceuticals

DEMACON market studies

A New Edge to Market Research

MESO POLICY GUIDELINES

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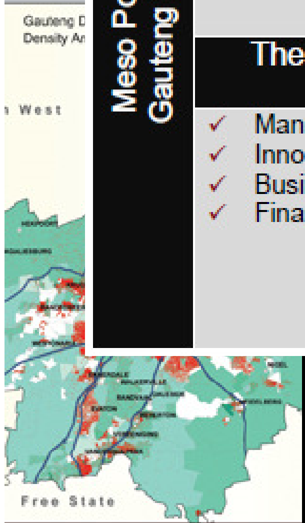

Meso Policies – Gauteng Province

Gauteng Spatial Development Framework, 2010	Gauteng Employment Grow and Development Strategy, 2009-2014	The Gauteng Global City Region Strategy
✓ Manufacturing sector ✓ Province as the smart centre ✓ Finance and business services sectors	✓ Innovative economy: Science and technology innovation, socio-economic innovation, environmental innovation ✓ Green economy: Green processes and products ✓ Inclusive economy: Accessibility, connectivity and interaction made possible by infrastructure investments	✓ Mining, ✓ Manufacturing, ✓ Financial and business services, ✓ Innovation and trade.
The Gauteng Trade and Industry Strategy, 2003	**The Gauteng Industrial Policy Framework, 2010 - 2014**	
✓ Manufacturing ✓ Innovation ✓ Business tourism ✓ Financial services	✓ Food and beverages - Including agro-processing ✓ Furniture ✓ Construction ✓ Machinery and Equipment - Specific emphasis on manufacturing of power boilers, valves and pumps ✓ Automotive and Components	

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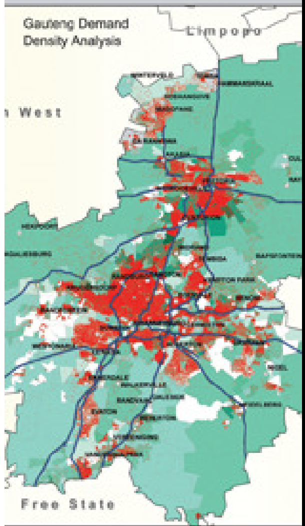

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MICRO POLICY GUIDELINES

Meso Policies – West Rand District Municipality

West Rand District: Vision 2016 and the Green IQ	**WRDM Regional Spatial Development Framework**
✓ Green economy ✓ Technology and innovation	✓ Infrastructure development ✓ Social and community development ✓ Environmental development
WRDM Local Economic Development Strategy	**WRDM – Marketing and Investment Strategy**
✓ Expansion of the Agricultural Sector ✓ Industrial and Beneficiation Development ✓ Waste Recycling/Processing ✓ SMME Development and Support Centre ✓ Human Resource Development ✓ Tourism Development	✓ Tourism ✓ Agriculture and agro-processing ✓ Mining and mineral processing and beneficiation ✓ Manufacturing
WRDM Regional Growth and Development Strategy	**WRDM Regional Economic Development Plan**
✓ Mining ✓ Agriculture ✓ Tourism ✓ Green economy	✓ Intensive Agriculture Development ✓ Tourism Diversification and Development ✓ Green Economy ✓ Agro-Processing ✓ Smme Development ✓ Lanseria Nodal Development

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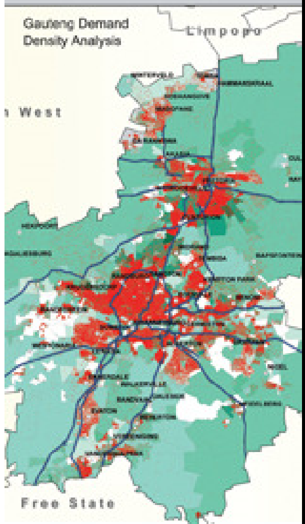

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MICRO POLICY GUIDELINES

Micro Policies – Local Municipalities	Merafong City Local Municipality Spatial Development Framework	Mogale City Local Municipality Spatial Development Framework
	✓ Industrial / manufacturing - steel fabrication, agro-processing. ✓ Diversification away from mining - beneficiation of mining by-products such as wood, stone and the refining of old mine tailings for gold and uranium. ✓ Agriculture beneficiation ✓ Tourism ✓ Metallurgical. ✓ Construction ✓ Waste (recycling)	✓ Agriculture ✓ Tourism ✓ Industrial
	Randfontein Local Municipality Spatial Development Framework	**Westonaria Local Municipality Spatial Development Framework**
	✓ Agriculture ✓ Infrastructure	✓ No SDF available

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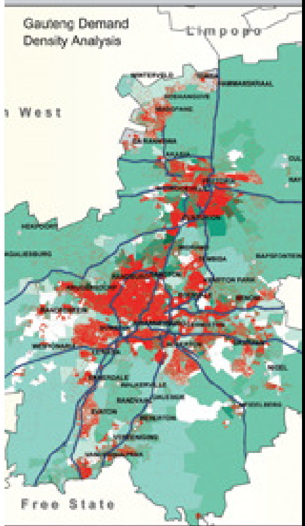

INDUSTRIAL LOCATION FACTORS

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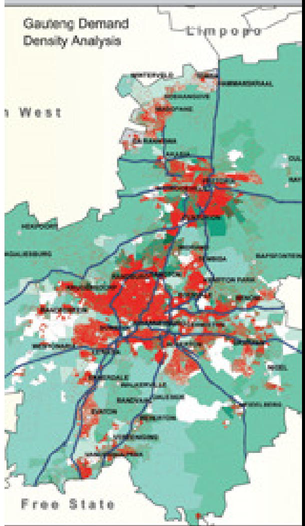

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INDUSTRIAL LOCATION FACTORS

- The theory of industrial location identifies five major factors that influence the choice of the location of individual economic activity, namely (in *quasi* priority order):
  - Resource Orientation
  - Market Orientation
  - Logistics Orientation
  - Agglomerative Economy Orientation
  - Labour Orientation
- Industrial activity on the West Rand has a strong historical correlation to gold mining activity.

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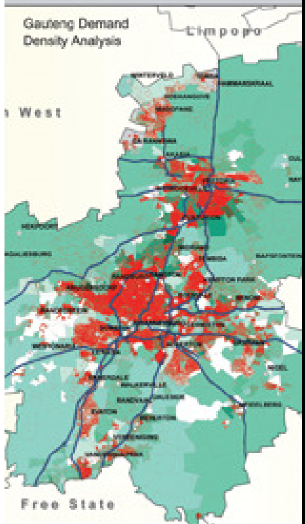

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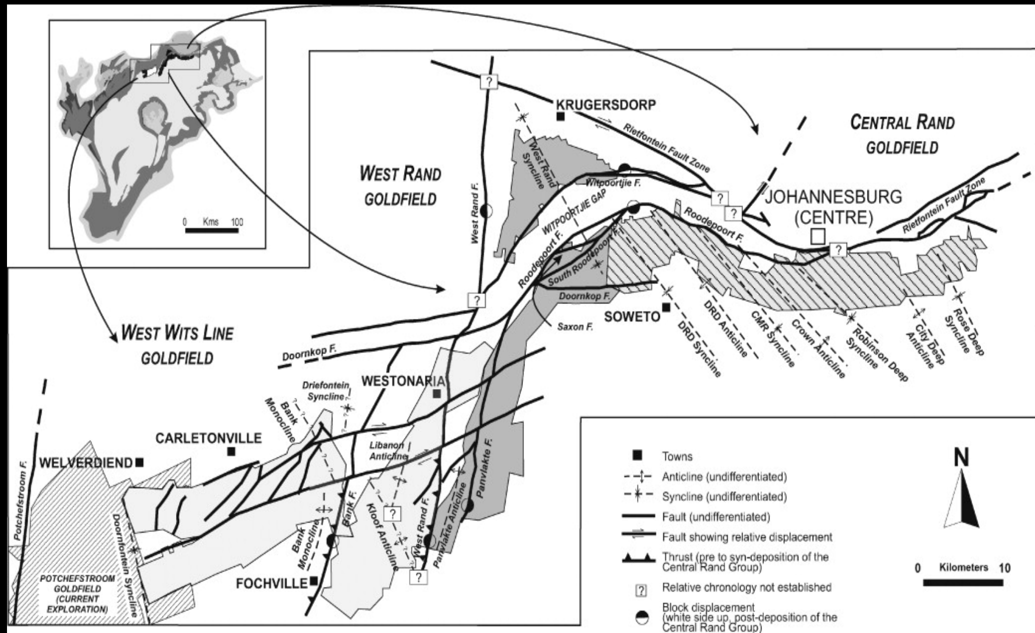
INDUSTRIAL LOCATION FACTORS

RESOURCE ORIENTATION

The criteria normally utilised are:

- Location near primary resource.
- Reduce the transportation costs
- Industrial activities that benefit from primary resource extractors - first stage resource users.
- Firms with a resource orientation also include producers that utilise products of first stage resource users.



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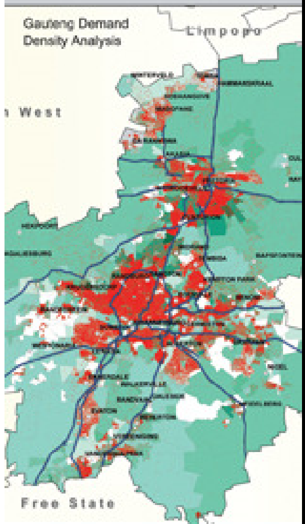

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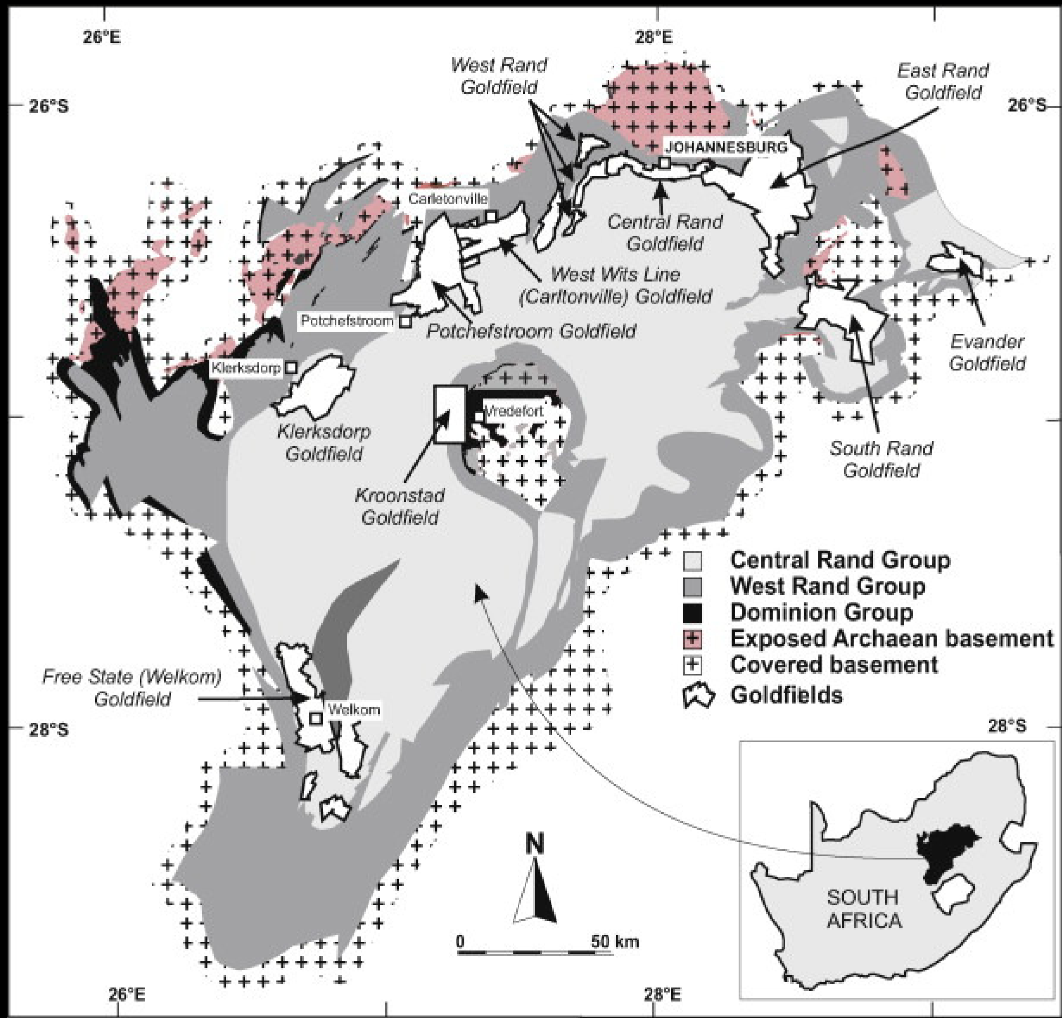
WEST RAND GOLD FIELDS

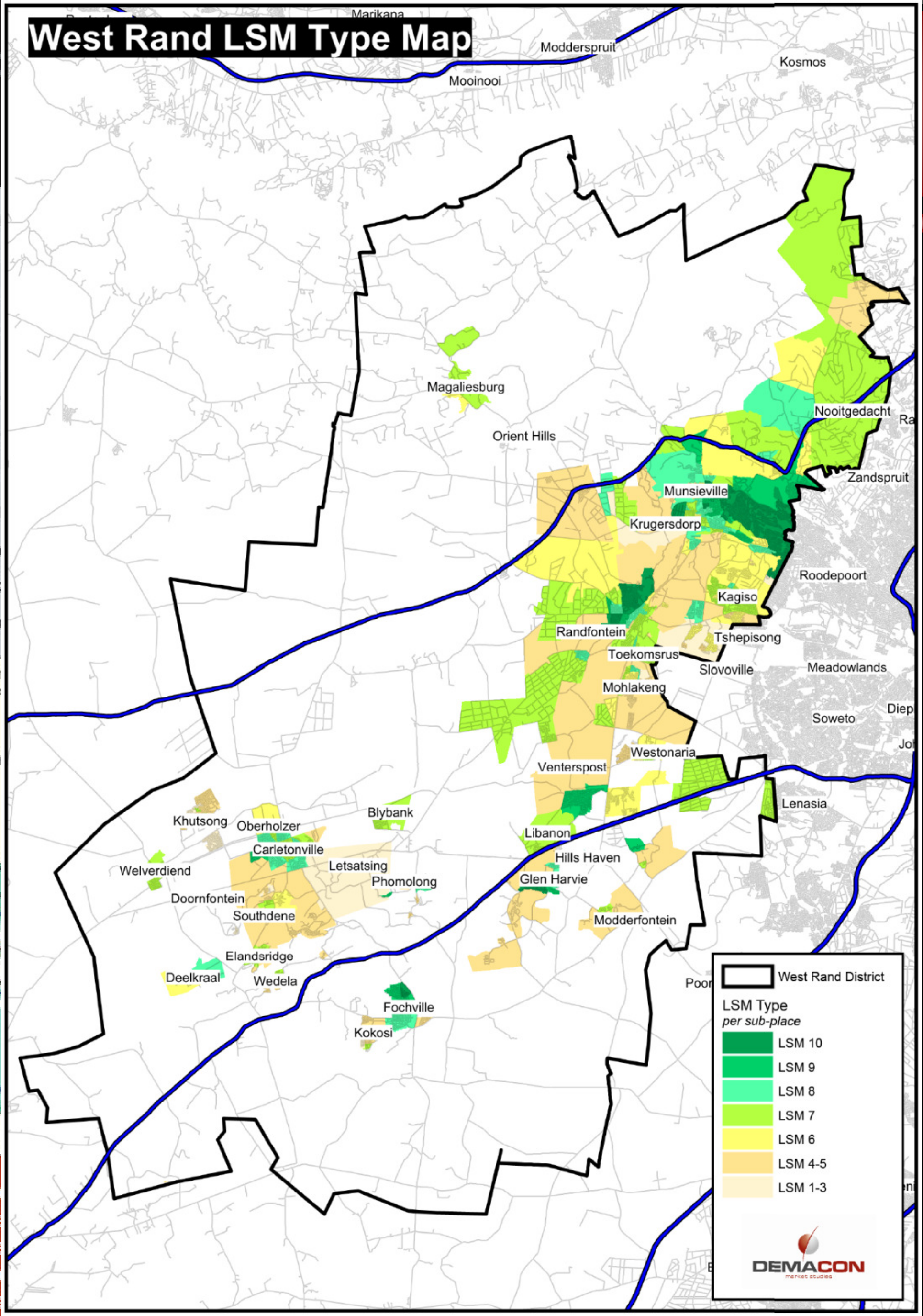
The most predominant mining houses located within the West Rand include:

- Harmony Gold
- DRD Gold
- Anglogold Ashanti
- Goldfieds
- West Wits Mining
- Sibanys Gold

The map indicates the Witwatersrand Basin with Ventersdorp Supergroup, Transvaal Basin sequences and Karoo Supergroup.



INDUSTRIAL LOCATION FACTORS

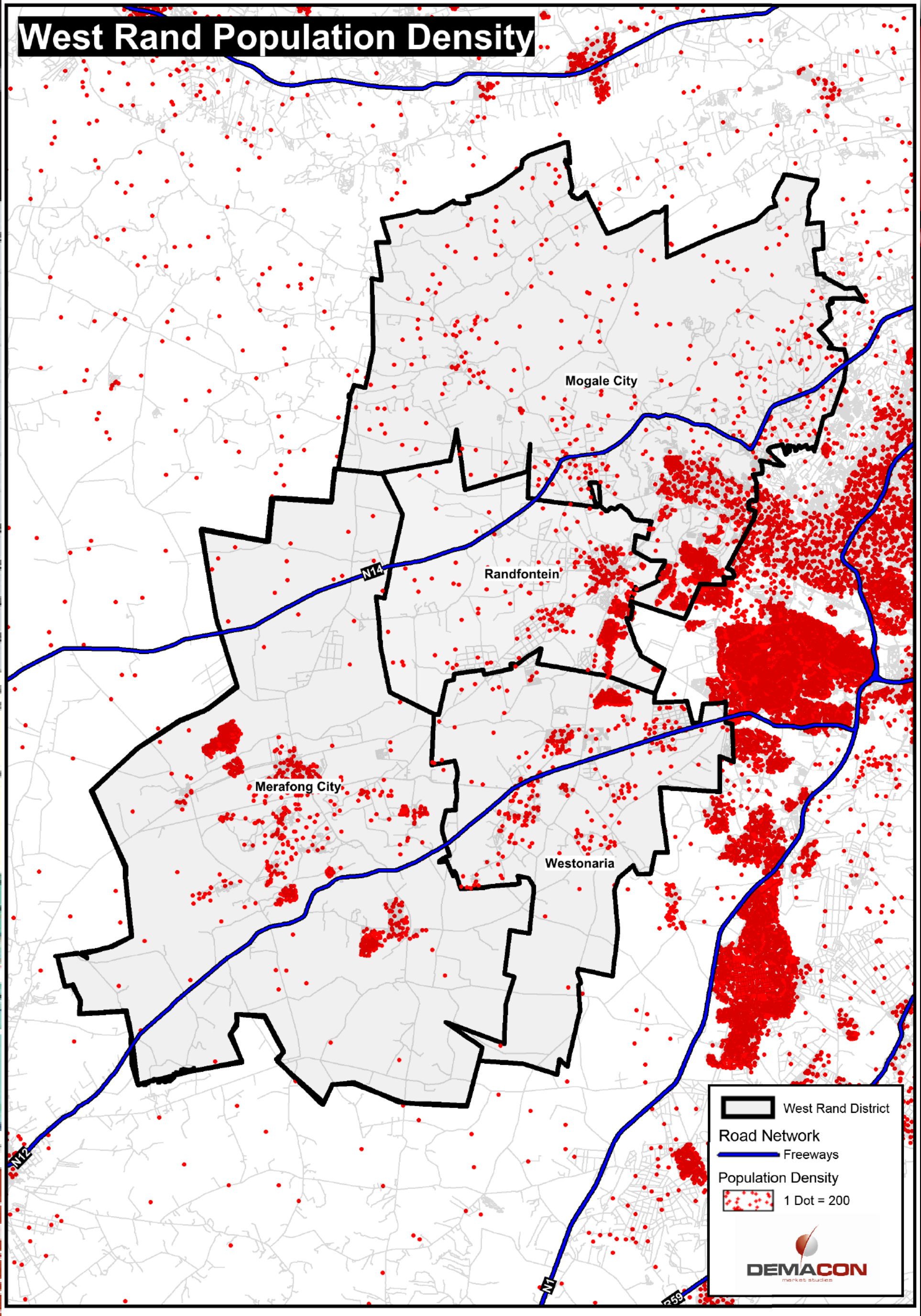


LABOUR ORIENTATION

Labour orientation is influenced by a number of interrelated factors such as:

- Wage levels
- Productivity
- Turnover and work stoppage rates
- Supply of adequately skilled labour
- Labour laws

(LSM as quasi indicator of labour force skills levels & competitiveness).



INDUSTRIAL LOCATION FACTORS

MARKET ORIENTATION

The criteria normally utilised are:

- Population concentrations correlate positively with demand concentrations
- Level of economic activity
- Availability of infrastructure
- Strategic location of development corridors
- Economic development potential

(Ideally needs to be interpreted in tandem with LSM)

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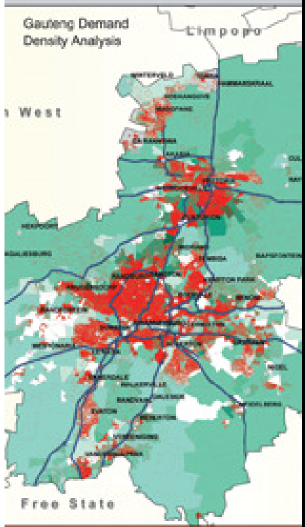

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INDUSTRIAL LOCATION FACTORS

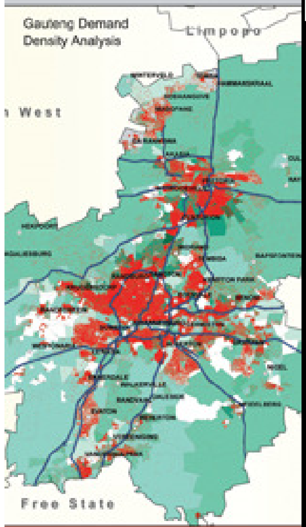
AGGLOMERATIVE ECONOMY ORIENTATION

There are two prominent and distinct types of agglomeration and these are:

- Localisation economies: Applies to all firms in a particular industry that tend to locate together. This is motivated by factors such as factor input/output materials source and forward and backward linkages with auxiliary industries in the same locality.

- Urban concentration economies: These benefit all firms in all industries as a result of the following:
  - Large market
  - Large pool of skilled labour
  - Commercial and financial services and other support services.

INDUSTRIAL LOCATION FACTORS



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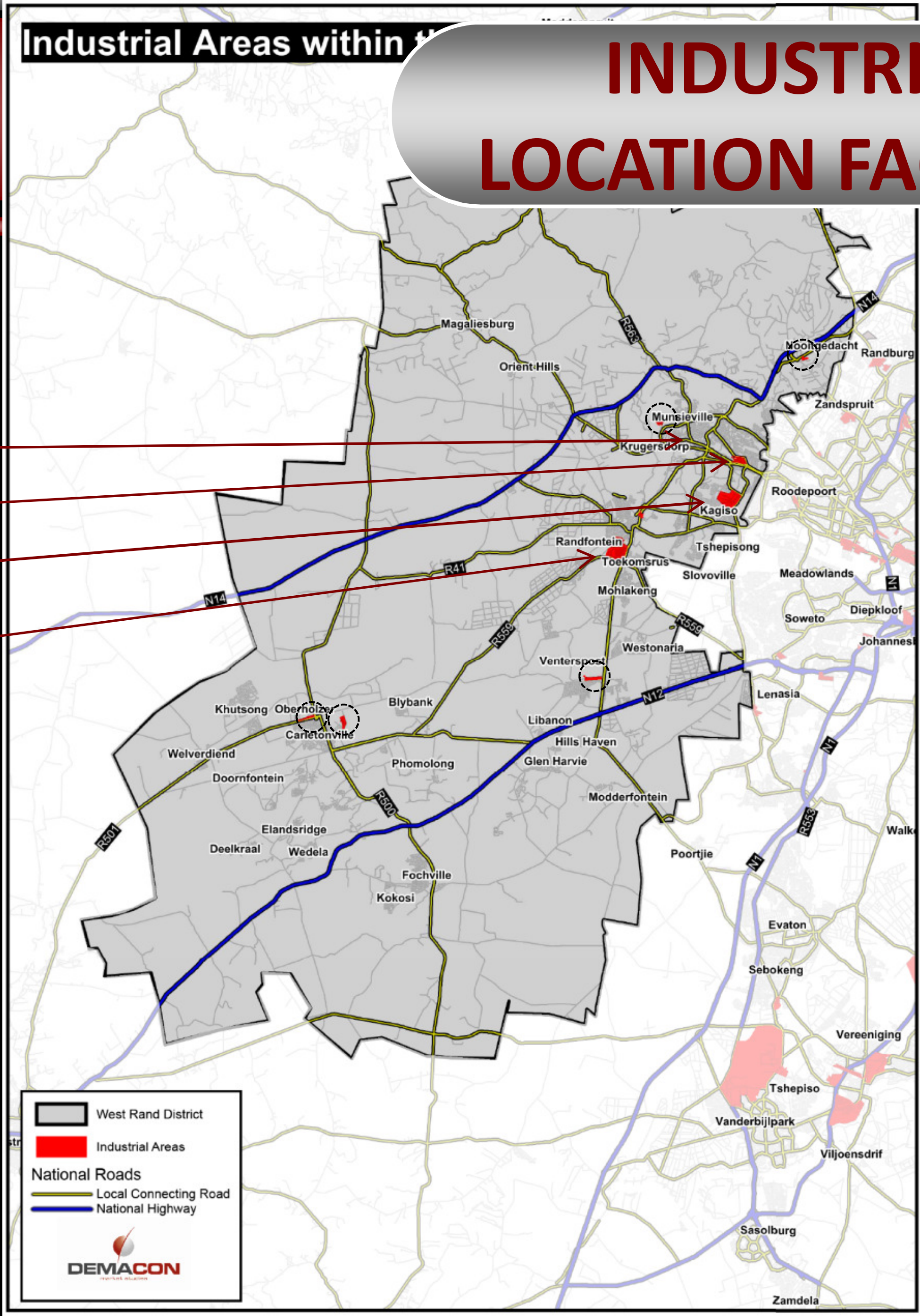
Boltania

Factoria

Chamdor

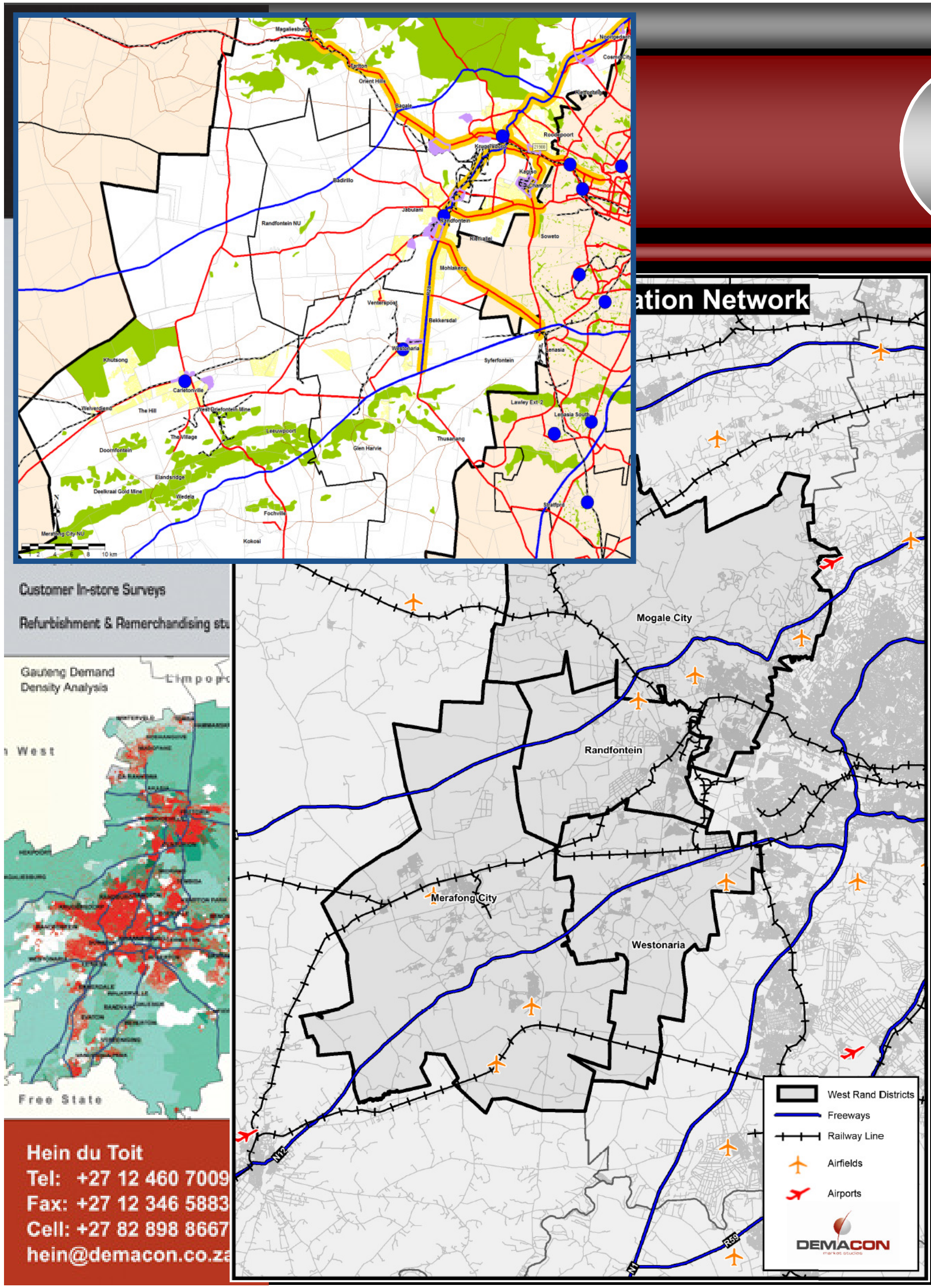
Randfontein: Delporton / Aureus



AGGLOMERATION ORIENTATION

Spatial clustering of existing industrial n nodes.

INDUSTRIAL LOCATION FACTORS



LOGISTICS ORIENTATION

The criteria normally utilised are:

- Logistics can be defined as an organisation of movement and relates to an integrated network of transportation, communications, distribution and auxiliary facilities and institutional arrangements that facilitate investment and the movement of goods and services.
- The networks include roads, bridges, railways, and air links.

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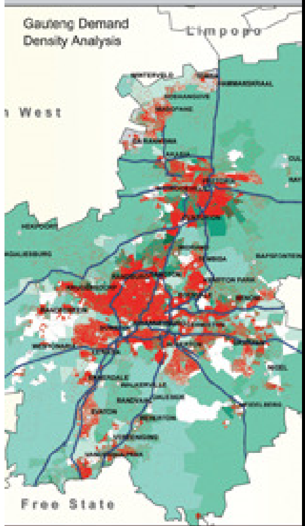

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Part 2

WEST RAND INDUSTRIAL NODES

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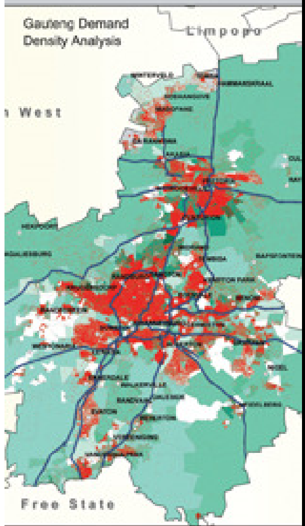

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INDUSTRIAL NODES

Industrial Nodes Analysis

- Mogale City LM
  - Boltonia
  - Chamdor
  - Delporton
  - Factoria
  - Fariaville
  - Muldersdrift
  - Nooitgedacht
- Merafong City LM
  - Carletonville Extension 6
  - Oberholzer
- Randfontein LM
  - Aureus
- Westonaria LM
  - Westonaria

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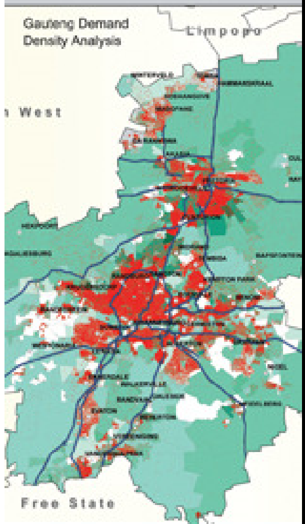

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Boltania

Factoria

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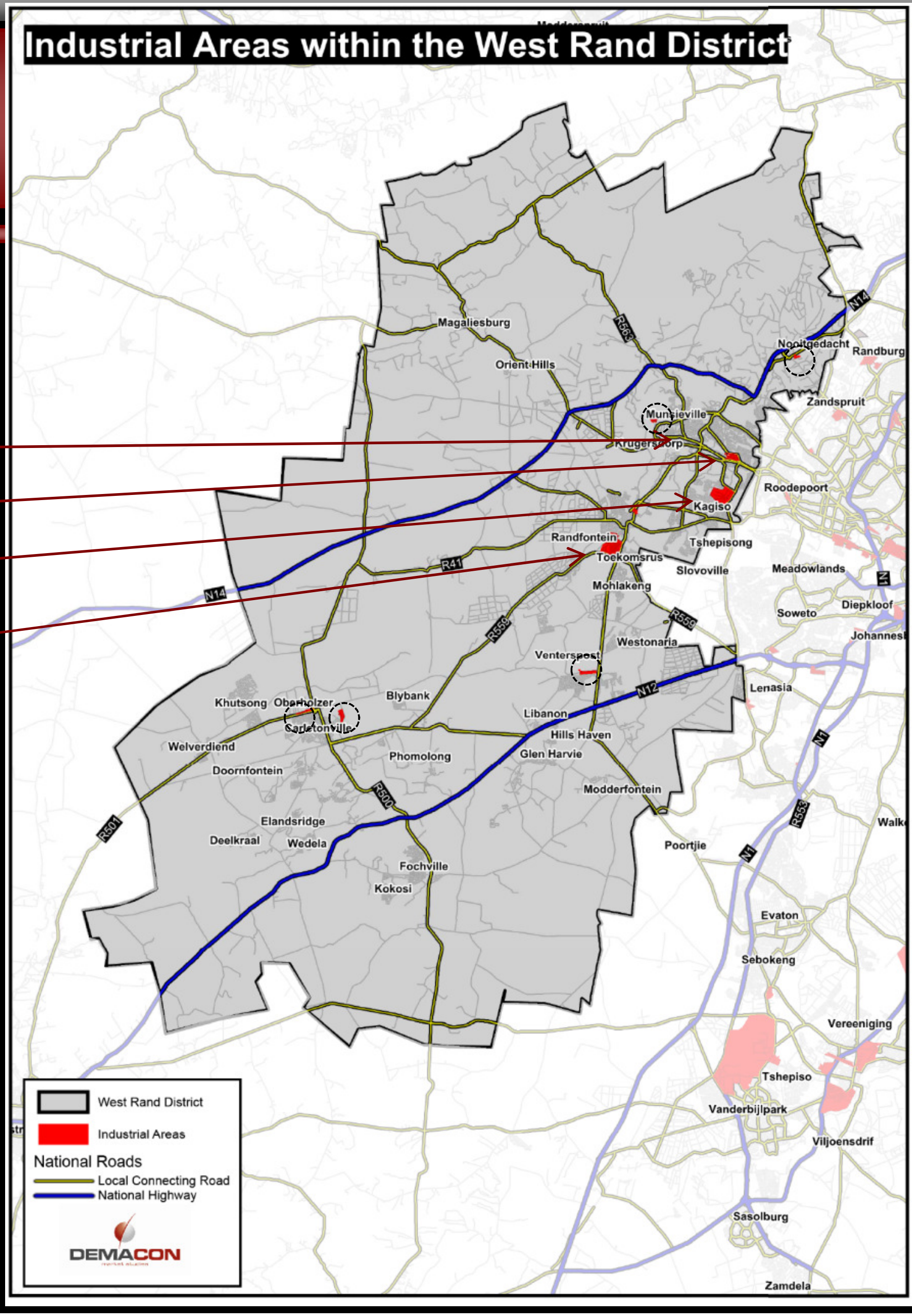

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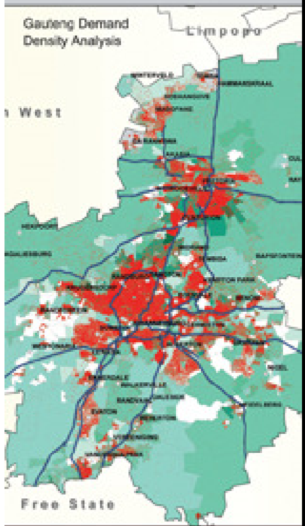

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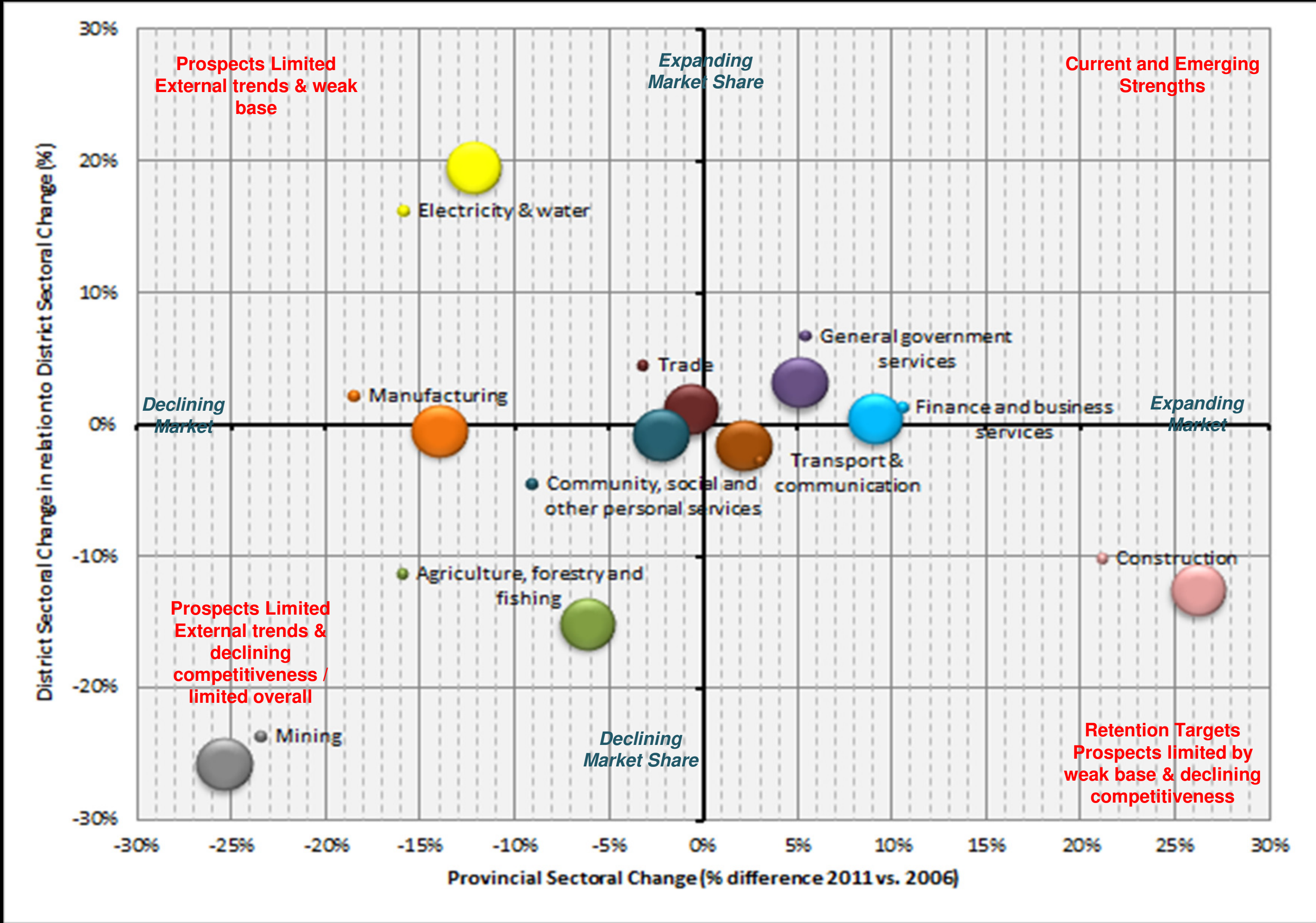
WEST RAND KEY SECTORS



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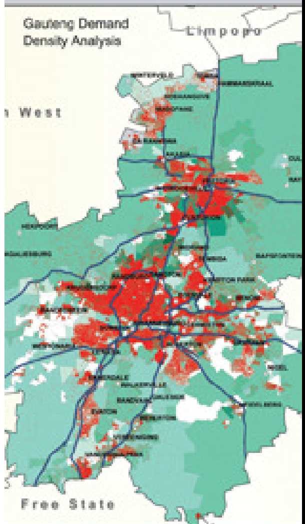

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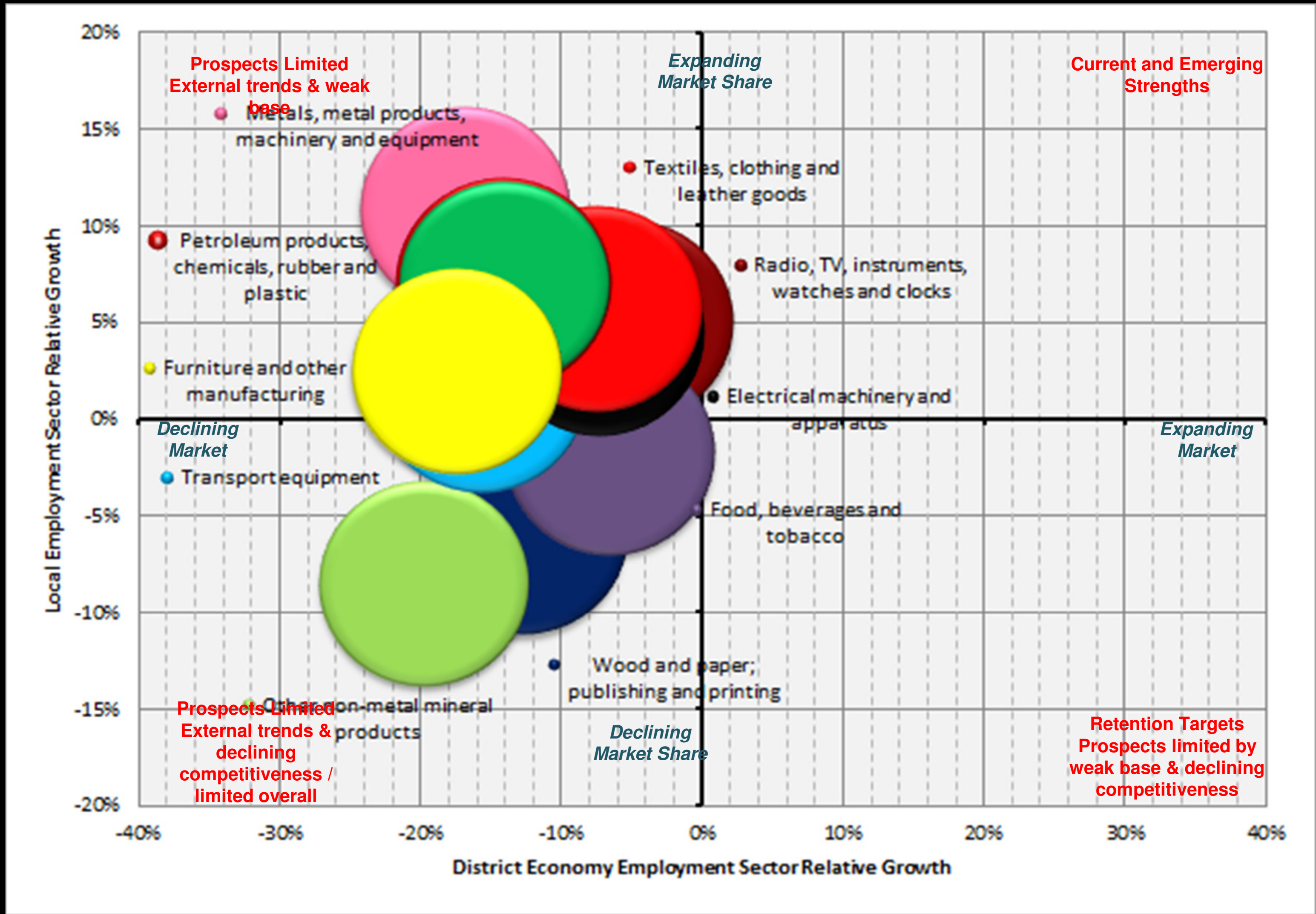
WEST RAND KEY SUB-SECTORS



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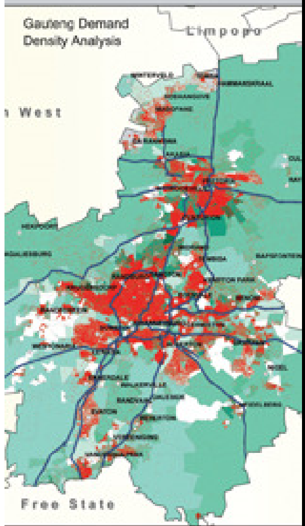

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WEST RAND KEY SECTORS AND SUB-SECTORS

	Main Sectors	Sub-sectors
Leading Sectors		
Current and Emerging Strengths ***LSRG leading (grow faster than district) and DG positive***	✓ Community, social and personal services ✓ General government services	✓ Other non-metal mineral products ✓ Community, social and personal services, other
Prospects limited by external trends and weak base ***LSRG leading (grow faster than district) and DG negative***	✓ None	✓ None
Lagging Sectors		
High priority retention target and prospects limited by weak base and declining competitiveness ***LSRG lagging (grow slower than district) and DG positive***	✓ Mining and quarrying ✓ Construction ✓ Wholesale and retail trade, catering and accommodation	✓ Food, beverages and tobacco ✓ Textiles, clothing and leather goods ✓ Water ✓ Wholesale and retail trade ✓ Transport and storage
Prospects limited by external trends and declining competitiveness and prospects limited overall ***LSRG lagging (grow slower than district) and DG negative***	✓ Agriculture, forestry and fishing ✓ Manufacturing ✓ Utilities ✓ Transport, storage and communication ✓ Finance, insurance, real estate and business services	✓ Wood, paper, publishing and printing ✓ Petroleum products, chemicals, rubber and plastic ✓ Metals, metal products, machinery and equipment ✓ Electrical machinery and apparatus ✓ Radio, TV, instruments, watches and clocks ✓ Transport equipment ✓ Furniture and other manufacturing ✓ Electricity ✓ Catering and accommodation services ✓ Communication ✓ Finance and insurance ✓ Business services

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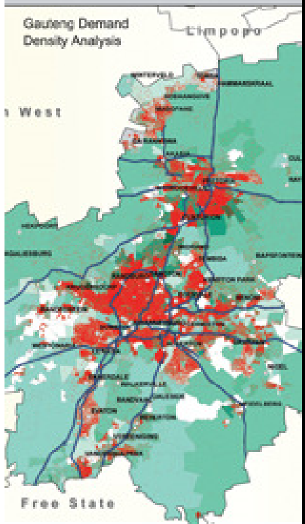

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WEST RAND INDUSTRIAL SURVEY OVERVIEW

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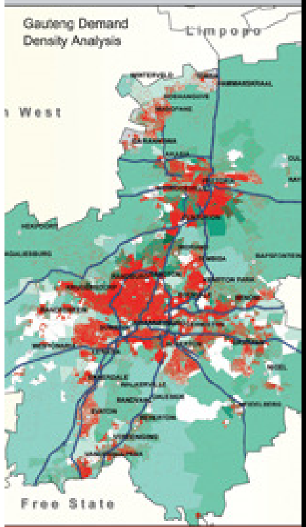

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WEST RAND INDUSTRIAL NODES

Land Use Clasification

- Industrial: Service Industries
  - Automotive Services / Repair Garages / Scrapyards
  - Wholesale / Hardware Stores / Building Material
  - Workshops / Light Manufacturing / Engineering Services
  - Mortuary / Funeral Parlour / Crematoria
  - Other Specialized Services

- Industrial: General Industries
  - Warehouse / Storage Buildings / Logistics
  - Transport / Vehicle Storage Depots / Containers
  - Construction Industry
  - General Manufacturing
  - General Engineering
  - General Equipment
  - Food / Beverages
  - Textiles / Leather
  - Mining Industry

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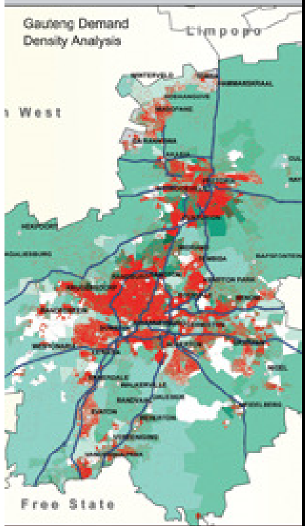

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WEST RAND INDUSTRIAL NODES

Land Use Clasification

- Heavy / Noxious Industries
  - Grain Milling / Animal Feeds / Oils
  - Petroleum / Gas / Oil / Lubricants
  - Recycling
  - Saw Milling / Timber Products
  - Manufacturing of Machinery / Equipment
  - Cement Products
  - Plastics / Rubber / Fibre Glass
  - Chemical Products
  - Steel Manufacturing

- Multi-Use

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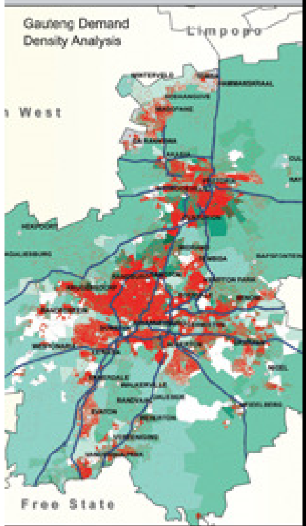

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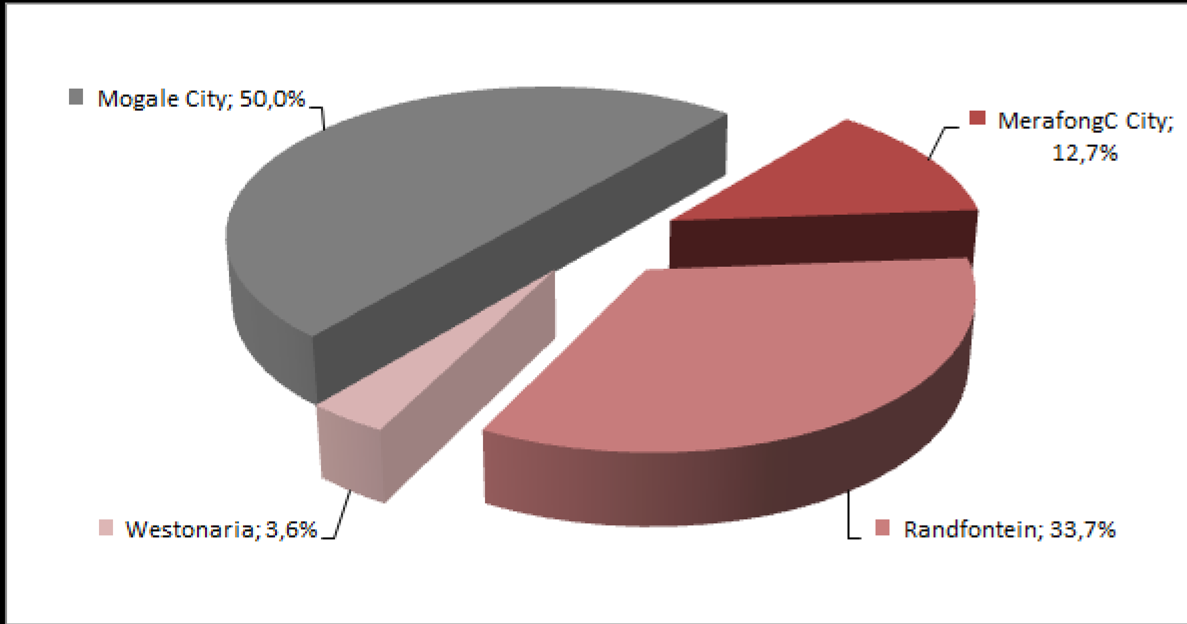
WEST RAND INDUSTRIAL NODES

West Rand Industrial Nodal Distribution (hectare)



- Mogale City – 7 Industrial areas (613 ha – excluding Fariaville)
- Randfontein – 1 Industrial Area (414 ha)
- Merafong – 2 Industrial area (156 ha)
- Westonaria – 1 Industrial area (44ha)

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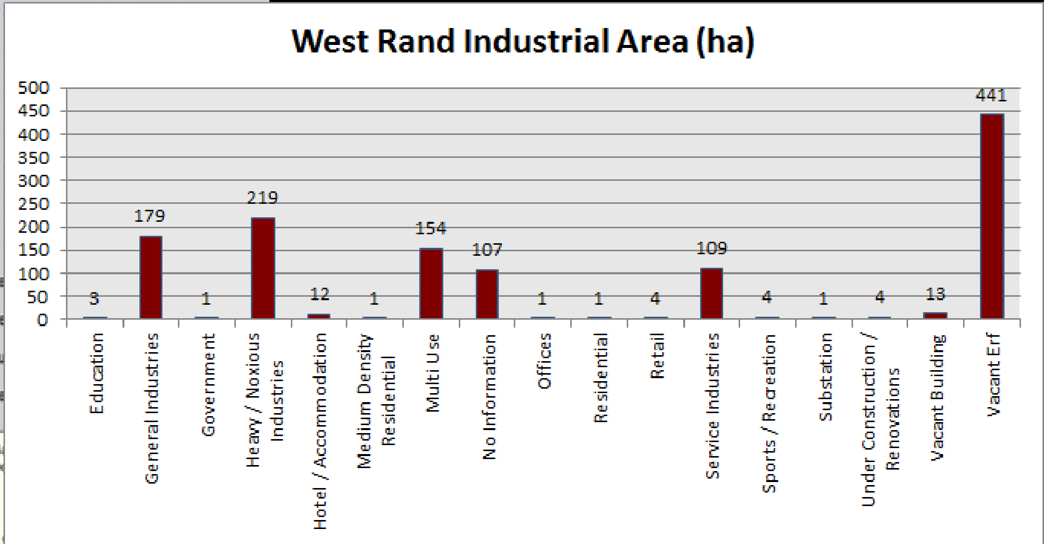
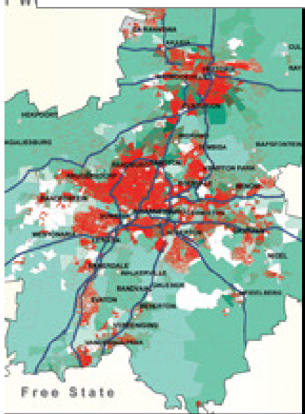
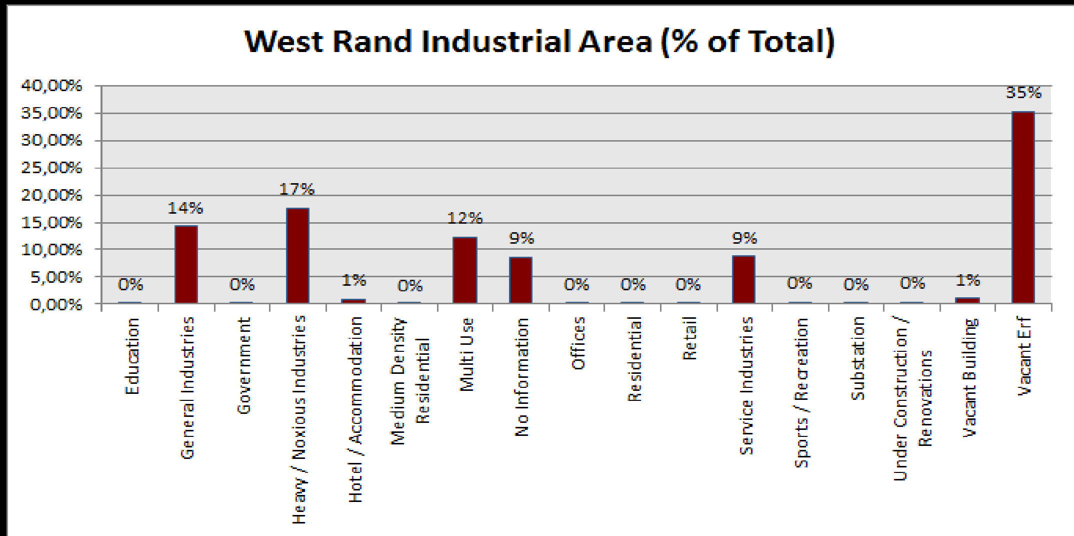


- Dominant Land Use:
  - Vacant (441ha / 35%)
  - Heavy / noxious industries (219 ha / 17%)
  - General industries (179ha / 14%)
  - Multi-use (154ha / 12%)
  - Service industries (109ha / 9%)



- West Rand Total Industrial Area: 1 245.8ha



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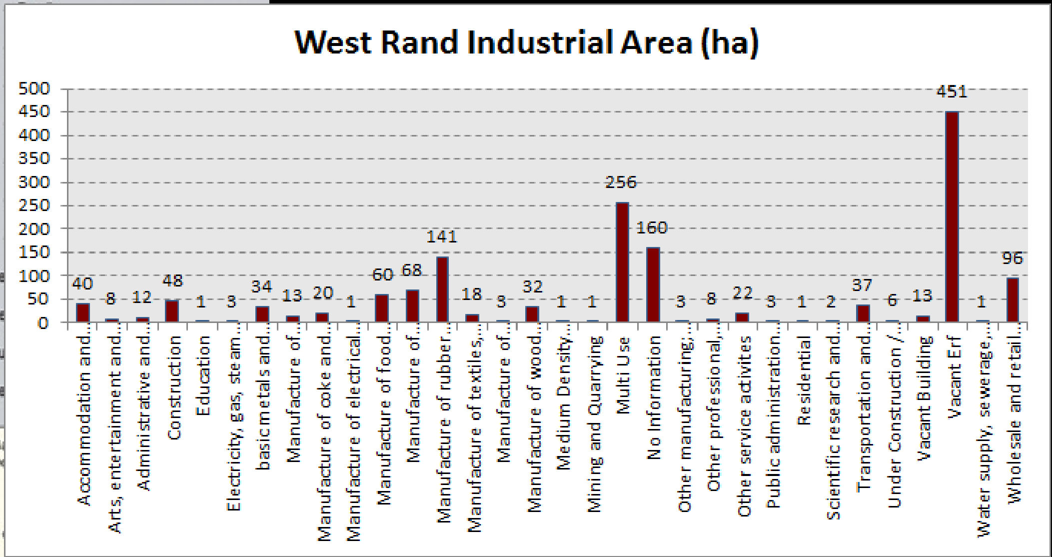
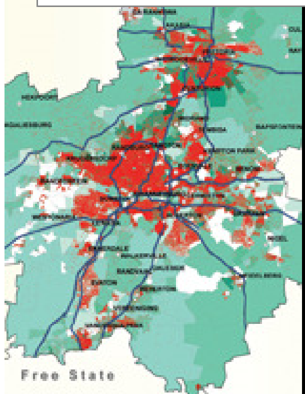


- Dominant Activity:
  - Vacant (451ha / 29%)
  - Multi-use (256ha / 16%)
  - Manufacture of rubber and plastic products, and other non-metallic mineral products (141ha / 9%)
  - Wholesale and retail trade, repair of motor vehicles and motorcycles (96ha / 6%)



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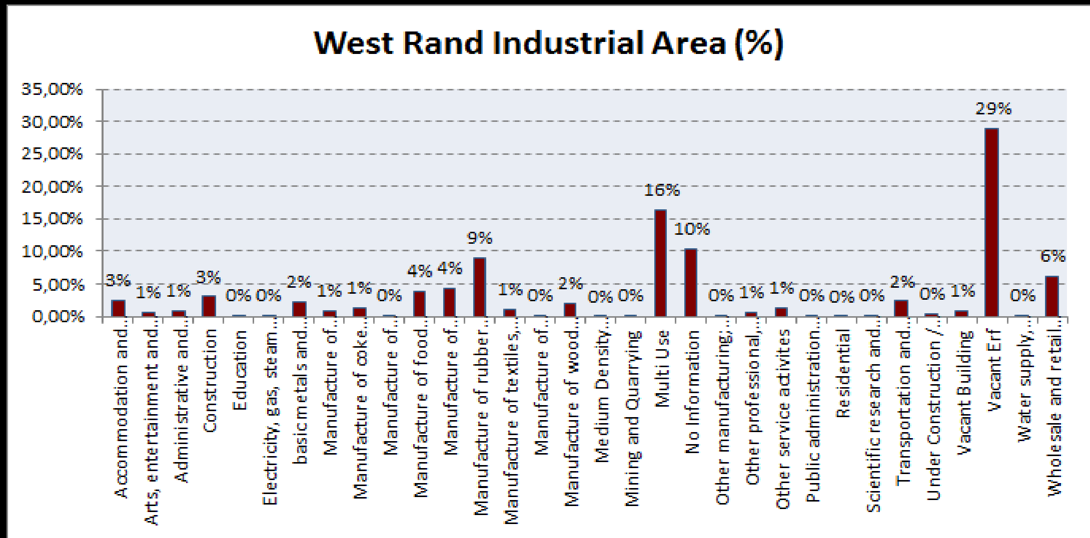

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WEST RAND INDUSTRIAL NODES

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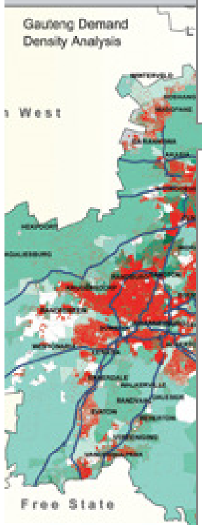

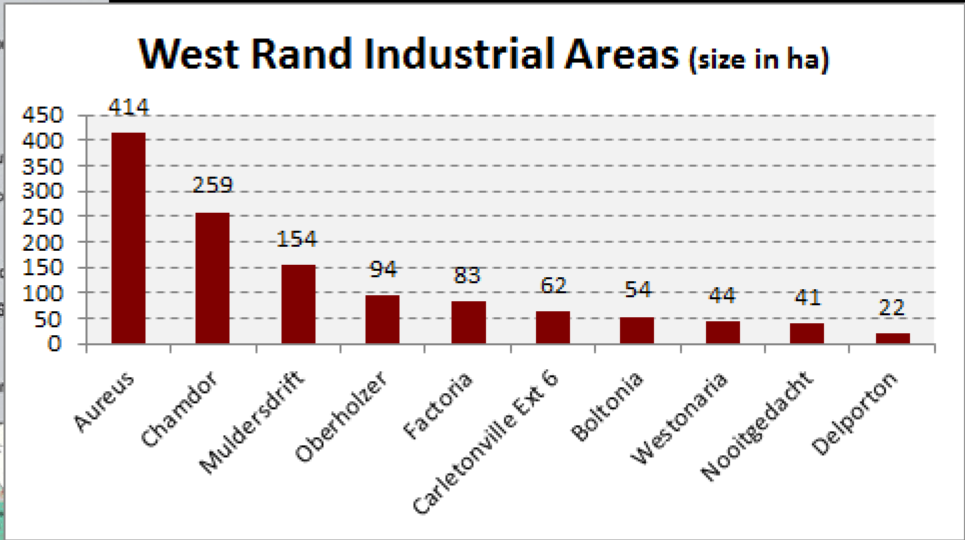

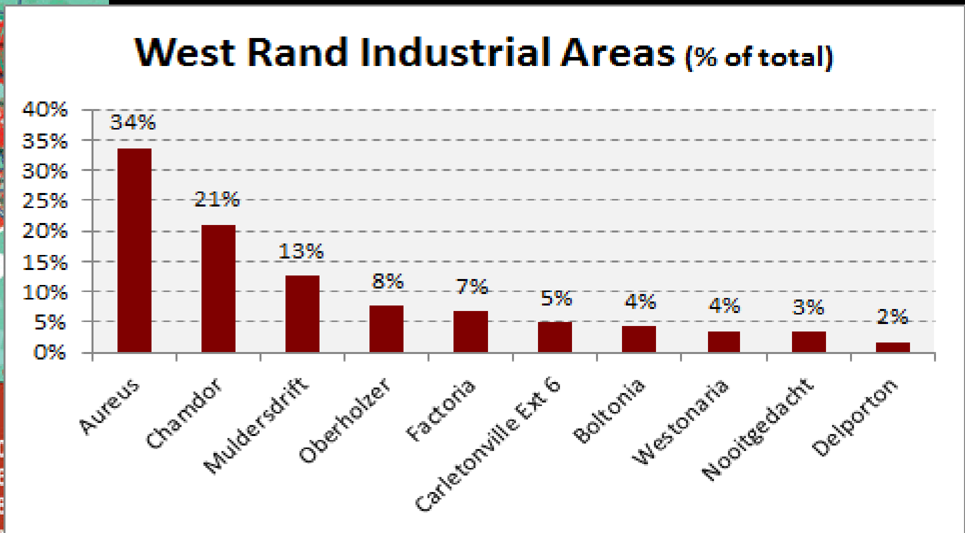

West Rand Industrial Nodes According to land area (ha) - Excluding Fariaville

- Aureus (414ha)
- Chamdor (259ha)
- Muldersdrift (154ha)
- Oberholzer (94ha)
- Factoria (83)
- Carletonville Ext 6 (62ha)
- Boltonia (54ha)
- Westonaria (44ha)
- Nooitgedacht (41ha)
- Delporton (22ha)

- *Fariaville 323ha – vacant*

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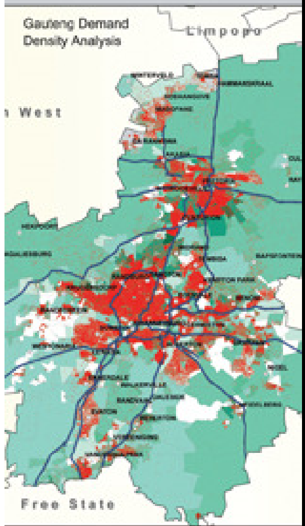

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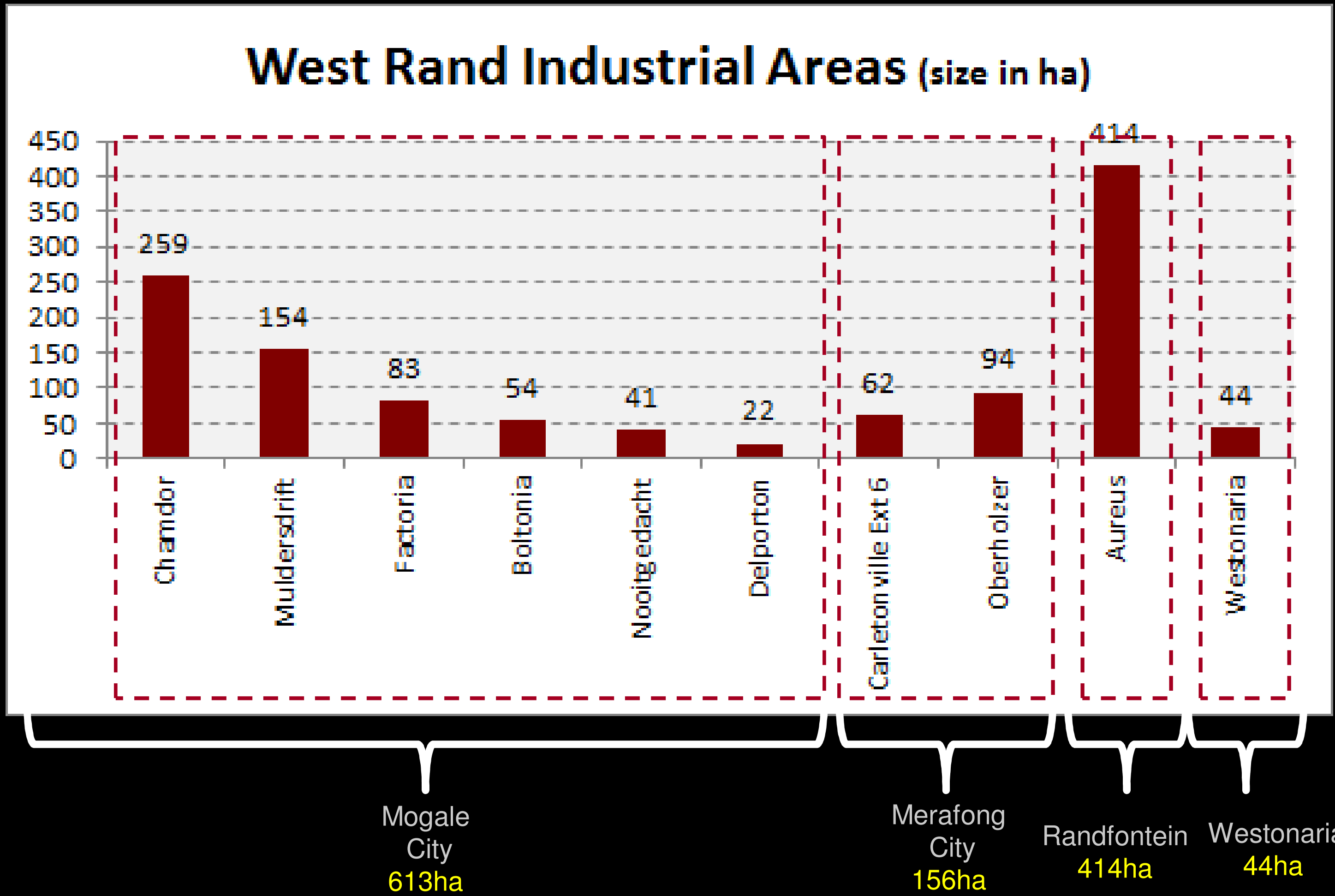
WEST RAND INDUSTRIAL NODES



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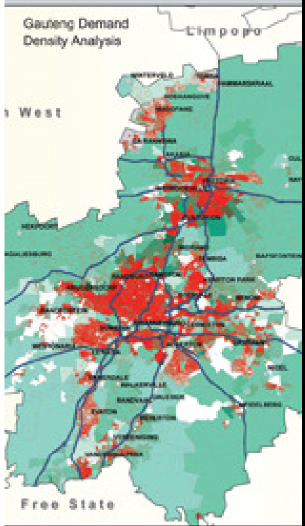

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WEST RAND INDUSTRIAL NODES

Industrial Nodes Analysis

- **Mogale City LM**
  - Boltonia - Manufacture of food products, beverages and tobacco products
  - Chamdor - Manufacture of machinery and equipment
  - Delporton - Manufacture of food products, beverages and tobacco products
  - Factoria - Manufacture of basic metals and fabricated metal products except machinery and equipment
  - Fariaville – Vacant
  - Muldersdrift – Manufacture of rubber and plastic products, and other non-metallic mineral products
  - Nooitgedacht – Construction
- **Merafong City LM**
  - Carletonville Extension 6 -Manufacture of machinery and equipment
  - Oberholzer - Other service activities
- **Randfontein LM**
  - Aureus - Manufacture of rubber and plastic products, and other non-metallic mineral products
- **Westonaria LM**
  - Westonaria - Manufacture of rubber and plastic products, and other non-metallic mineral products

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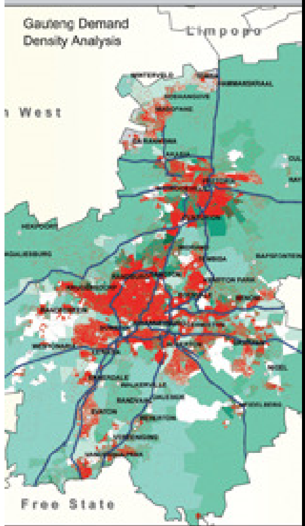

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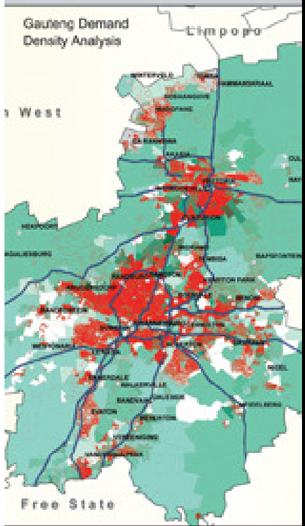
MOGALE CITY LOCAL MUNICIPALITY

- Mogale Industrial Sector and Sub-Sector Competitiveness Analysis
- Nodal Analysis



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MOGALE CITY LM – BACKGROUND

- Mogale City was formerly a mining city founded in 1887 by Marthinus Pretorius and Krugersdorp was named after Paul Kruger.
- This is the site of the December 1880 gathering at which more than 6,000 men vowed to fight for the Transvaal's independence.
- When gold was discovered on the Witwatersrand, a need arose for a major town in the west of the reef.
- The government bought part of the farm Paardekraal and named the new town after the Transvaal President Paul Kruger.
- In 1952 the West Rand Consolidated Mine was the first in the world to extract uranium as a by-product of the gold refining process.
- Mogale City includes Krugersdorp, Azaadville, Munsieville, Kagiso, Tarlton, Hekpoort and surrounds, stretching into Magaliesberg.
- Apart from gold, manganese, iron, asbestos and lime are also mined in the area.

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MOGALE CITY INDUSTRIAL NODES

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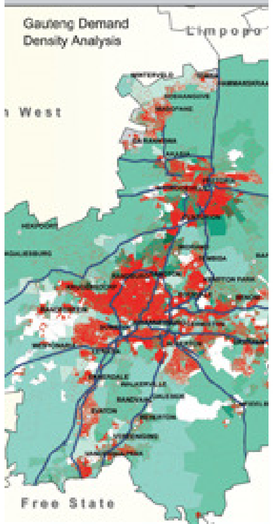

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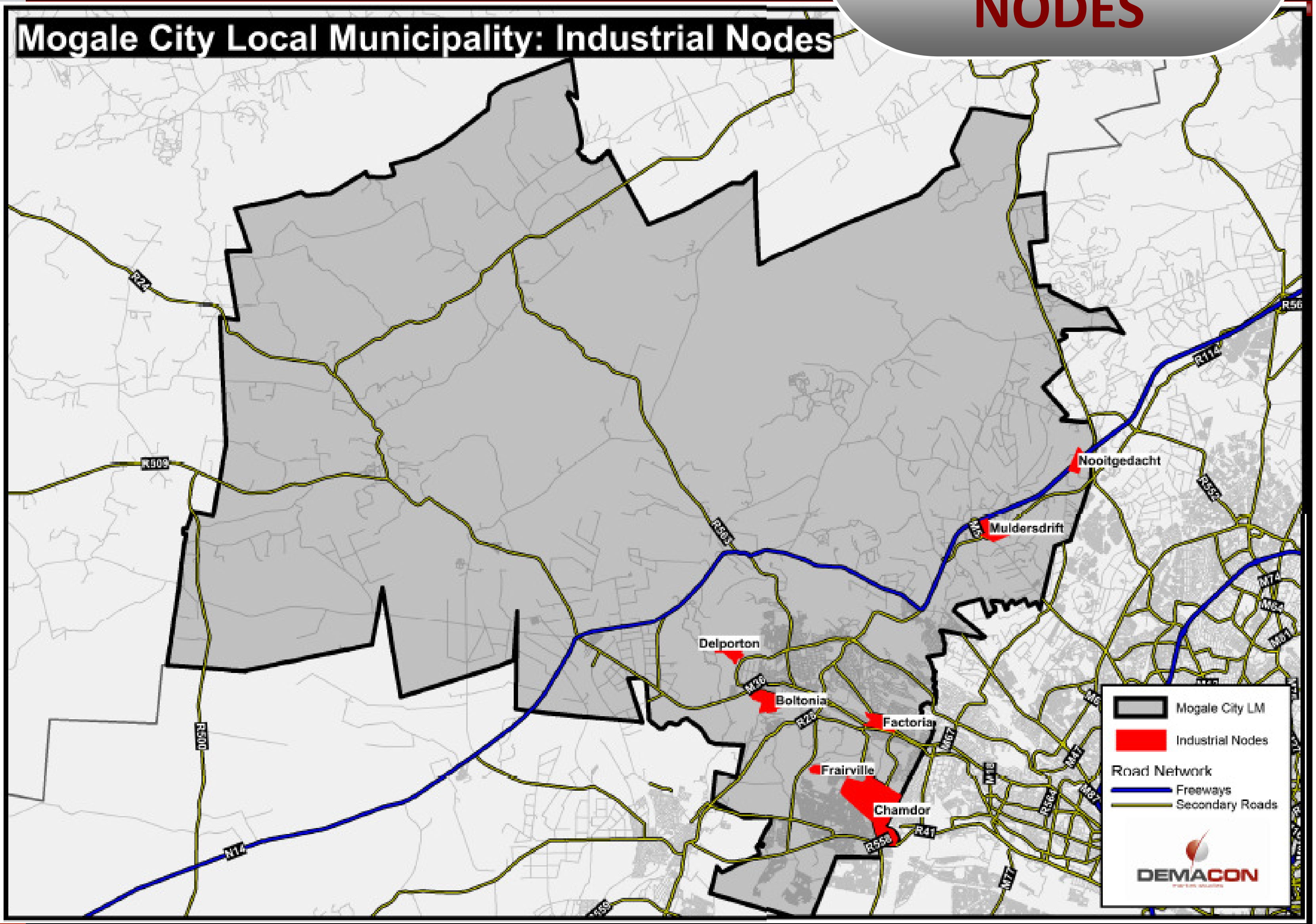

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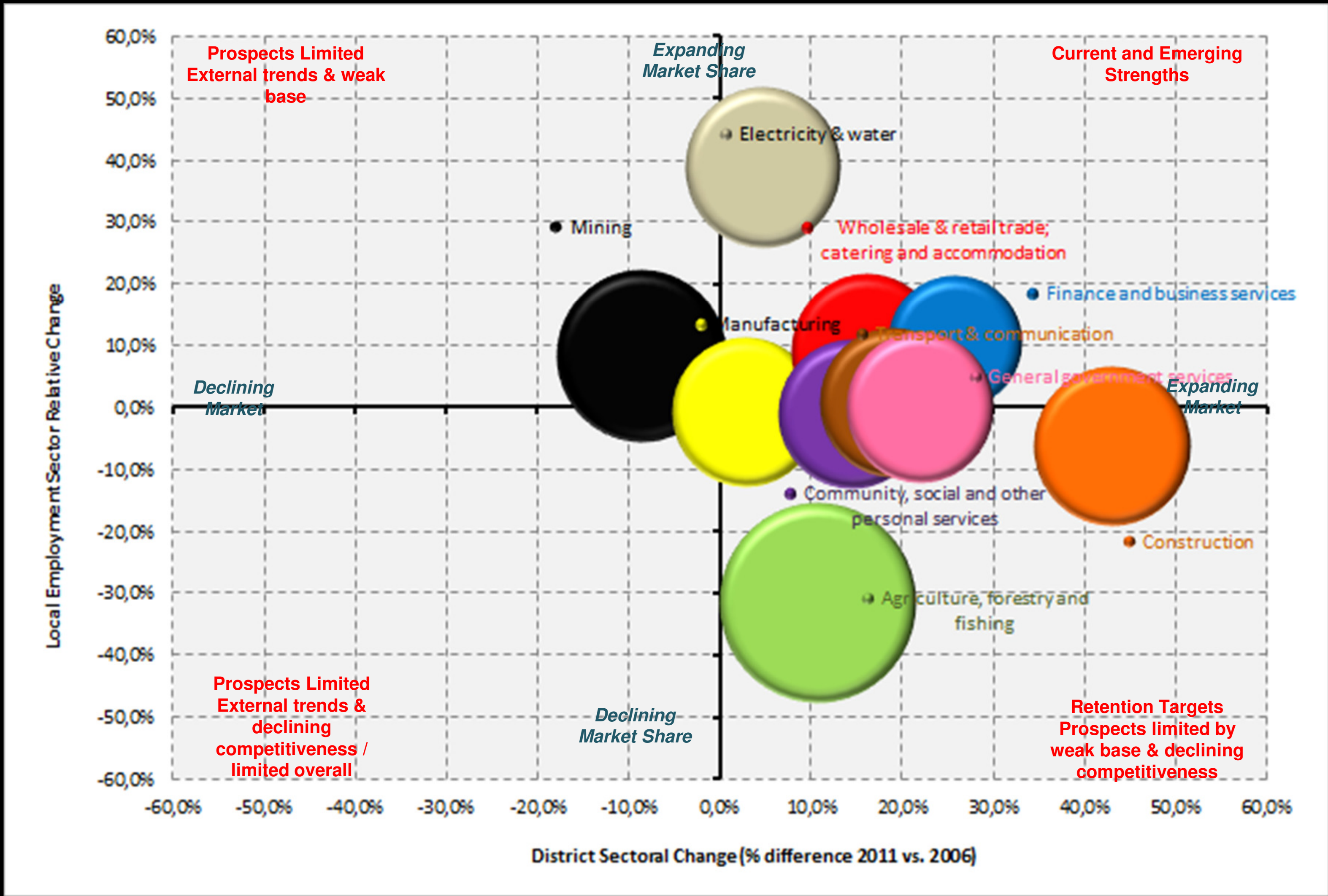
MOGALE CITY KEY SECTORS



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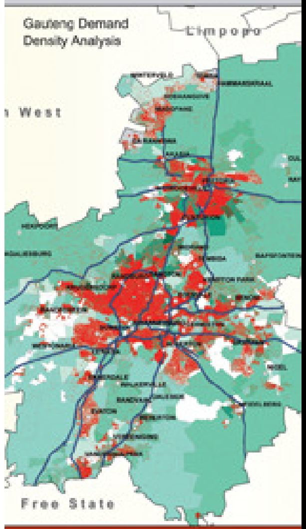

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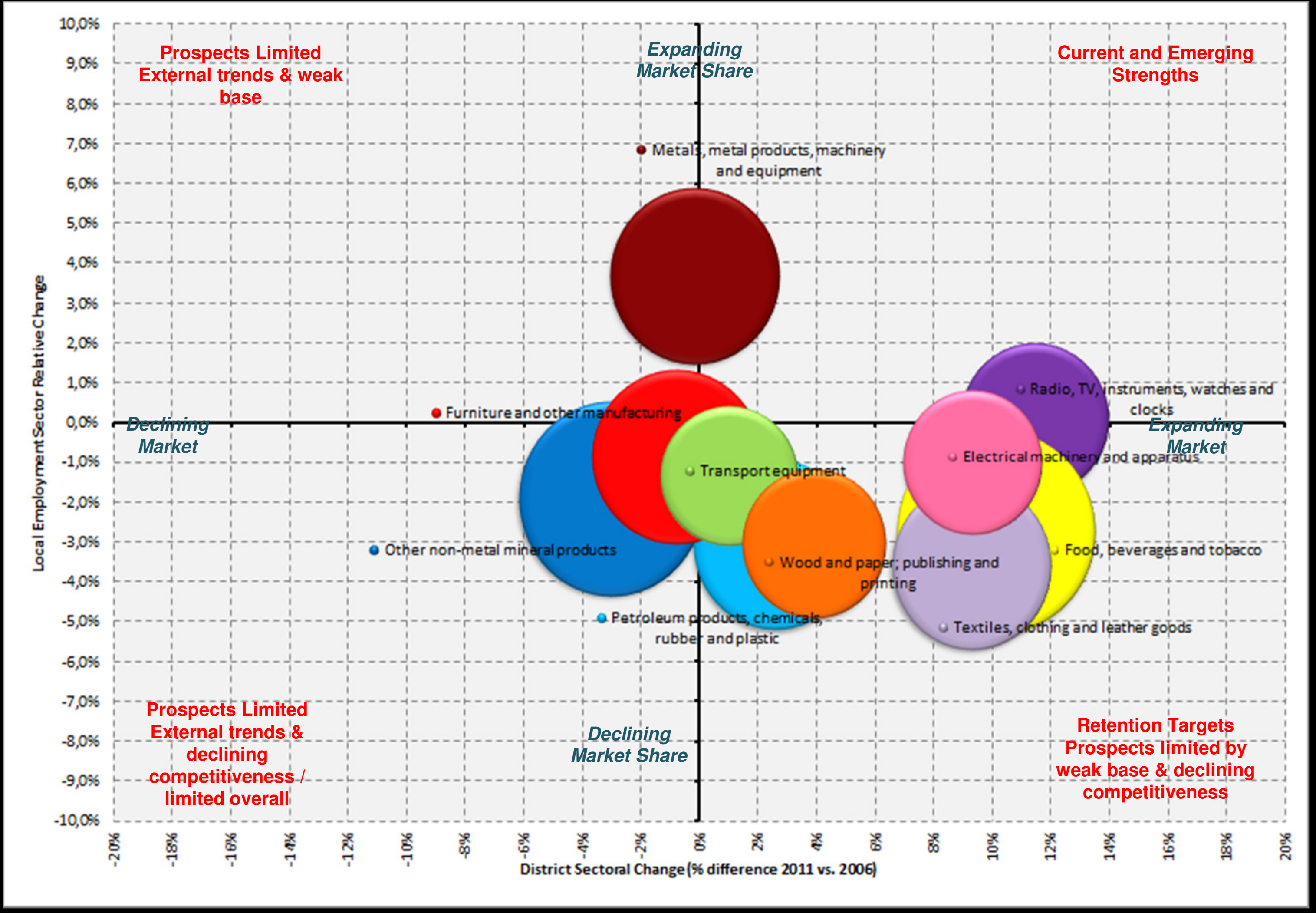
MOGALE CITY KEY SUB-SECTORS



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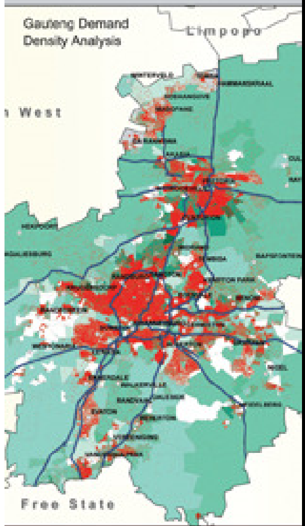

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MOGALE CITY KEY SECTORS AND SUB-SECTORS

	Main Sectors	Sub-sectors
Leading Sectors		
Current and Emerging Strengths ***LSRG leading (grow faster than district) and DG positive***	✓ Utilities ✓ Wholesale and retail trade, catering and accommodation ✓ Transport, storage and communication ✓ Finance, insurance, real estate and business services ✓ General government services	✓ Radio, TV, instruments, watches and clocks ✓ Electricity ✓ Water ✓ Wholesale and retail trade ✓ Catering and accommodation services ✓ Communication ✓ Finance and insurance ✓ Business services
Prospects limited by external trends and weak base ***LSRG leading (grow faster than district) and DG negative***	✓ Mining and quarrying	✓ Metals, metal products, machinery and equipment
Lagging Sectors		
High priority retention target and prospects limited by weak base and declining competitiveness ***LSRG lagging (grow slower than district) and DG positive***	✓ Agriculture, forestry and fishing ✓ Manufacturing ✓ Construction ✓ Community, social and personal services	✓ Food, beverages and tobacco ✓ Textiles, clothing and leather goods ✓ Wood, paper, publishing and printing ✓ Petroleum products, chemicals, rubber and plastic ✓ Transport and storage ✓ Community, social and personal services, other
Prospects limited by external trends and declining competitiveness and prospects limited overall ***LSRG lagging (grow slower than district) and DG negative***	✓	✓ Other non-metal mineral products ✓ Electrical machinery and apparatus ✓ Transport equipment ✓ Furniture and other manufacturing

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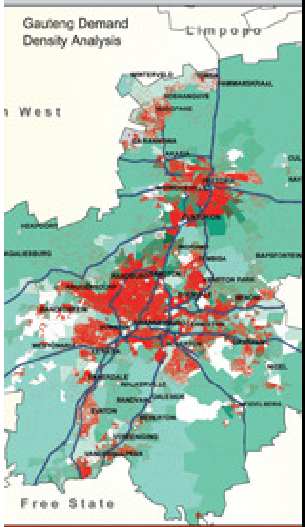

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MOGALE CITY INDUSTRIAL NODES

- **Boltonia**
- Chamdor
- Delporton
- Factoria
- Fariaville
- Muldersdrift
- Nooitgedacht

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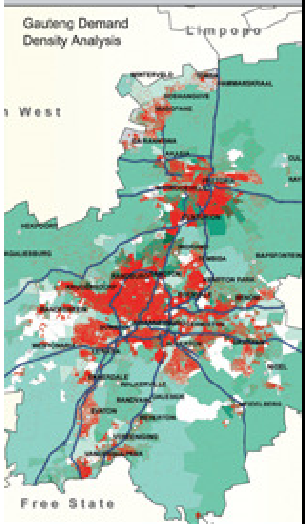

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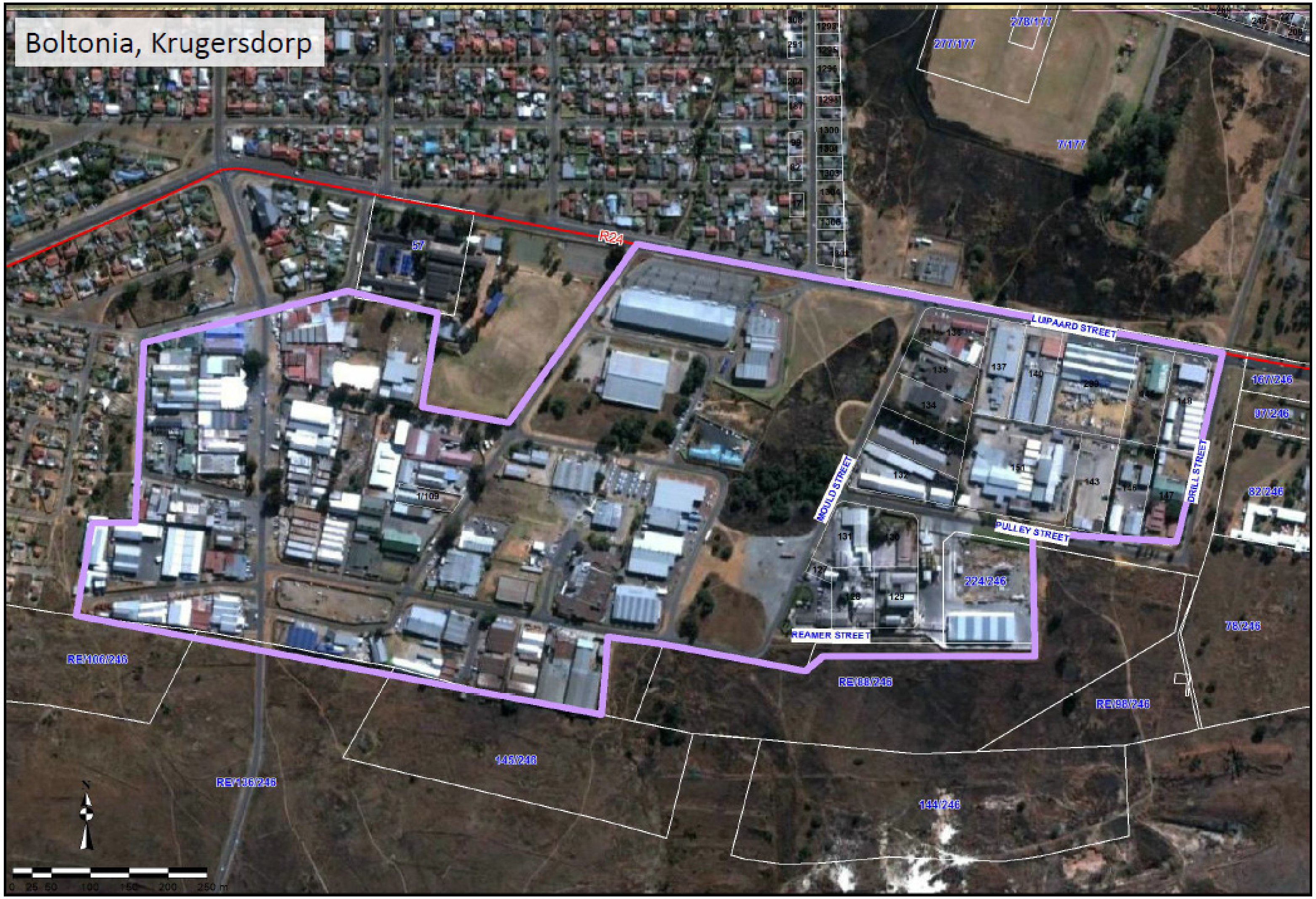
MOGALE CITY - BOLTONIA INDUSTRIAL NODE



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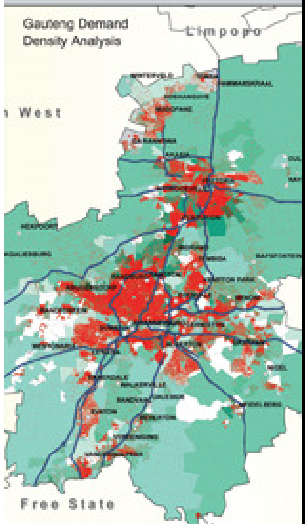

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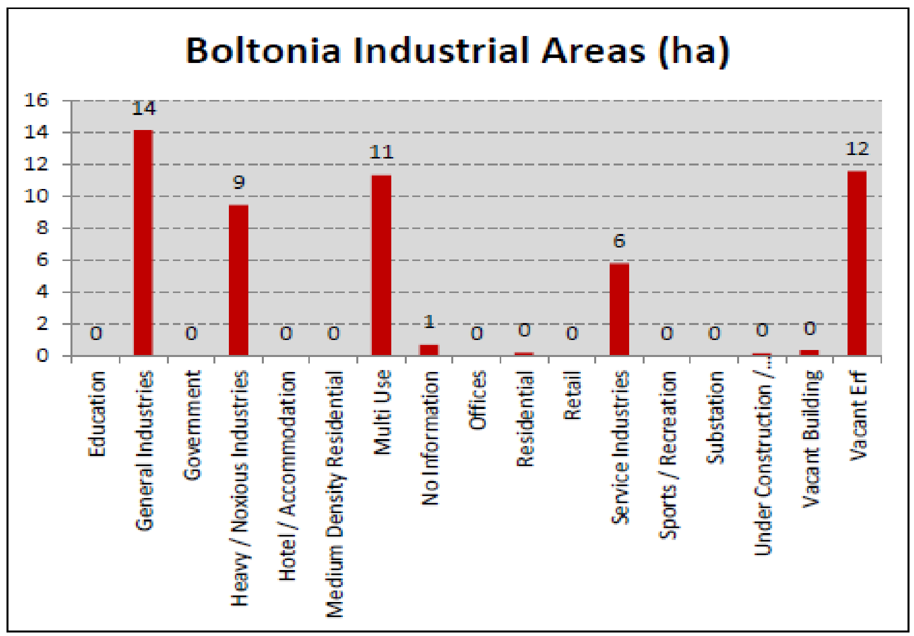
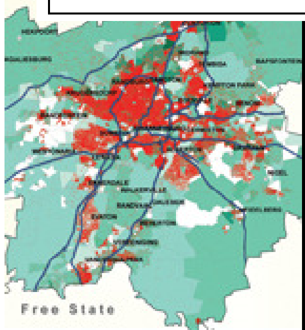
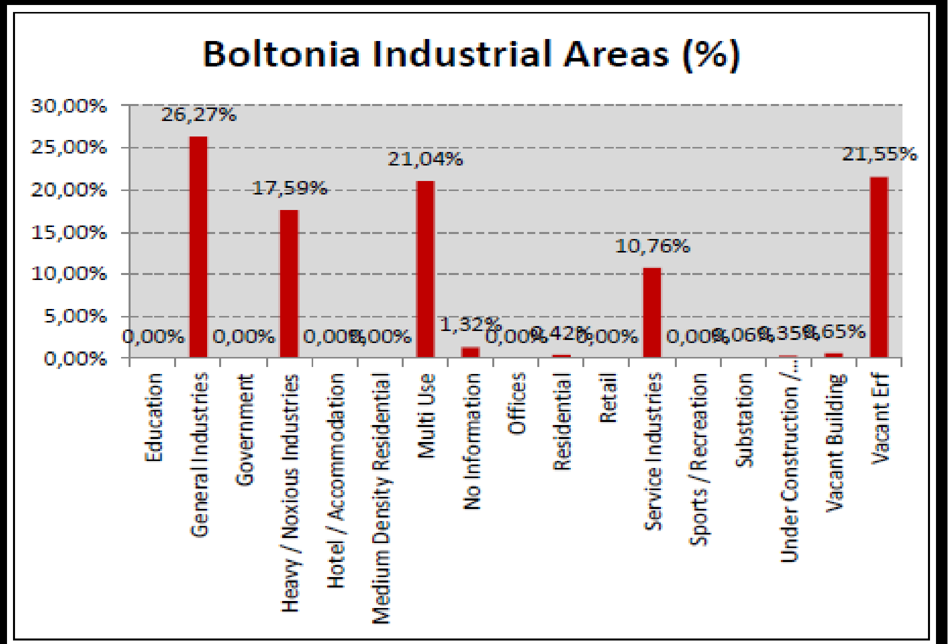


- Main industrial land use:
  - General industries (14ha / 26.3%)
  - Multi use (11ha / 21.0%)
  - Heavy / noxious industries (9ha / 17.6%)
  - Service industries (6ha / 10.8%)



- Boltonia Total Industrial Area: 54ha



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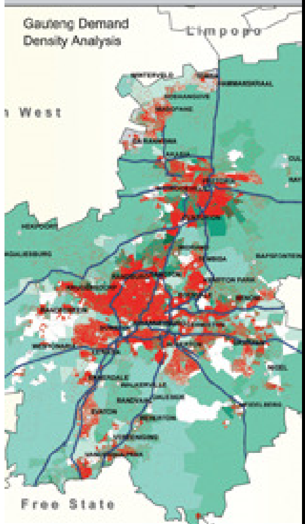

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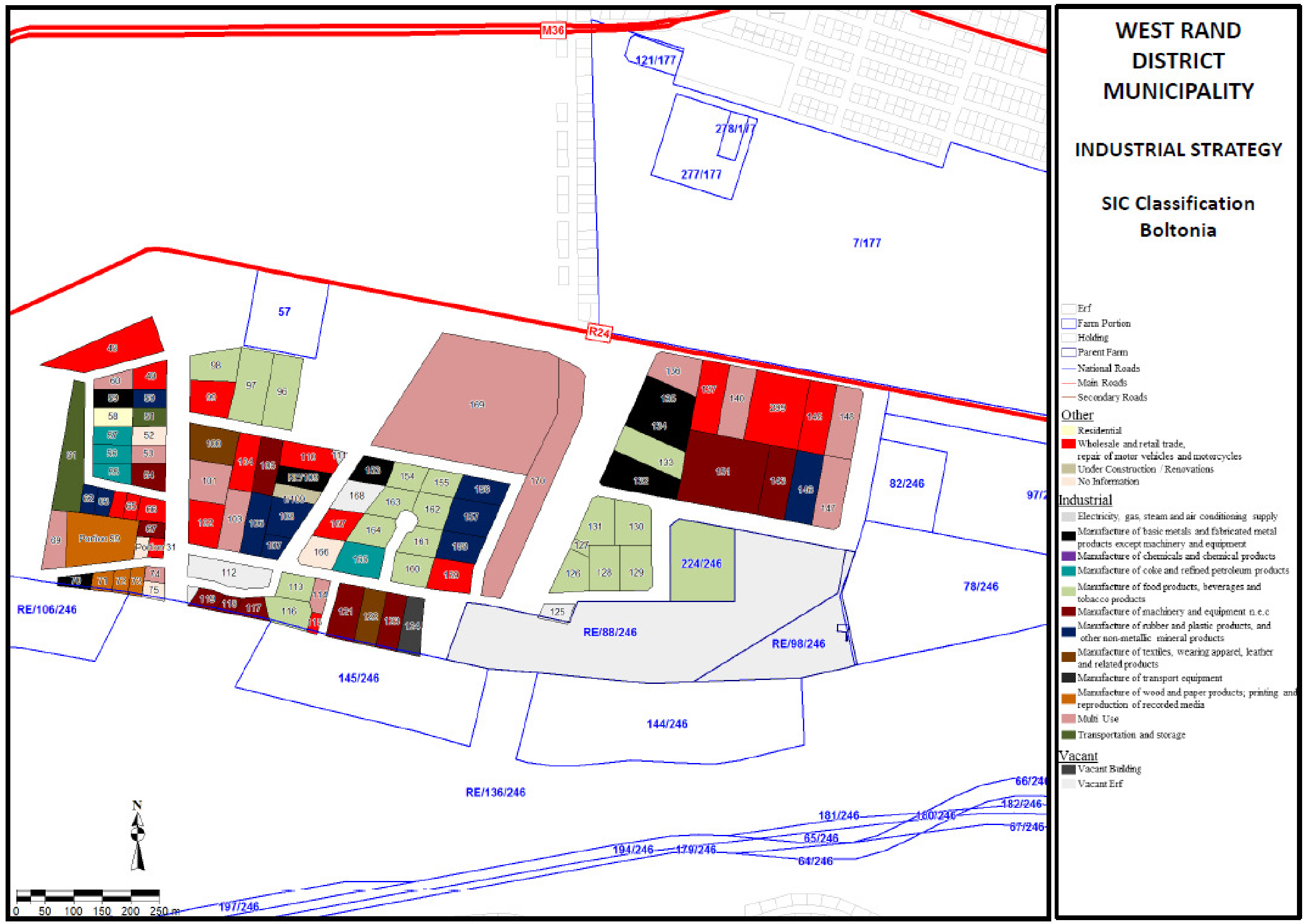

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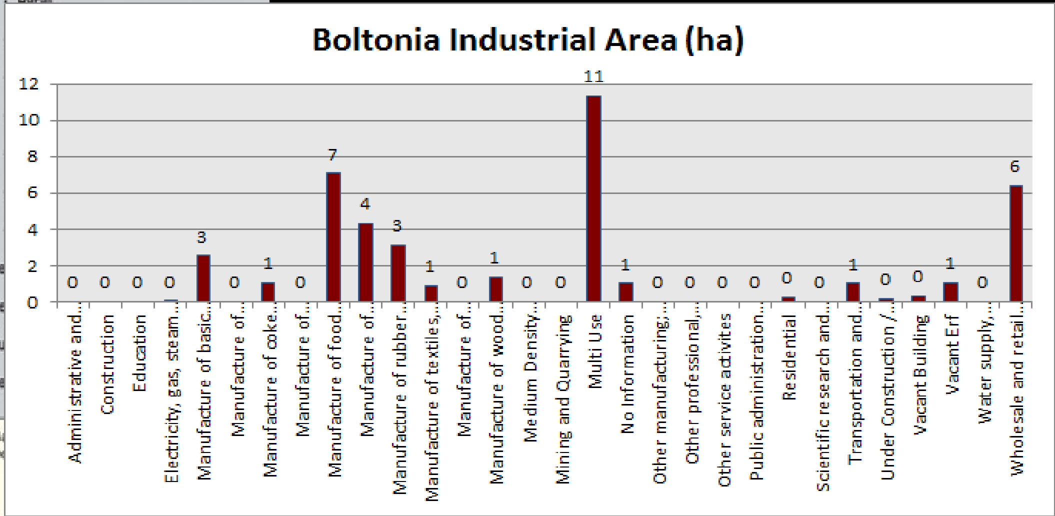
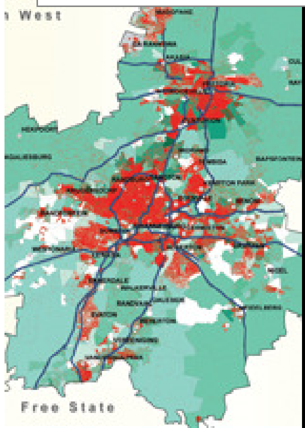
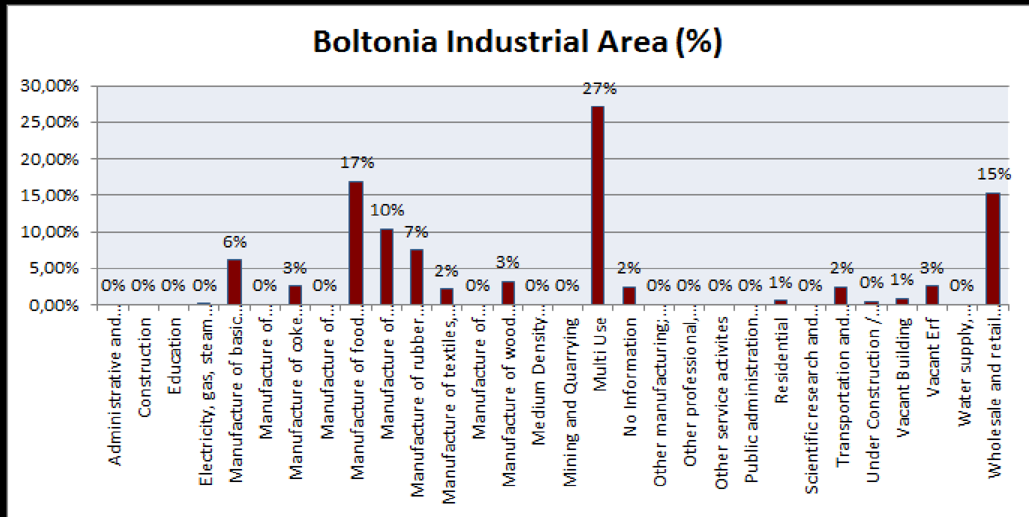
MOGALE CITY - BOLTONIA INDUSTRIAL NODE



- Main industrial activities:
  - Multi use (11ha / 27%)
  - Manufacture of food products, beverages and tobacco products (7ha / 17%)
  - Wholesale and retail trade, repair of motor vehicles and motorcycles (6ha / 15%)





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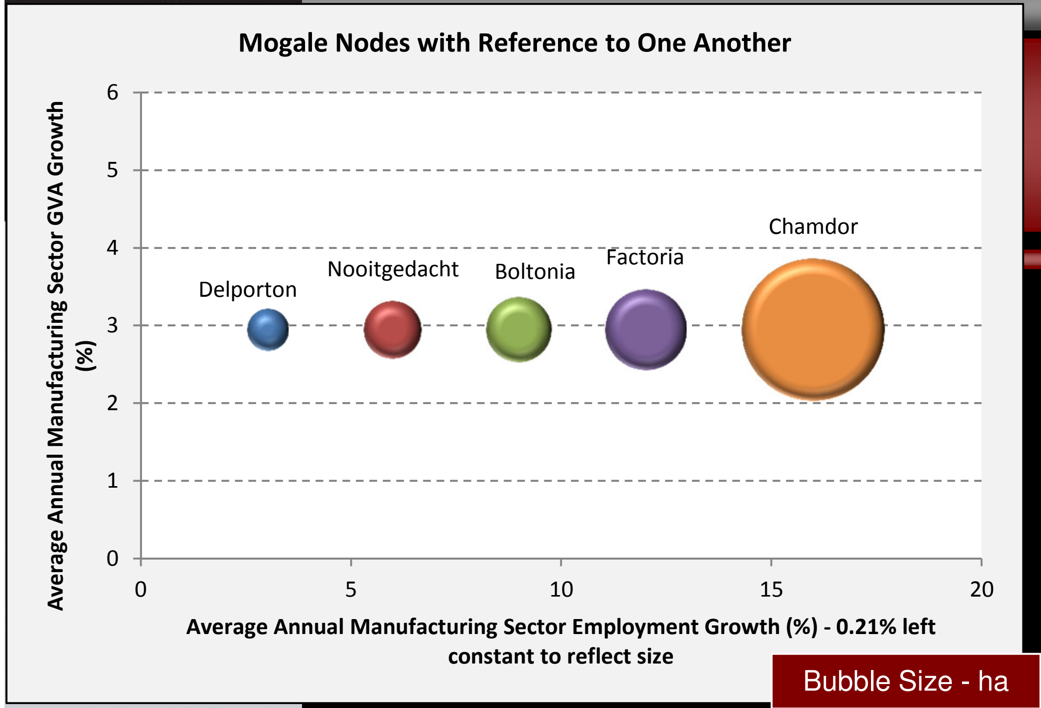
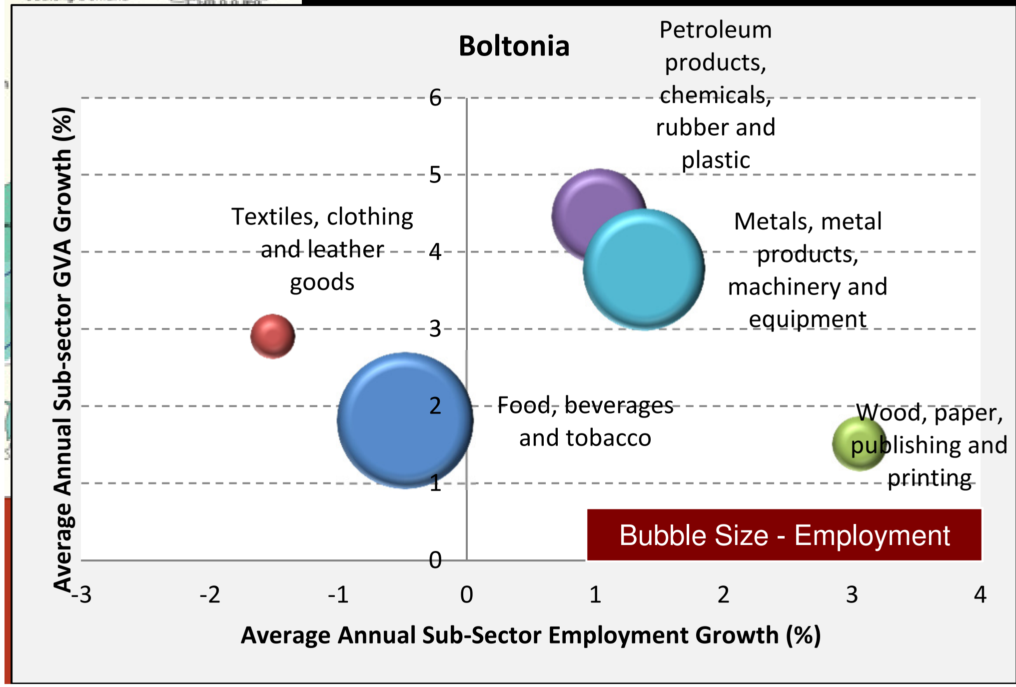
MOGALE CITY - BOLTONIA





- ❖ Seven industrial townships (of which one is vacant and one predominantly consist of land holdings)
- ❖ Boltonia third smallest
- ❖ 53.80 ha in extent
- ❖ Pure industrial concerns: 40.5%
- ❖ Development opportunity - Vacant erfs: 21.5% (11.6ha).

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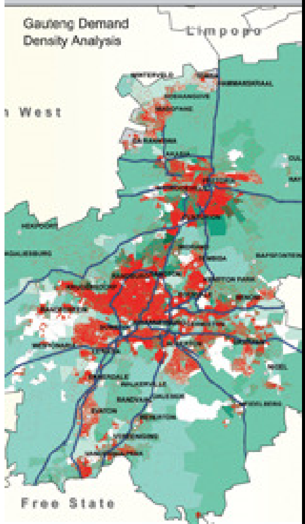

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MOGALE CITY - BOLTONIA INDUSTRIAL NODE

- Prominent type of industries:
  - General Industries
  - Multi-use
  - Heavy/Noxious Industries - fairly well distributed throughout the industrial area.

- Prominent activities:
  - Manufacture of food products, beverages, and tobacco products
  - Manufacture of rubber/plastics and other non-metallic mineral products
  - Manufacture of textiles, wearing apparel, leather and related products
  - Wholesale / auto repairs.

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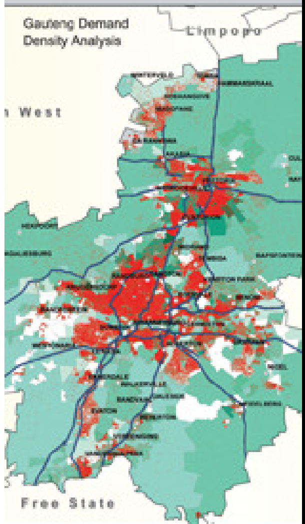

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MOGALE CITY - BOLTONIA INDUSTRIAL NODE

Strengths

- The industrial area has future expansion potential to the south.

- The industrial area is located along a major movement spine.

Weaknesses

- Apart from one large vacant site, the industrial area is fully developed.

Opportunities

- There are a number of vacant plots available still to be developed.

Threats

- The industrial area borders onto a residential development to the north and west.

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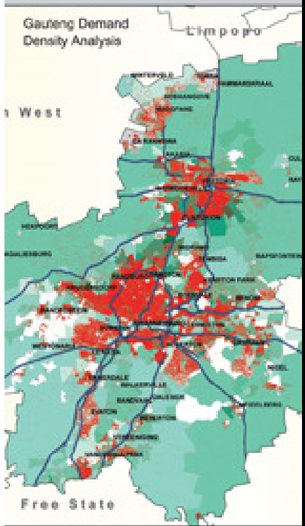

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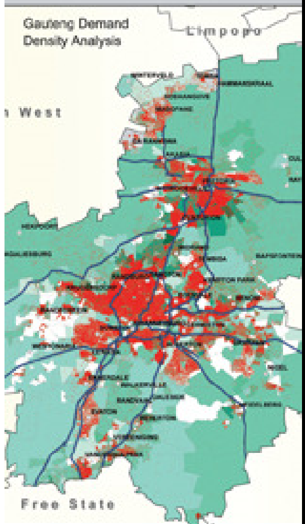

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MOGALE CITY - CHAMDOR INDUSTRIAL NODE

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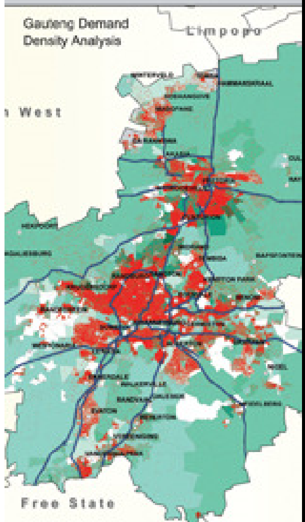

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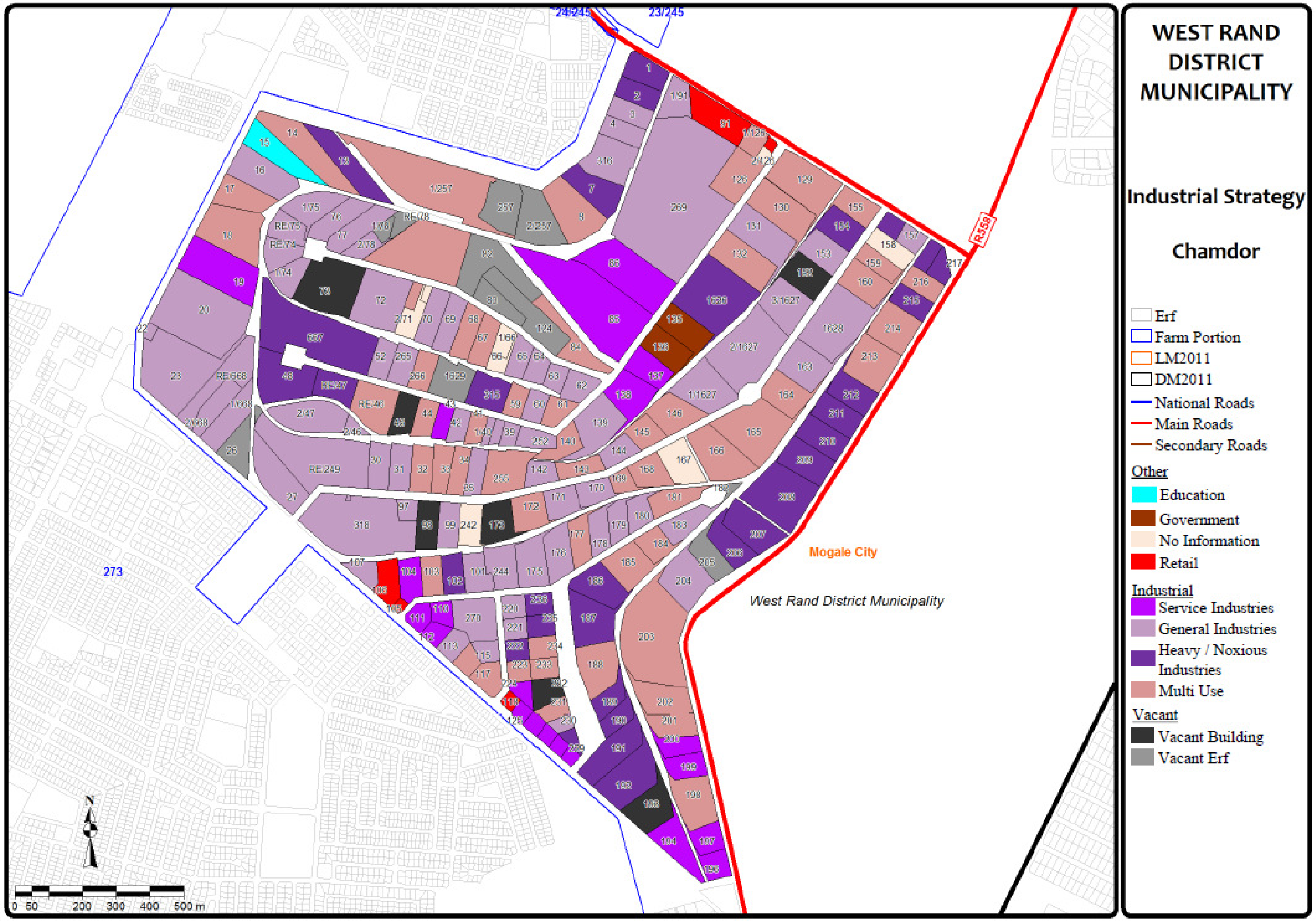

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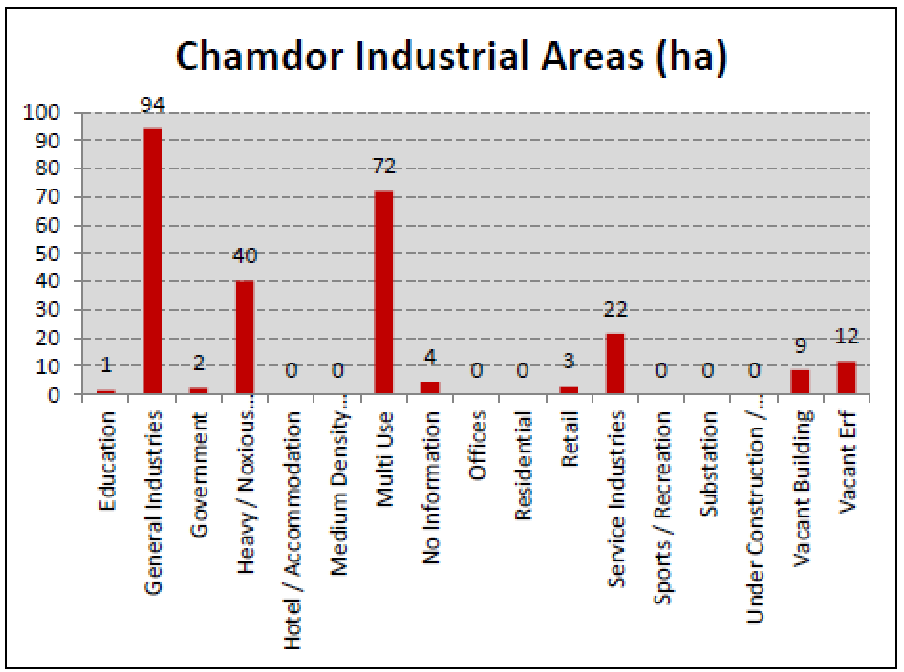
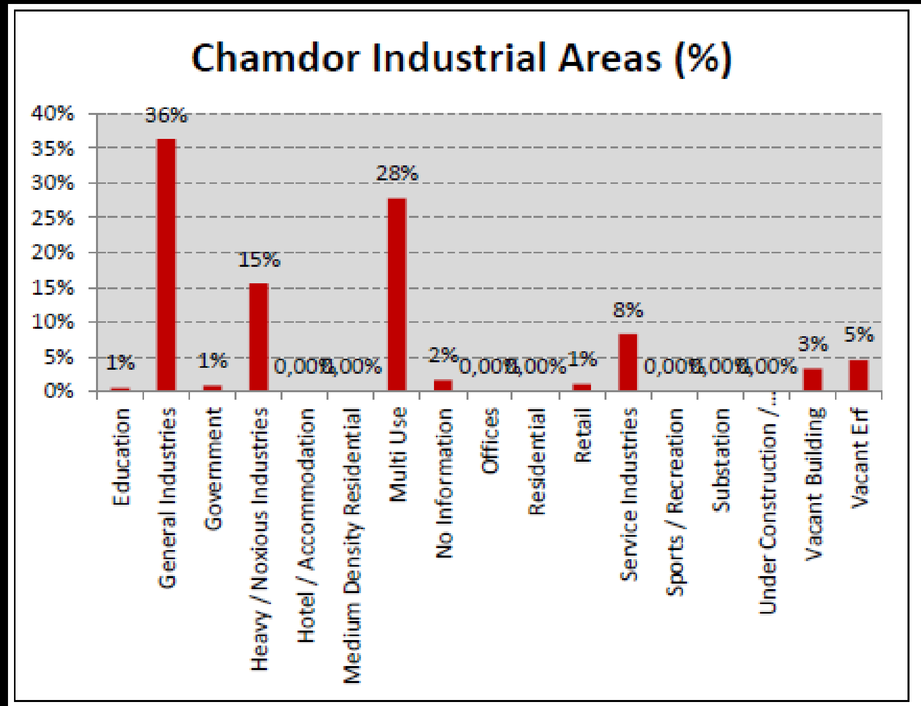
Real Estate Market Studies

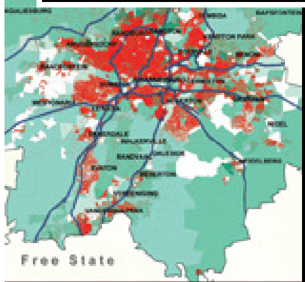
MOGALE CITY - CHAMDOR INDUSTRIAL NODE



- Main industrial land use:
  - General industries (49ha / 36%)
  - Multi use (72ha / 28%)
  - Heavy / noxious industries (40ha / 15%)
  - Service industries (22ha / 8%)



- Chamdor Total Industrial Area: 259ha



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DEMACON market studies

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  - Tourism / Shortstay accomodation
  - MICE activities
- Real Estate and Fiscal Impact Analysis
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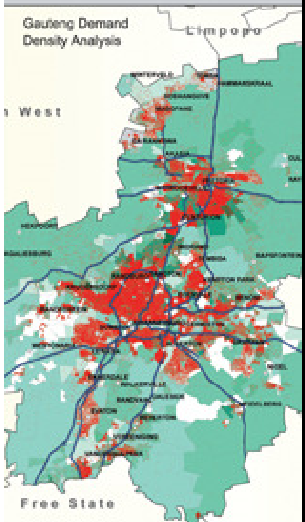
- Refurbishment & Remerchandising studies



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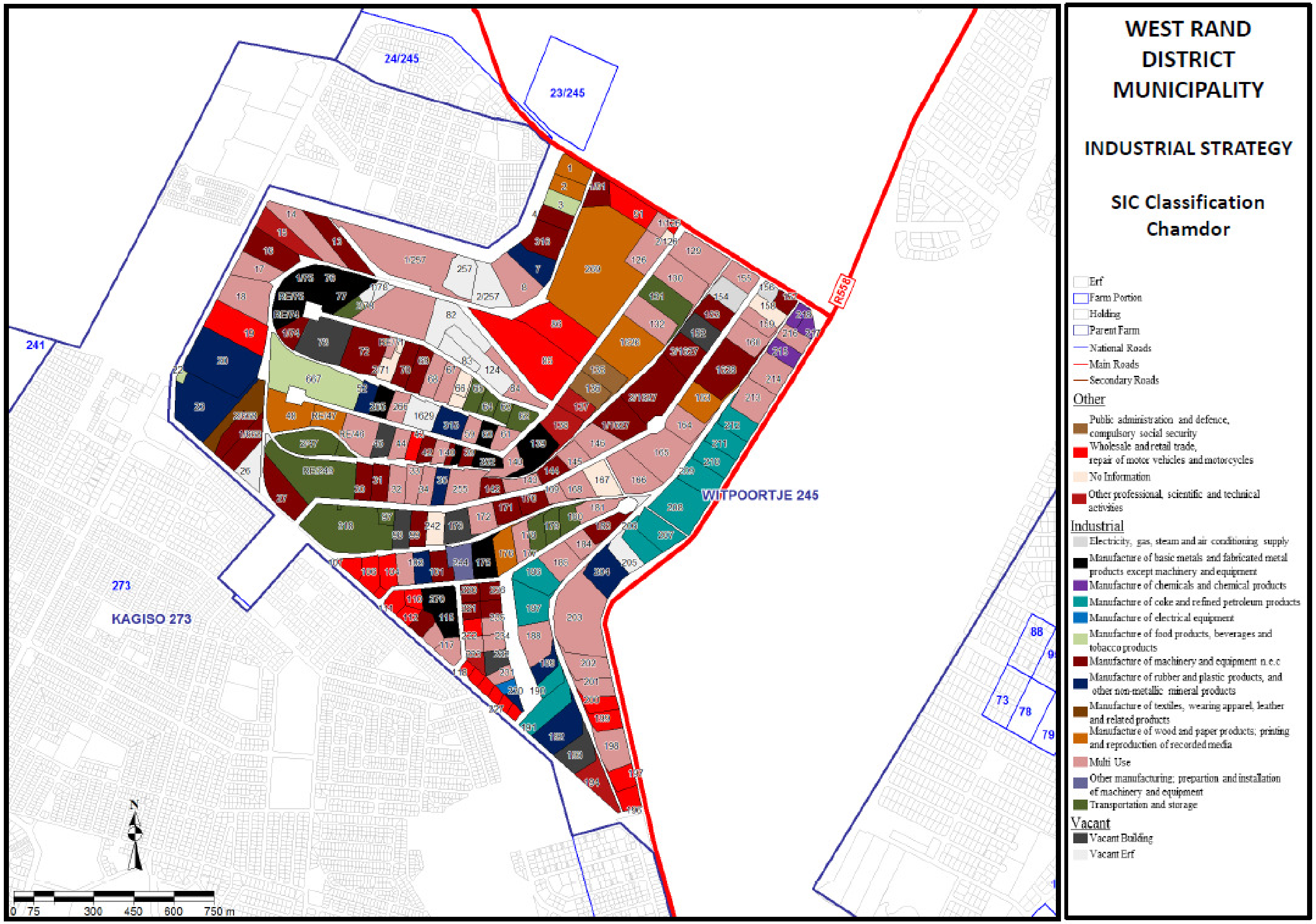

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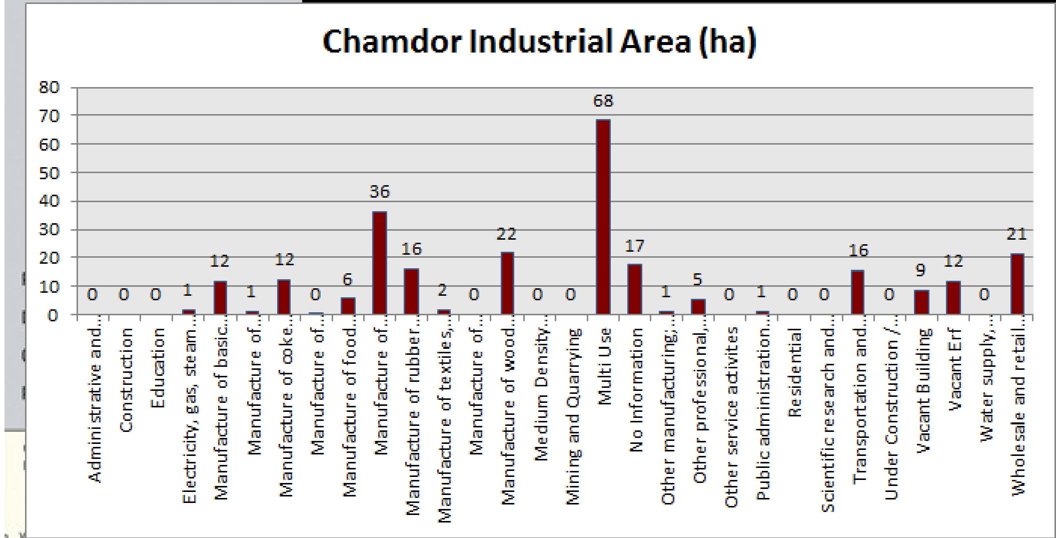
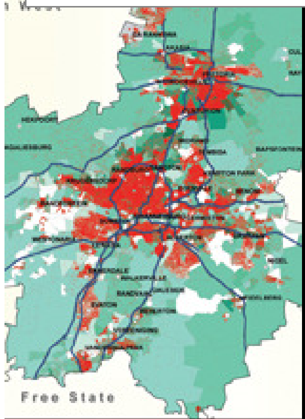
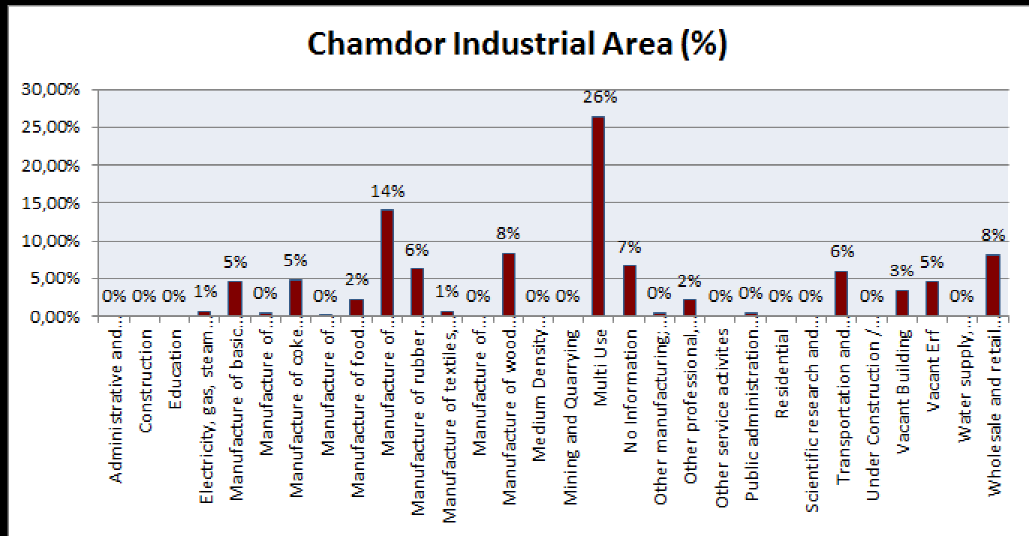
Real Estate Market Studies

MOGALE CITY - CHAMDOR INDUSTRIAL NODE



- Main industrial activities:
  - Multi use (68ha / 26%)
  - Manufacture of machinery and equipment n.e.c (36ha / 14%)
  - Manufacture of wood and paper products; printing and reproduction of recorded media (22ha / 8%)





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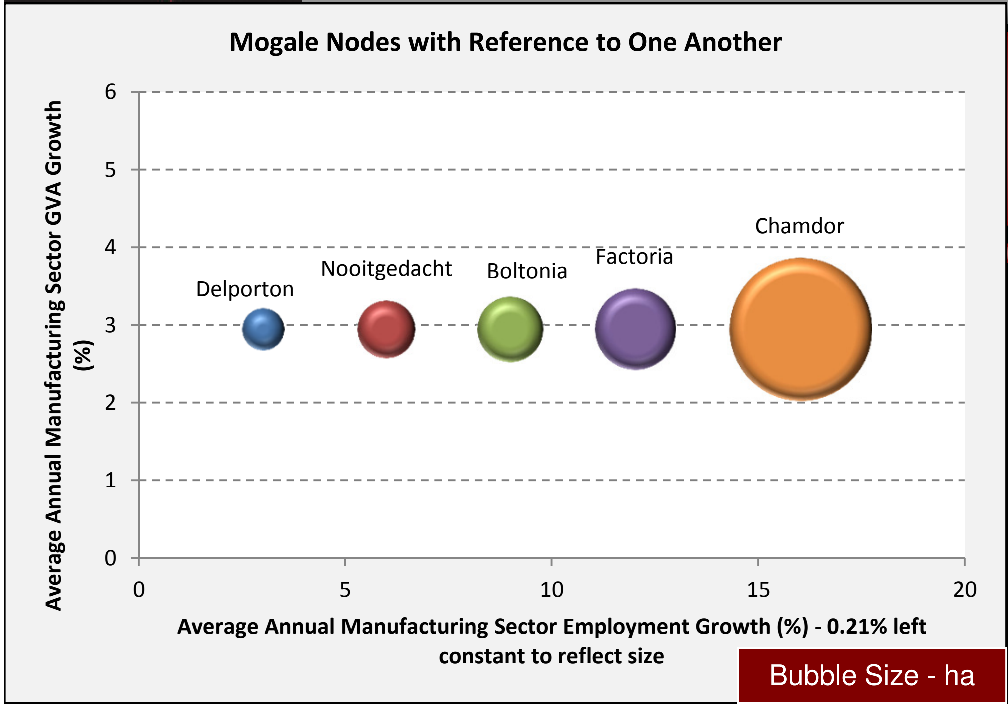
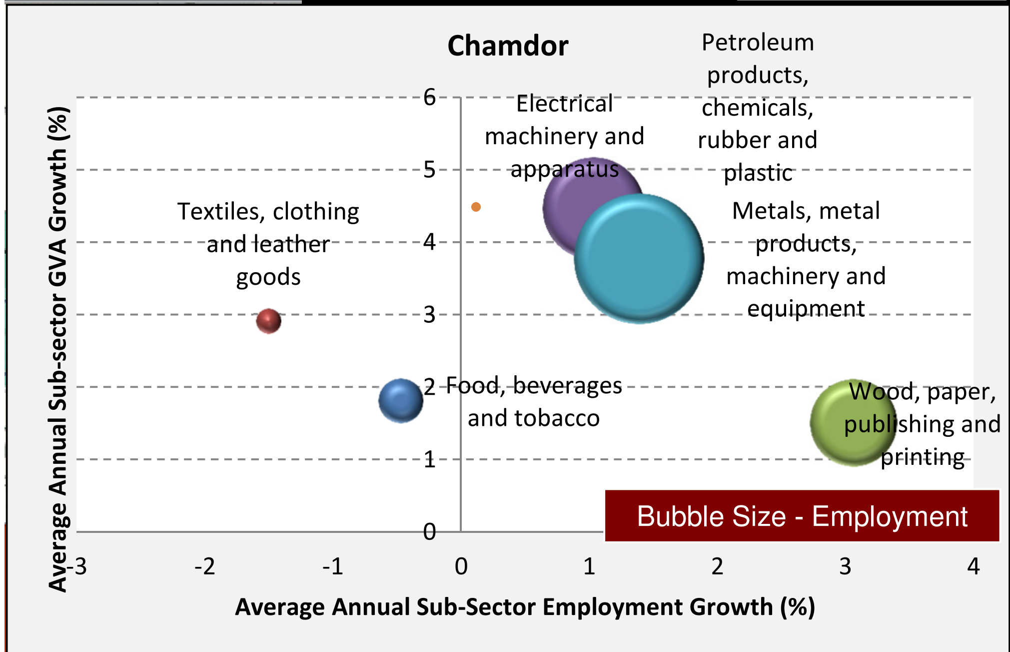
MOGALE CITY - CHAMDOR





- Chamdor is the largest node in Mogale (Fariaville is largest but vacant)
- 259.20ha in extent
- Pure industrial concerns: 41.3%
- Development opportunity - Vacant erfs: 4.6% (11.8ha).
- Note: 26.4% of land under multi-use.

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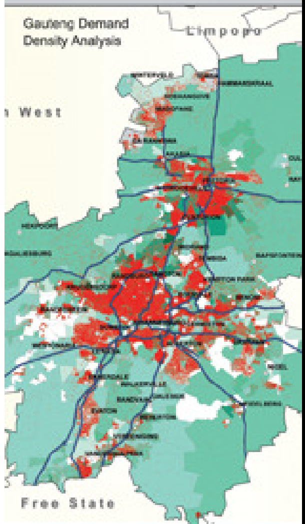

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MOGALE CITY - CHAMDOR INDUSTRIAL NODE

- Prominent type of industries:
  - General Industrial
  - Multi Use
  - Heavy/ Noxious Industries
  - Service Industries
  - There are very few non-industrial uses in this industrial area.
  - (Heavy industrial activities are mostly situated in the eastern and southern extents of the industrial area).

- Prominent activities:
  - Multi-use activities
  - Transport / Storage
  - Manufacture of coke and refined petroleum products
  - Manufacture of wood and paper products, printing and reproduction of recorded media.

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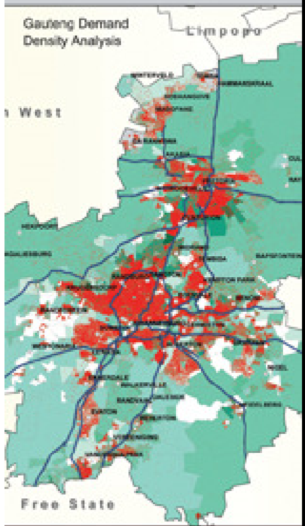

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MOGALE CITY - CHAMDOR INDUSTRIAL NODE

Strengths

- The industrial area is located along a major movement spine (R558).
- The industrial area is easily accessible.

Weaknesses

- Except for a few vacant erven and buildings, Chamdor is fully developed

Opportunities

- Area improvement
- Branding
- Security initiatives

Threats

- The industrial area borders onto a residential development to the north, west and south.
- Limited physical expansion potential.

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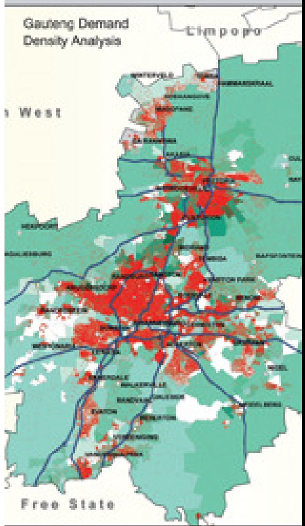

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MOGALE CITY INDUSTRIAL NODES

- Boltonia
- Chamdor
- **Delporton**
- Factoria
- Fariaville
- Muldersdrift
- Nooitgedacht

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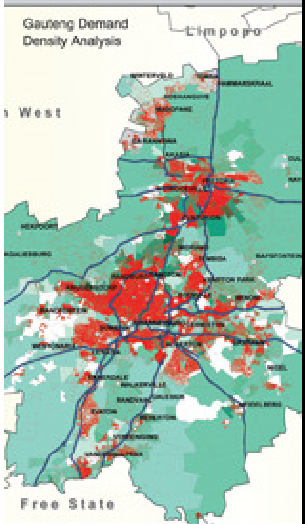

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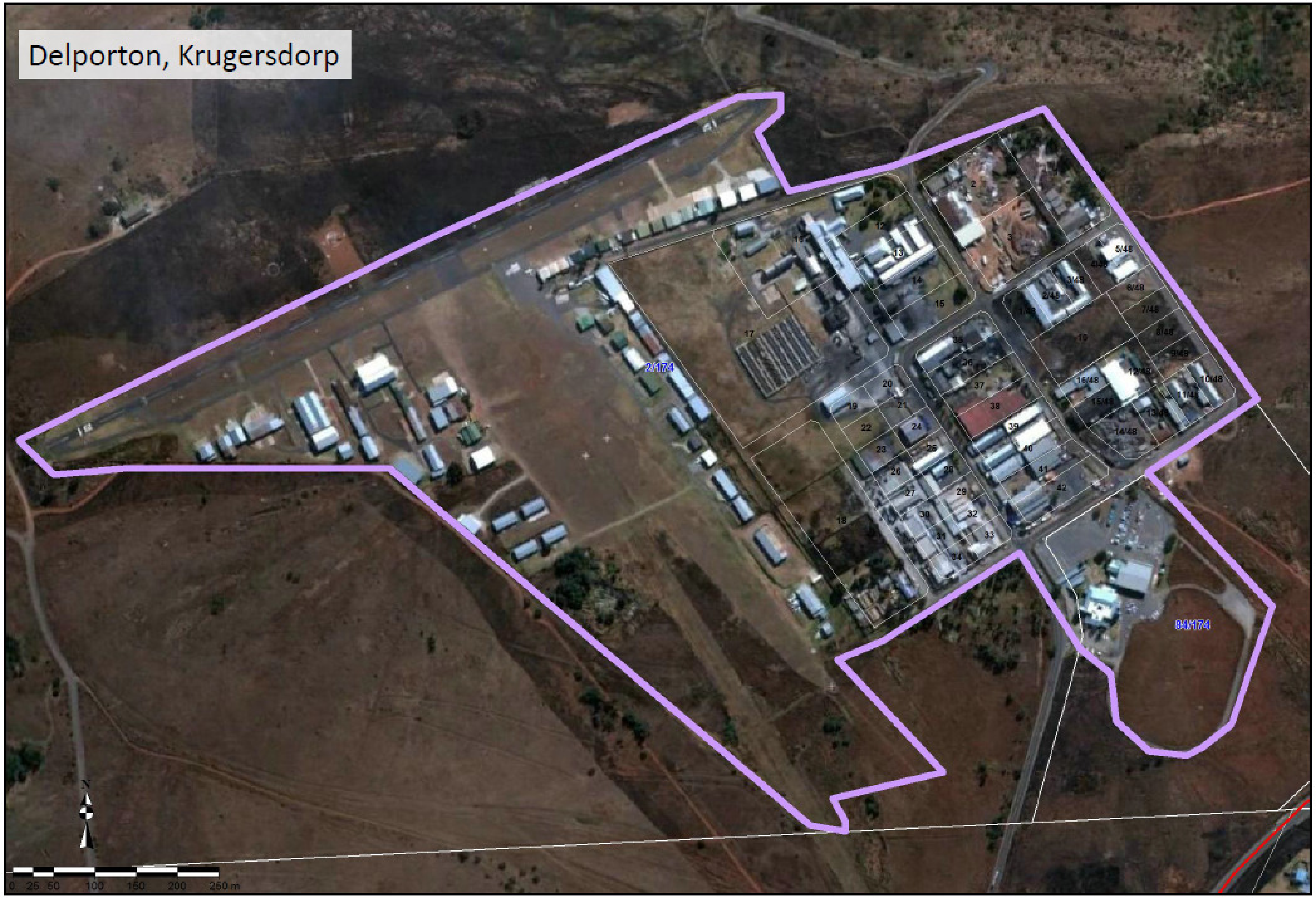
MOGALE CITY - DELPORTON INDUSTRIAL NODE



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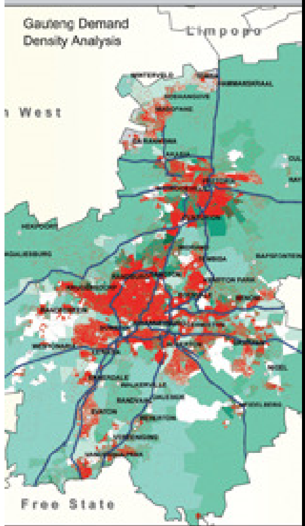

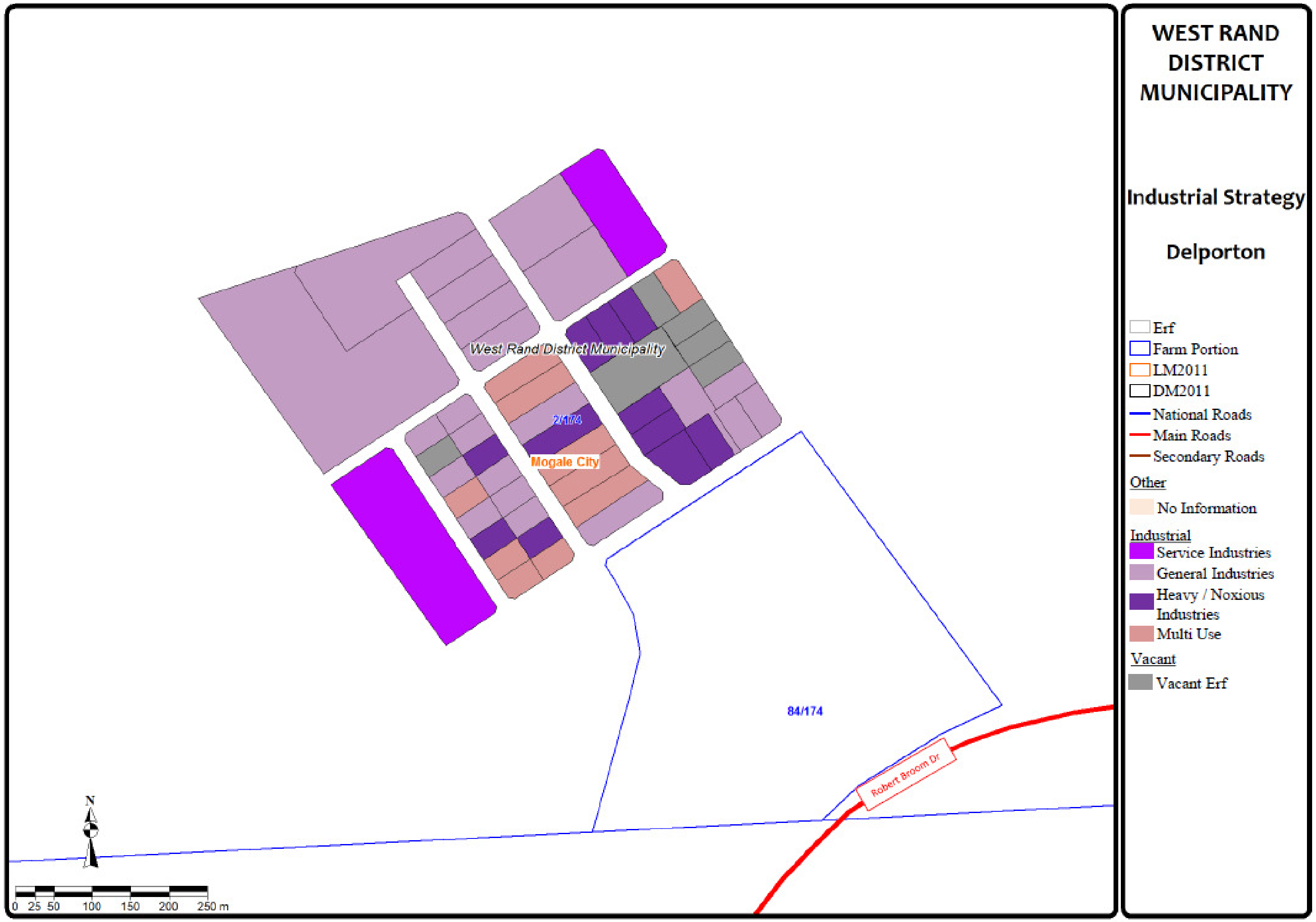

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Real Estate Market Studies

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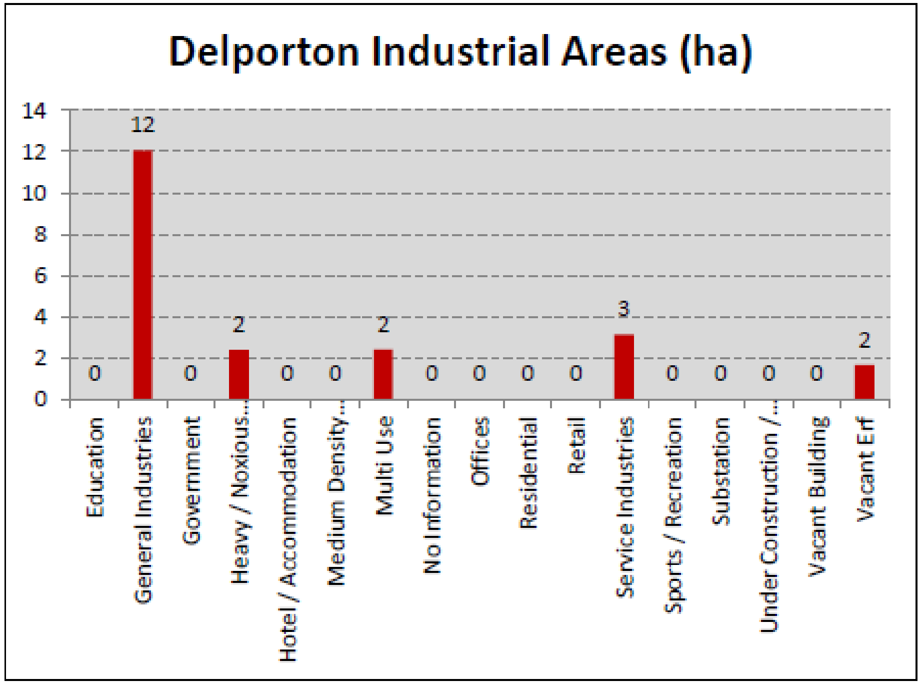
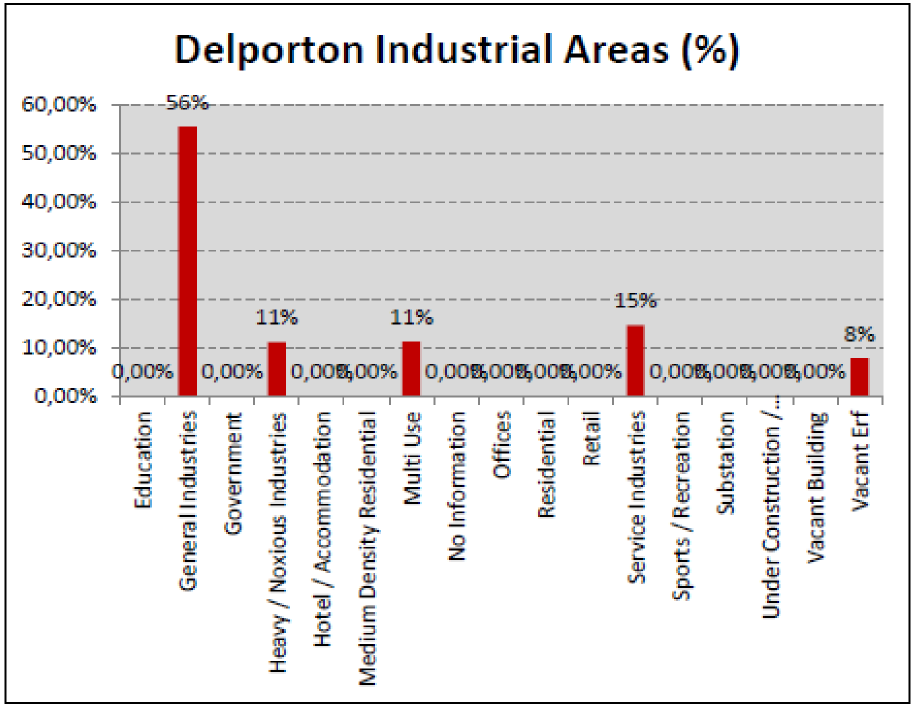
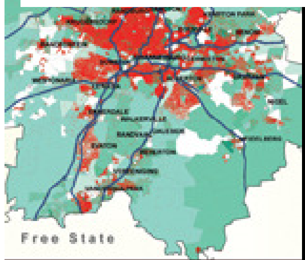


- Main industrial land use:
  - General industries (12ha / 56%)
  - Service industries (3ha / 15%)
  - Multi-use (2ha / 11%)
  - Heavy / noxious industries (2ha / 11%)





- Delporton Total Industrial Area: 22ha

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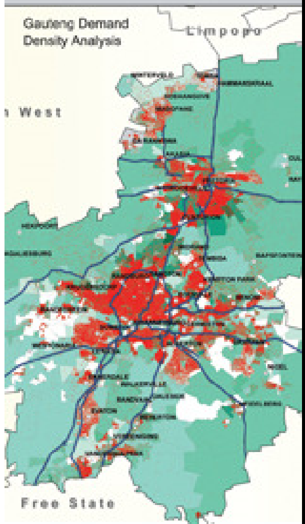

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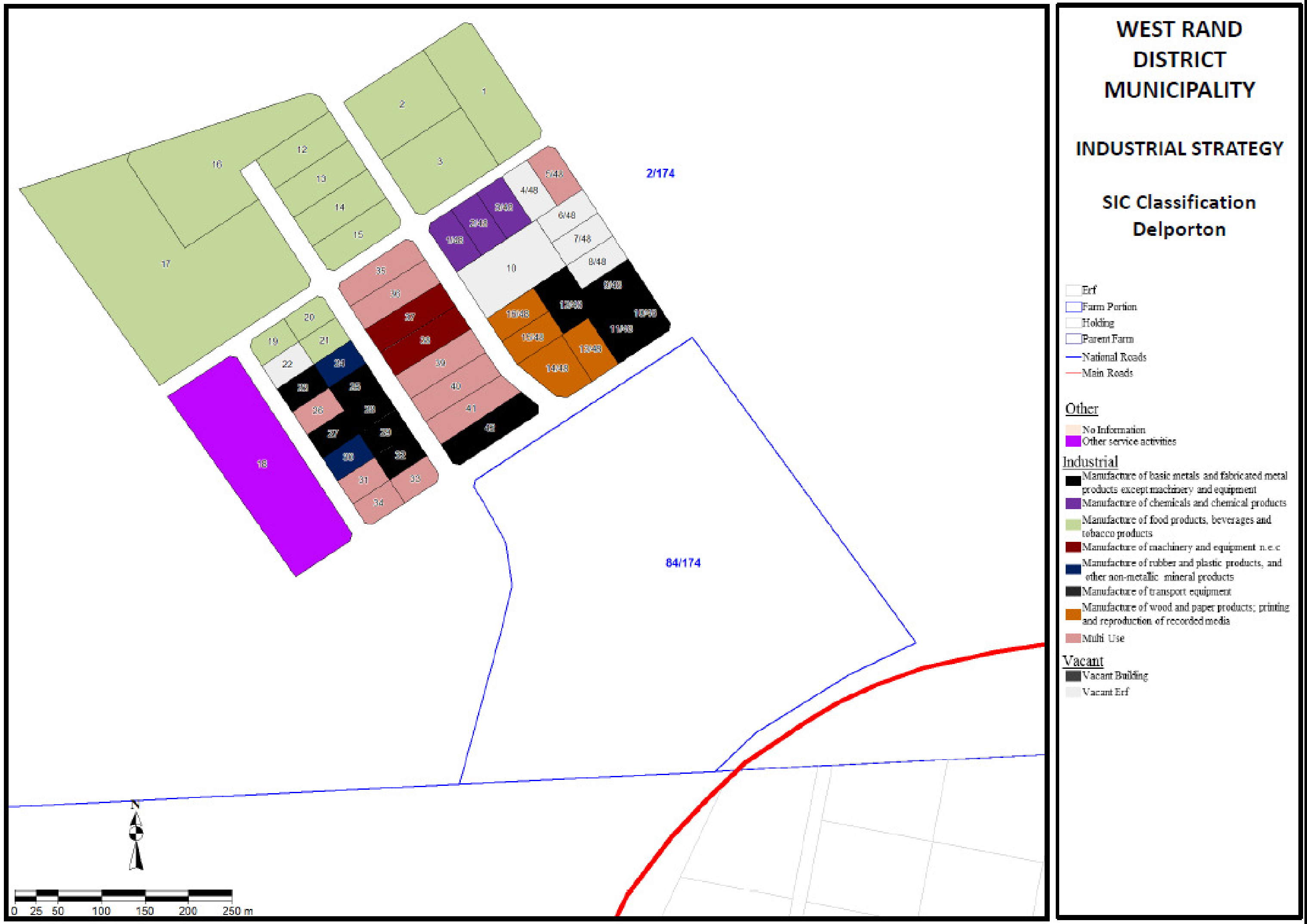

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Real Estate Market Studies

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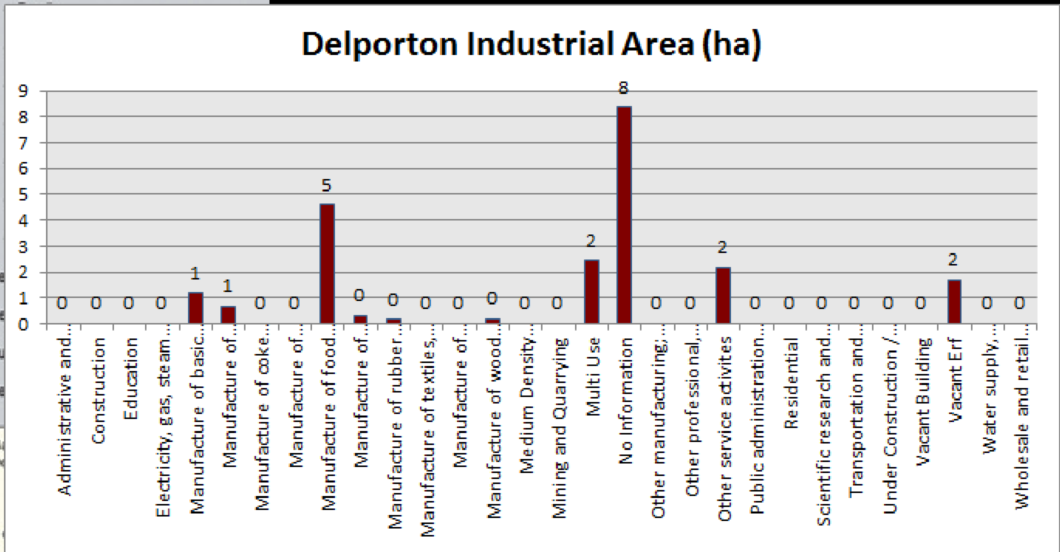
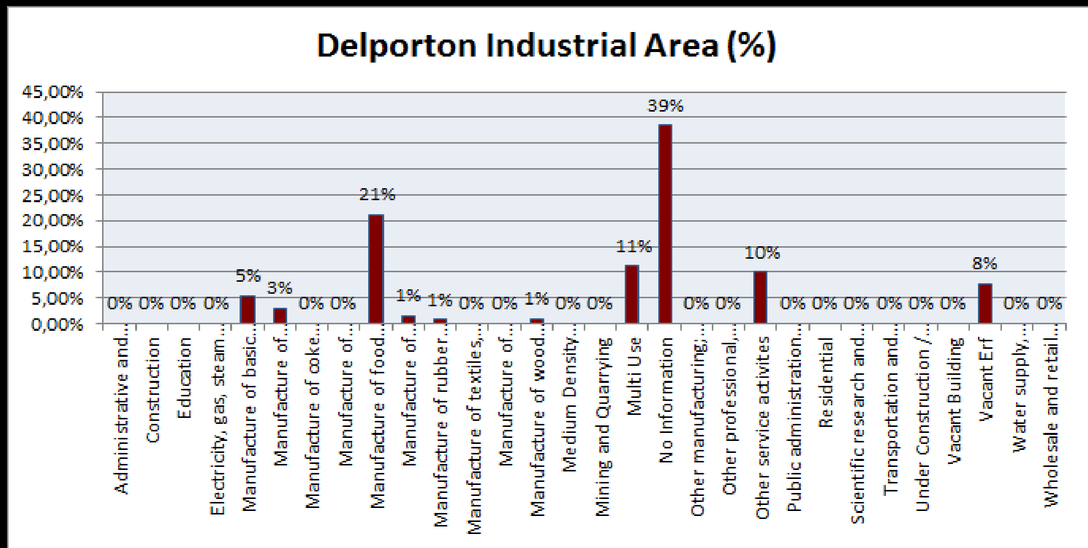
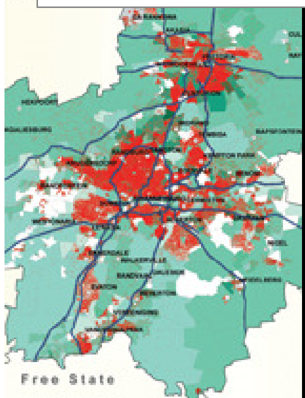


- Main industrial activities:
  - No information (8ha / 39%)
  - Manufacture of food products, beverages and tobacco products (5ha / 21%)
  - Multi use (2ha / 11%)
  - Other service activities (2ha / 11%)





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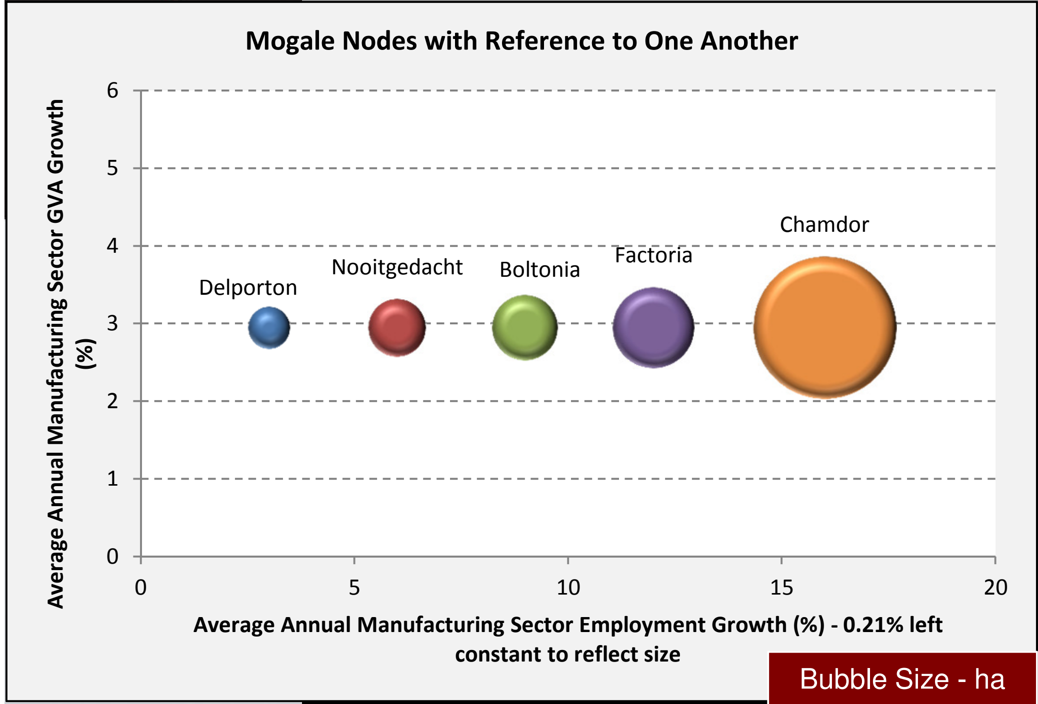
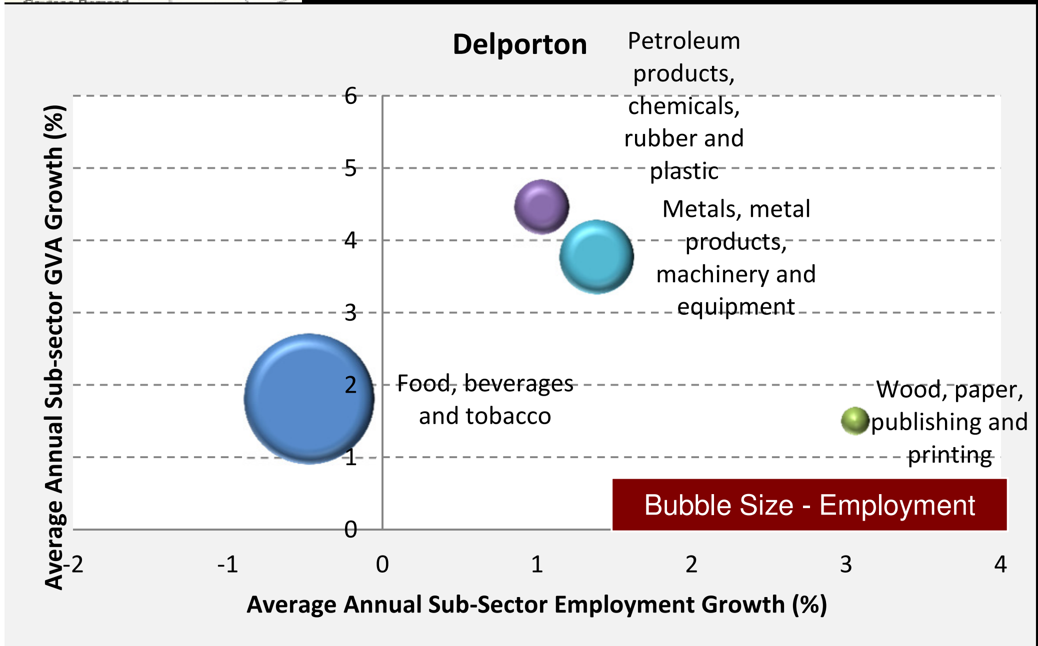
MOGALE CITY - DELPORTON





- ❖ Delporton is the smallest of the industrial nodes in Mogale
- ❖ 21.71 ha in extent
- ❖ Pure industrial concerns: 32.6%
- ❖ Development opportunity - Vacant erfs: 7.7% (1.67ha)
- ❖ Note: 38.4% of land use could not be identified.

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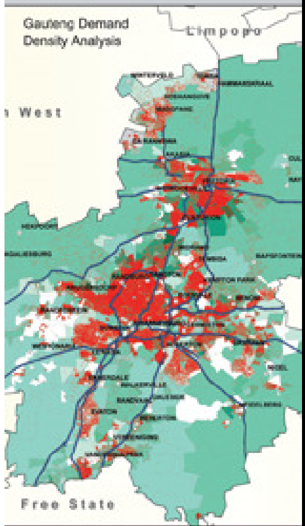

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MOGALE CITY - DELPORTON INDUSTRIAL NODE

- Prominent type of activities:
  - General Industries
  - Multi-use
  - The bulk of Heavy Industrial activity is situated towards the east of the study area.
  - The entire northern half of the industrial area is occupied by Gelita who manufactures gelatine

- Prominent activities:
  - Manufacturing of transport equipment
  - Manufacturers of wood and paper products, printing and reproduction of recorded media
  - Manufacturing of food products, beverages and tobacco products
  - Erf 18 in the south-west is occupied by the SPCA.

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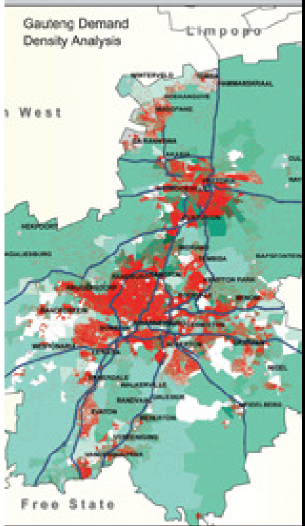

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MOGALE CITY - DELPORTON INDUSTRIAL NODE

Strengths

- The industrial area is easily accessible.

- The industrial area borders on the Krugersdorp Earodome.

Weaknesses

- Delporton is fully developed, except for six vacant erven – five of which are situated in the eastern part of the industrial area.

- Geographically isolated

- Limited sight value & exposure

Opportunities

- Smaller industrial area – potentially more niche, clean industries / businesses

- Improve image & brand

Threats

- The industrial area borders the Blougat Nature Conservation area to the East, which may influence future expansion potential.

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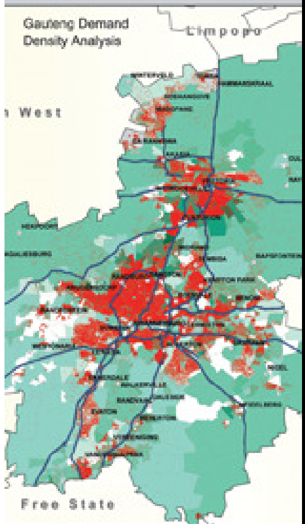

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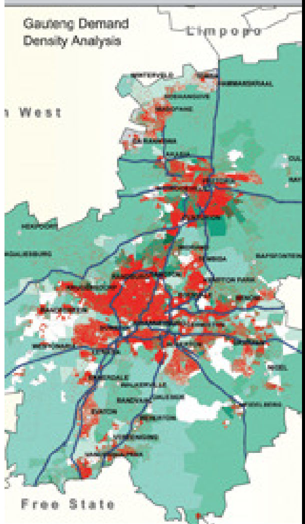

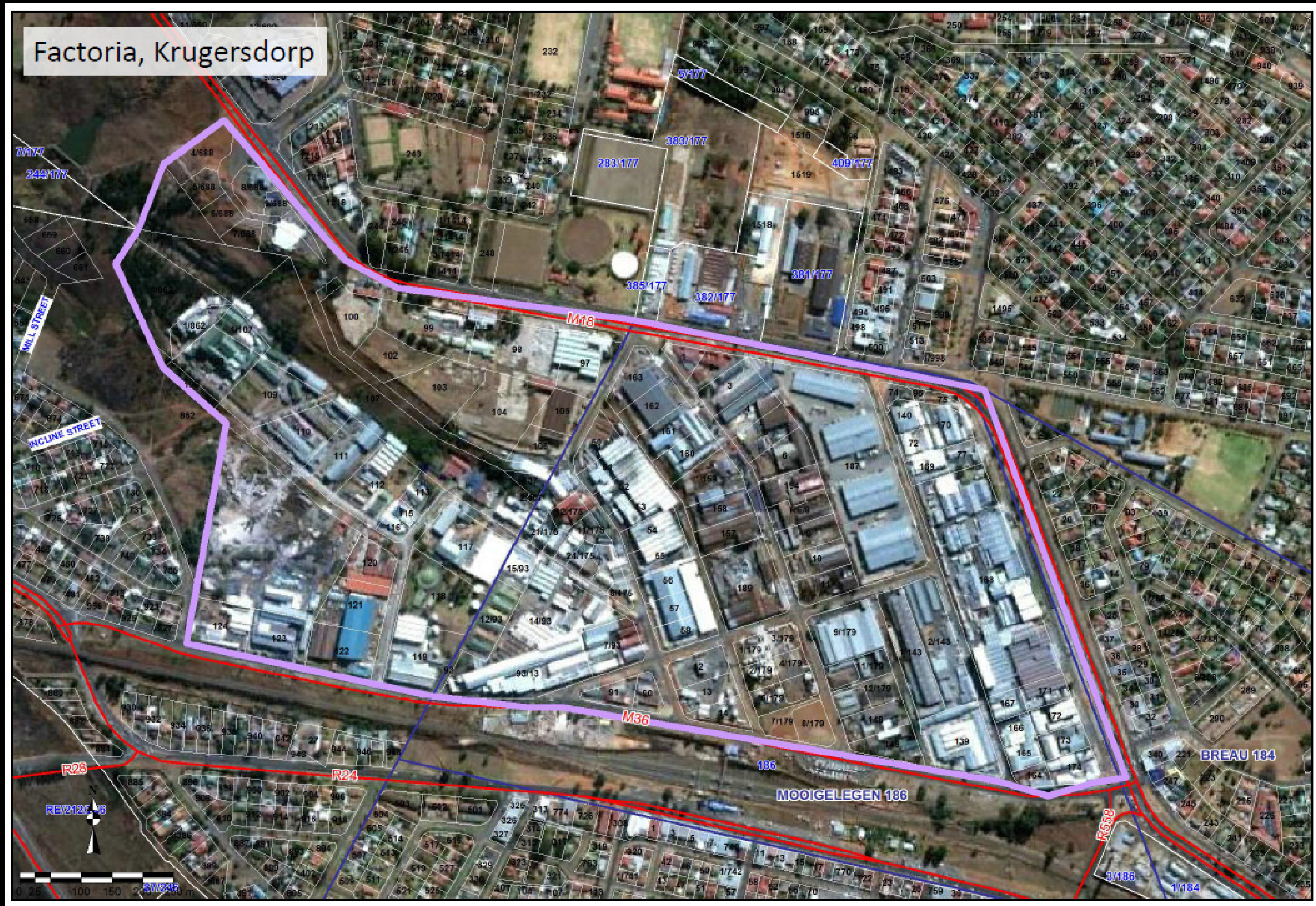

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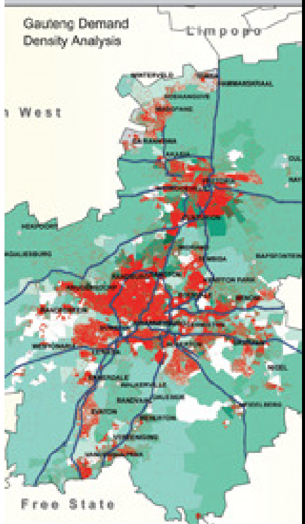

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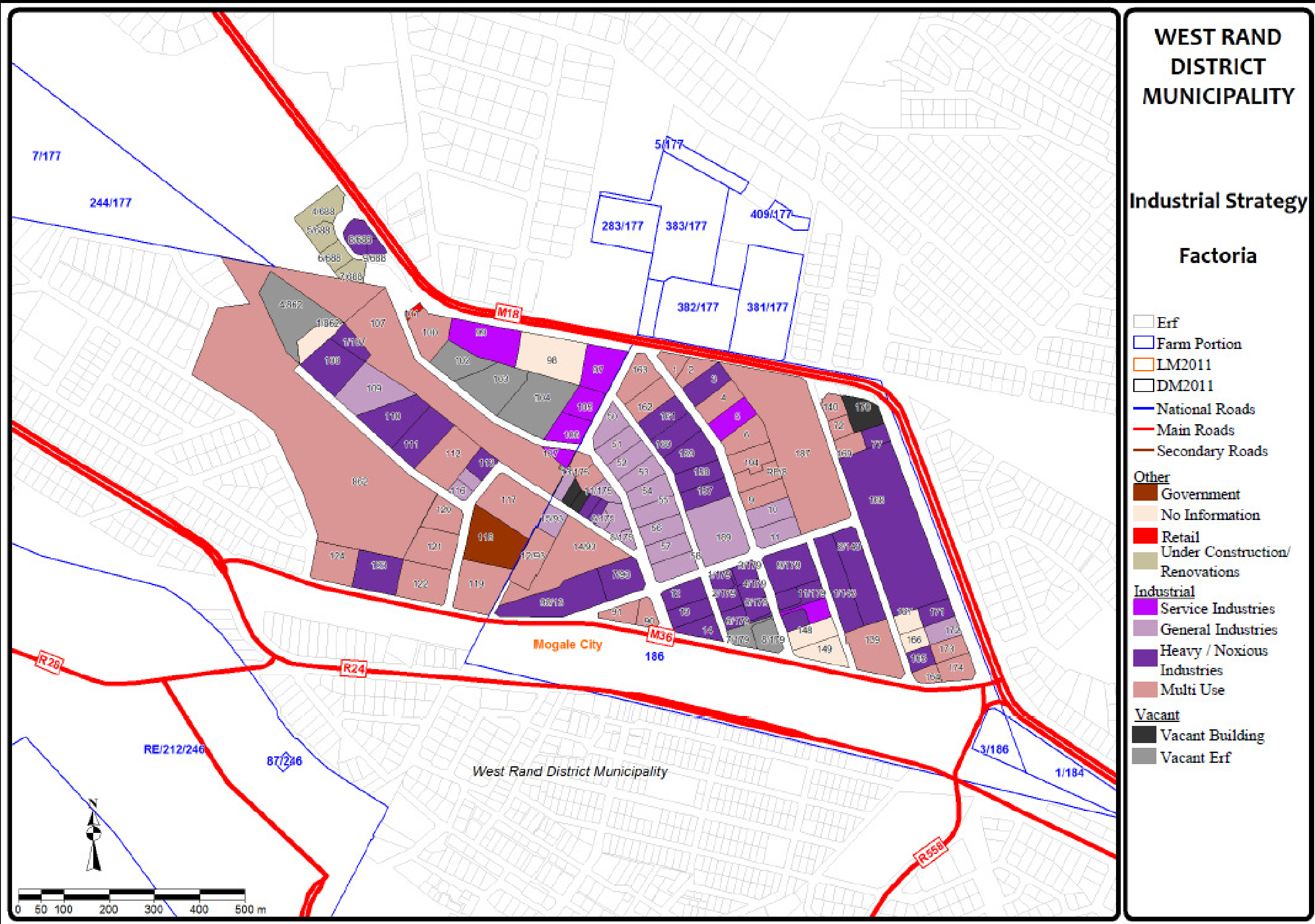

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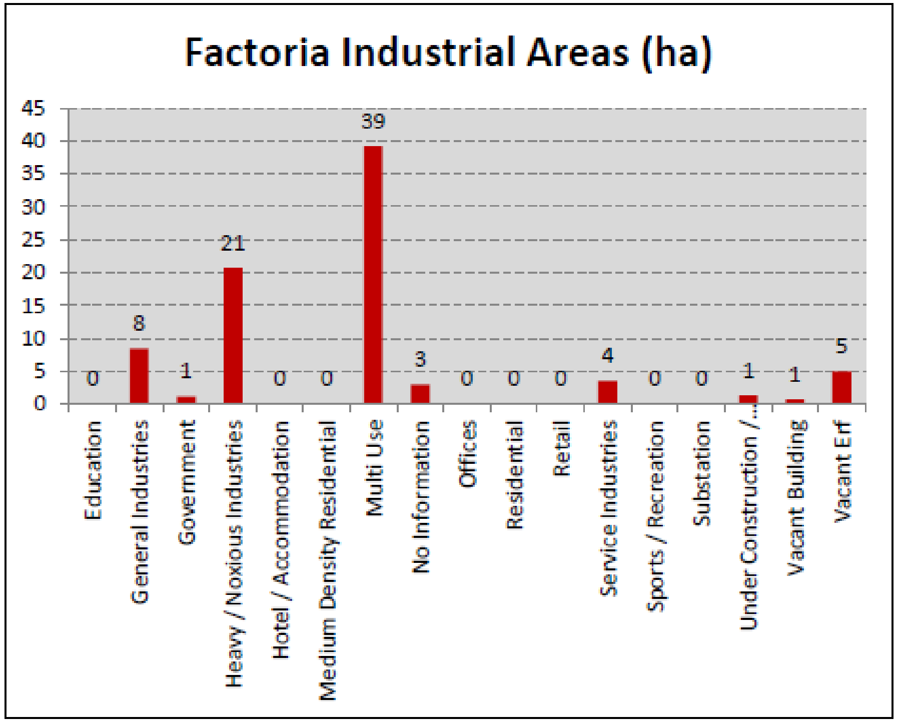
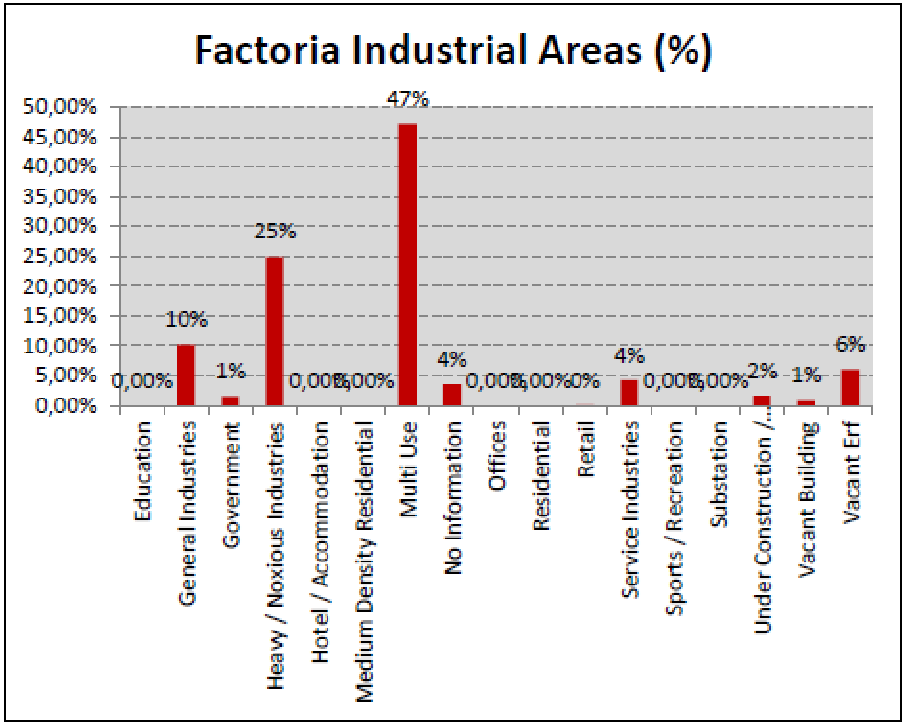


- Main industrial land uses:
  - Multi use (39ha / 47%)
  - Heavy / noxious industries (21ha / 25%)
  - General industries (8ha / 10%)
  - Service industries (4ha / 4%)

- Factoria Total Industrial Area: 83ha



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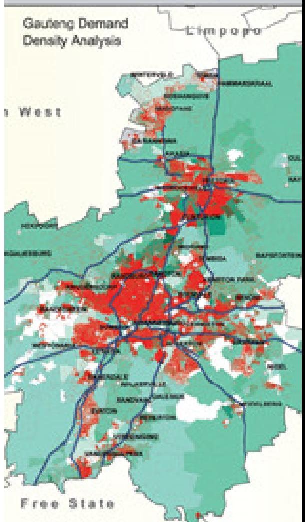

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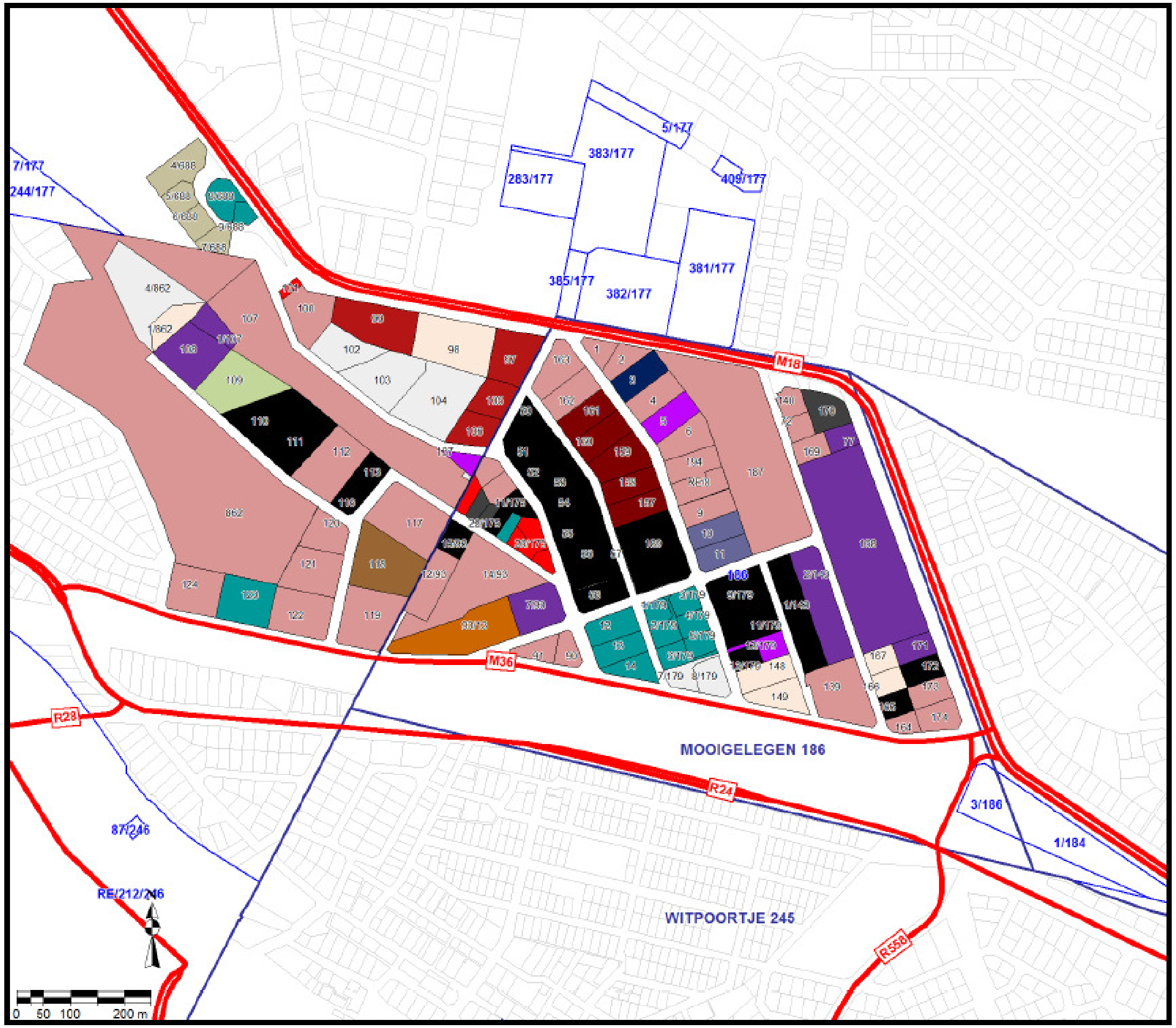

WEST RAND DISTRICT MUNICIPALITY

INDUSTRIAL STRATEGY

SIC Classification Factoria

- Erf
- Farm Portion
- Holding
- Parent Farm
- National Roads
- Main Roads
- Secondary Roads

Other
- Public administration and defence, compulsory social security
- Wholesale and retail trade, repair of motor vehicles and motorcycles
- Other professional, scientific and technical activities
- Other service activities
- No Information
- Under Construction / Renovations

Industrial
- Manufacture of basic metals and fabricated metal products except machinery and equipment
- Manufacture of chemicals and chemical products
- Manufacture of coke and refined petroleum products
- Manufacture of food products, beverages and tobacco products
- Manufacture of machinery and equipment n.e.c
- Manufacture of rubber and plastic products, and other non-metallic mineral products
- Manufacture of wood and paper products; printing and reproduction of recorded media
- Other manufacturing; prepartion and installation of machinery and equipment
- Multi Use

Vacant
- Vacant Building
- Vacant Erf

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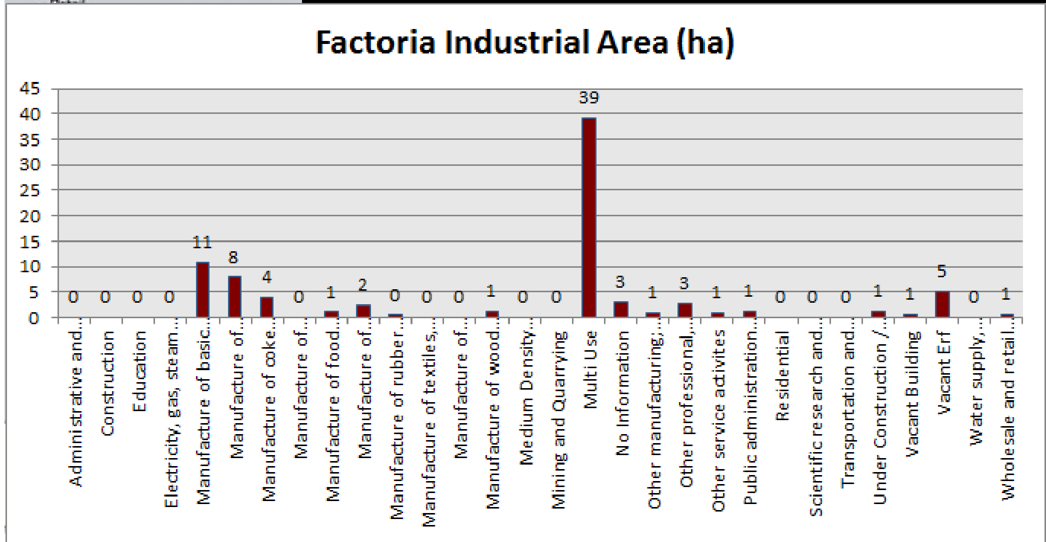
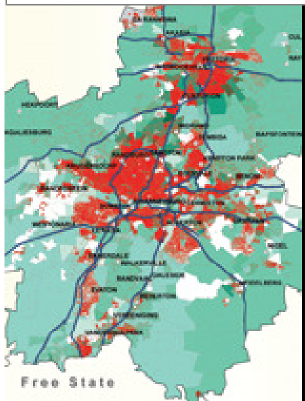
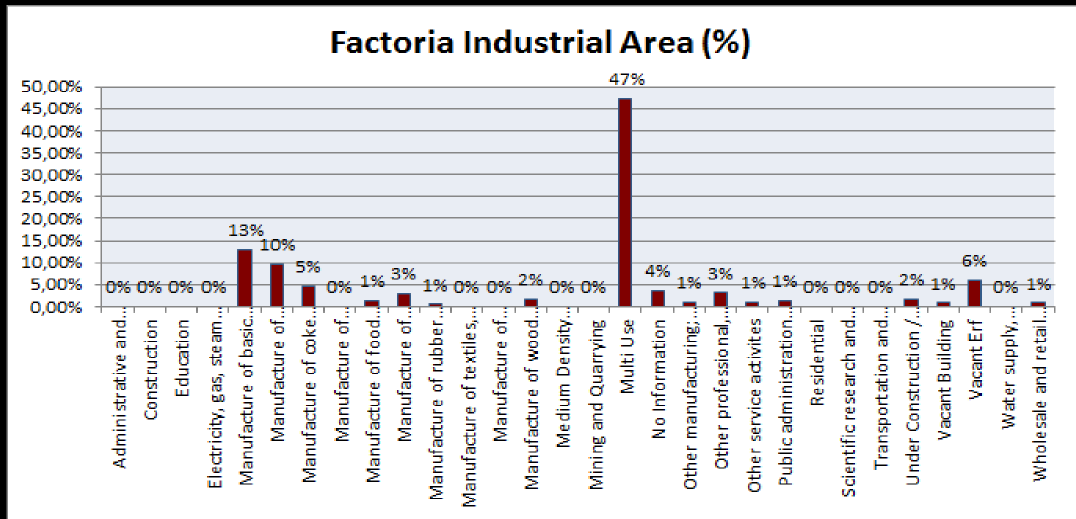
Real Estate Market Studies

MOGALE CITY - FACTORIA INDUSTRIAL NODE



- Main industrial activities:
  - Multi use (39ha / 47%)
  - Manufacture of basic metals and fabricated metal products except machinery and equipment (11ha / 13%)
  - Manufacture of chemicals and chemical products (8ha / 10%)





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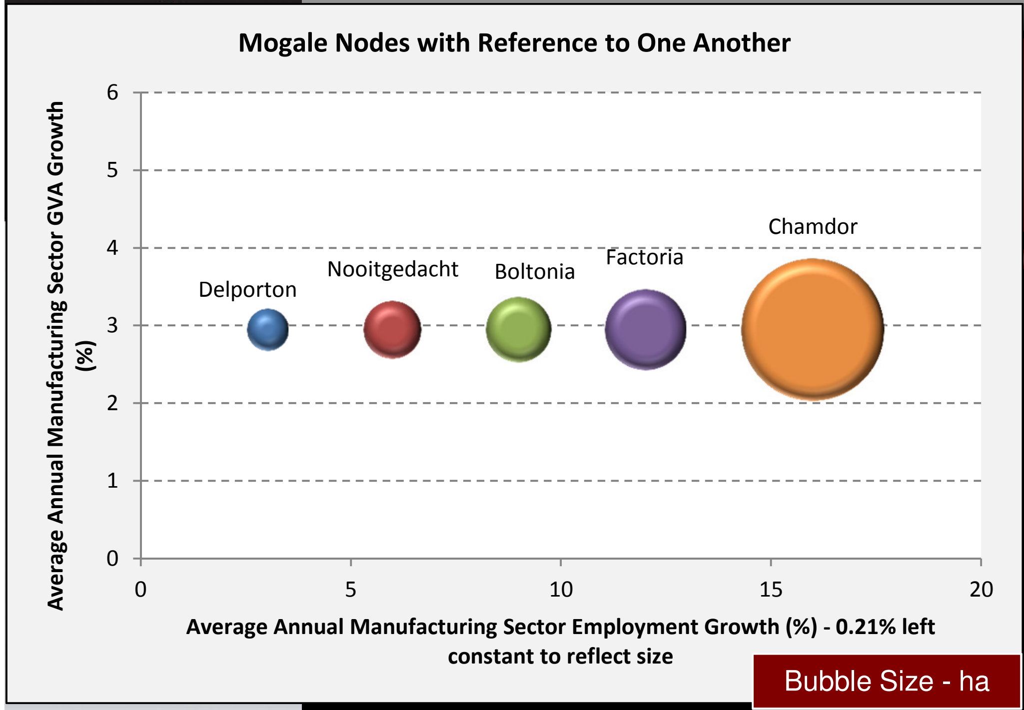
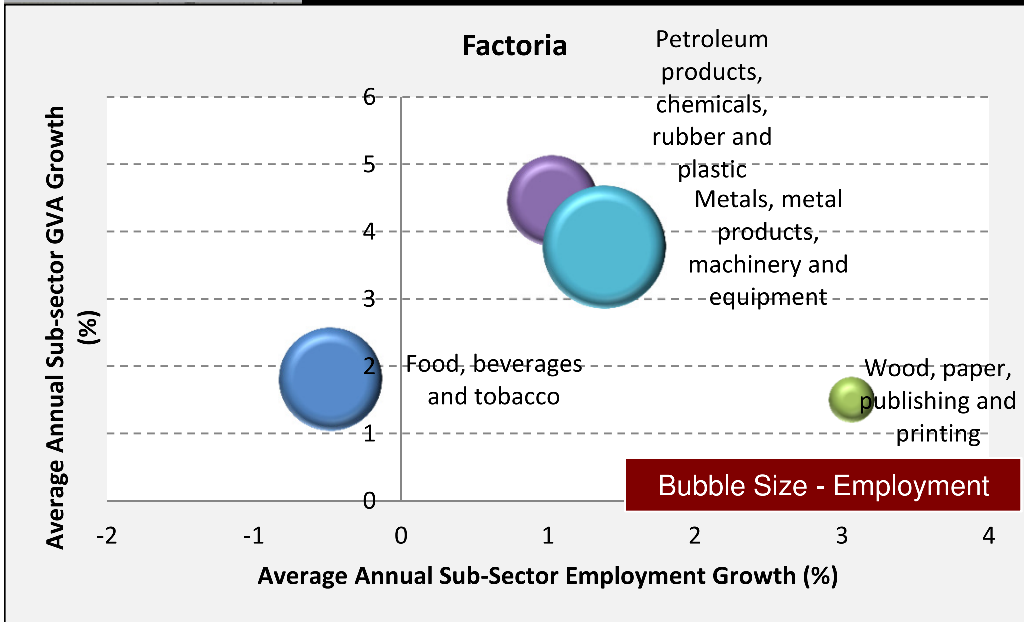
MOGALE CITY - FACTORIA





- ❖ Factoria is the third largest industrial node within Mogale
- ❖ 83.11ha in extent
- ❖ Pure industrial concerns: 33.3%
- ❖ Development opportunity - Vacant erfs: 6.0% (5.0ha)
- ❖ Note: 47.2% of land under multi-use.

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DEMACON market studies

A New Edge to Market Research

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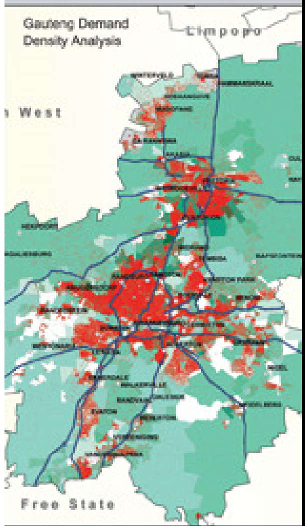
- Tourism / Shortstay accomodation
- MICE activities

Real Estate and Fiscal Impact Analysis

Demographics Profiling & LSM Profiling

Customer In-store Surveys

Refurbishment & Remerchandising studies



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MOGALE CITY - FACTORIA INDUSTRIAL NODE

- Prominent type of industries:
  - Multi-use
  - Heavy/ Noxious industries
  - General Industries

- Prominent activities:
  - Manufacturers of chemicals and chemical products i.e. paint – Kansia Plascon
  - Manufacturers of machinery and equipment - largely represented by Sandrik.
  - Manufacturers of basic metals an fabricated metal products except machinery and equipment - Cobra
  - Manufacturers of coke and refined petroleum products – Shell Depot

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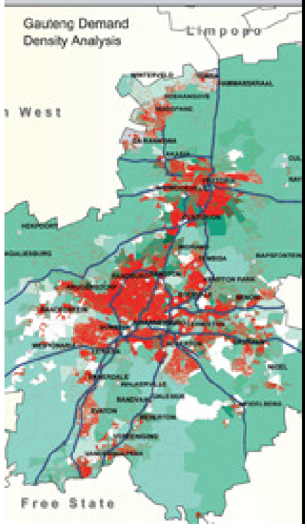

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MOGALE CITY - FACTORIA INDUSTRIAL NODE

Strengths

- The industrial area is located wedged between major movement spines (Voortrekker & Barratt Rd.).
- The industrial area is easily accessible.

Weaknesses

- The area is nearly fully developed, except for 5 Ha of vacant erven in total.

Opportunities

- The industrial area is located next to the Luipaardsvlei Station (no rail sidings though)
- Branding and security opportunities.

Threats

- The industrial area is surrounded by residential and other non-industrial uses.
- Limited future expansion potential

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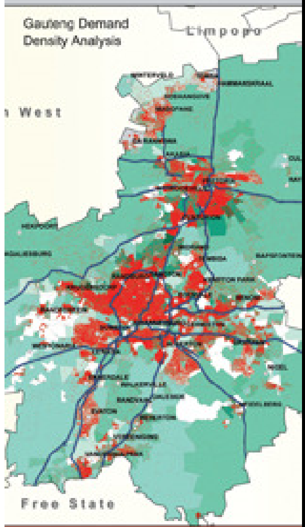

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MOGALE CITY INDUSTRIAL NODES

- Boltonia
- Chamdor
- Delporton
- Factoria
- **Fariaville**
- Muldersdrift
- Nooitgedacht

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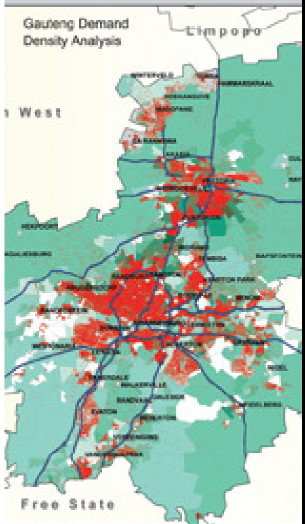

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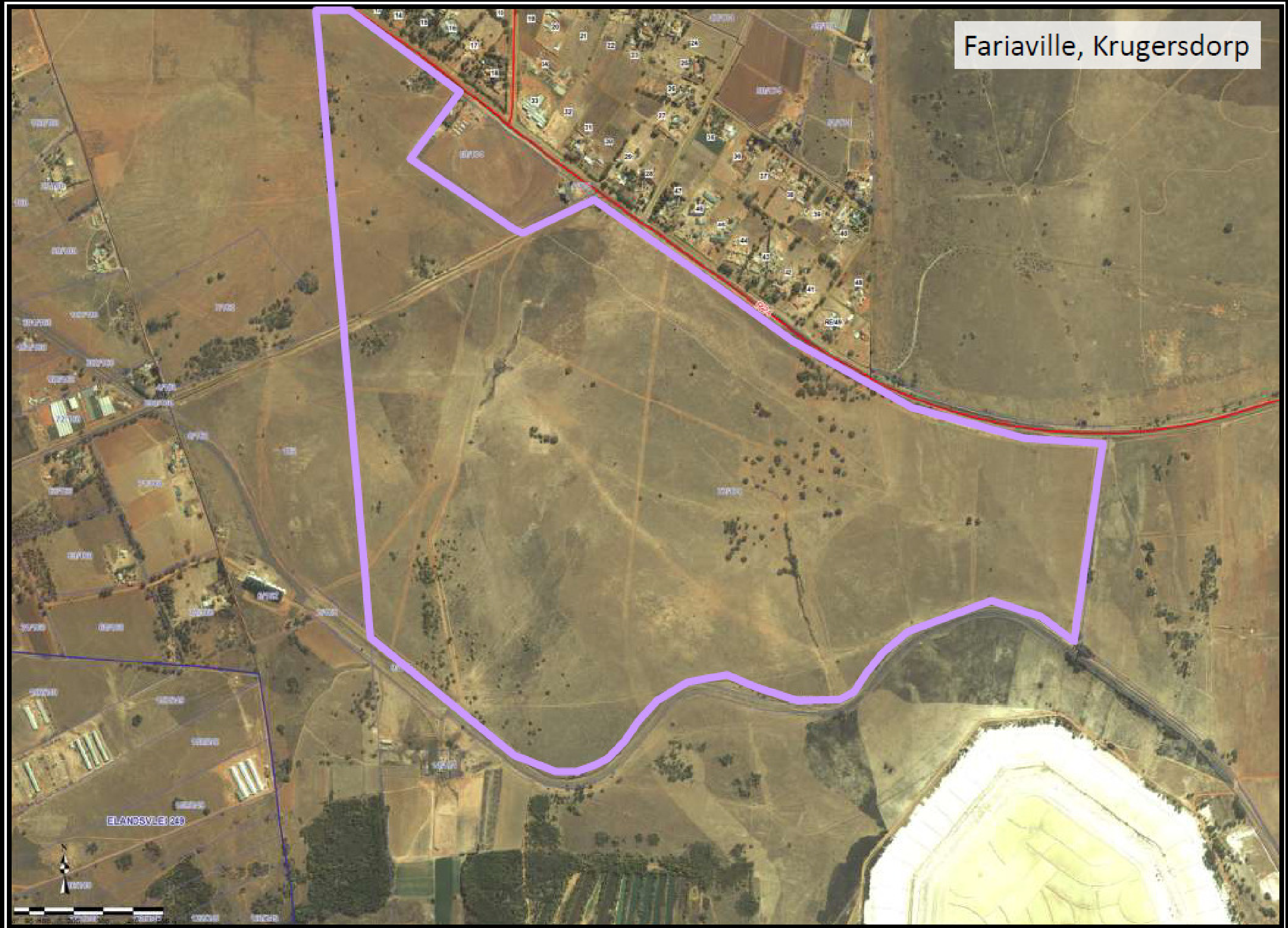
MOGALE CITY - FARIAVILLE INDUSTRIAL NODE



MOGALE CITY - FARIAVILLE INDUSTRIAL NODE

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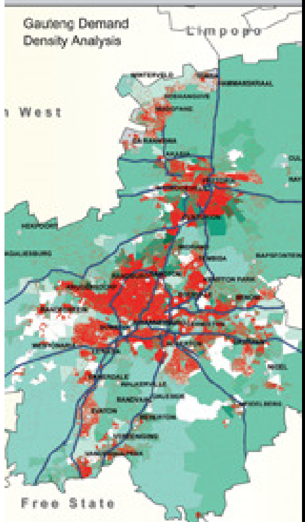

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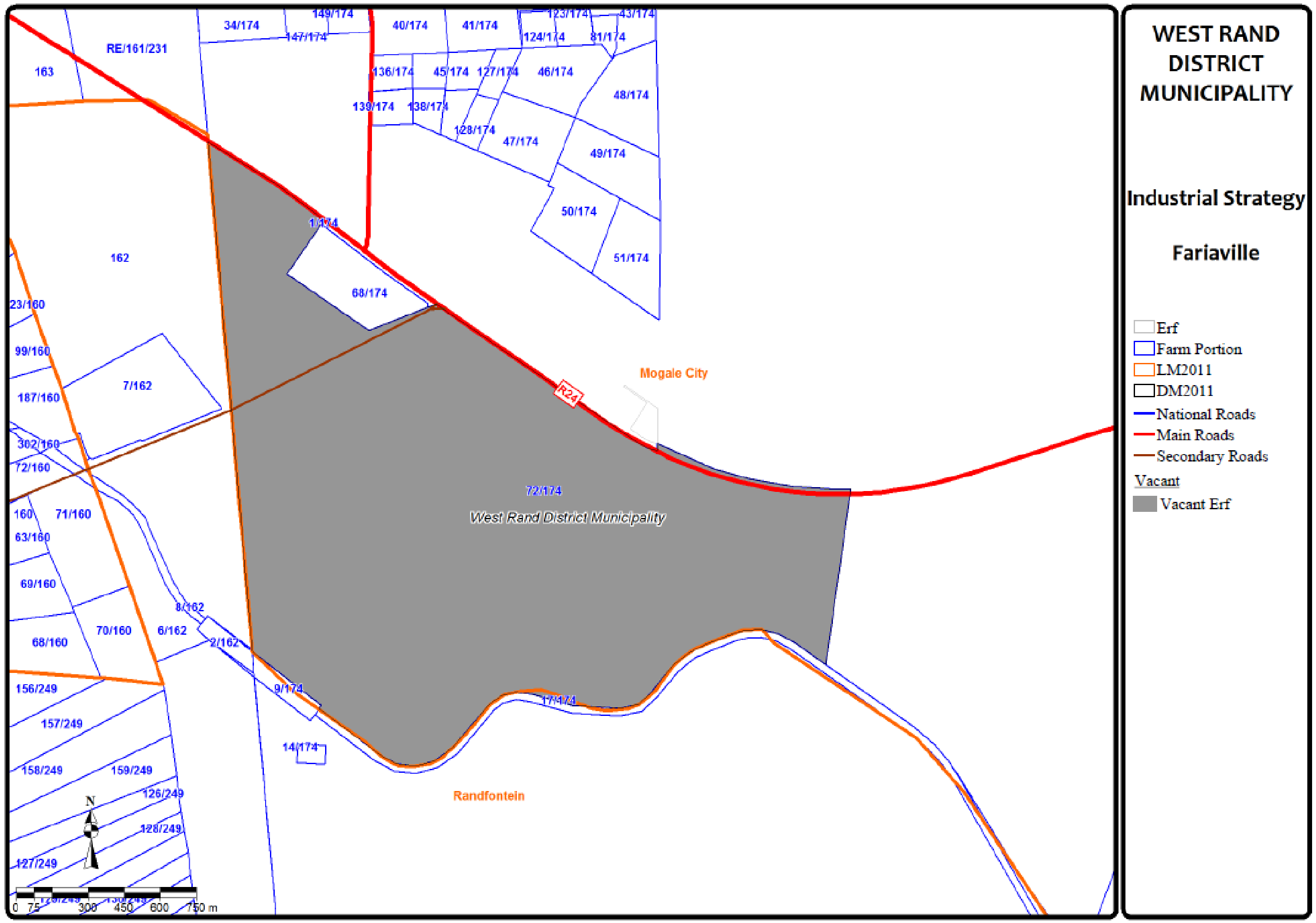
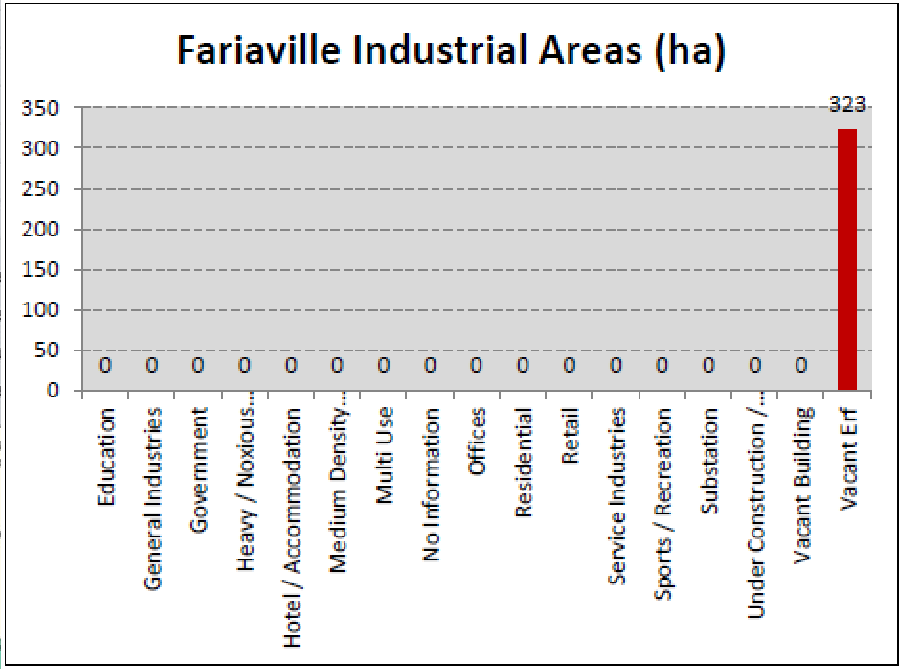
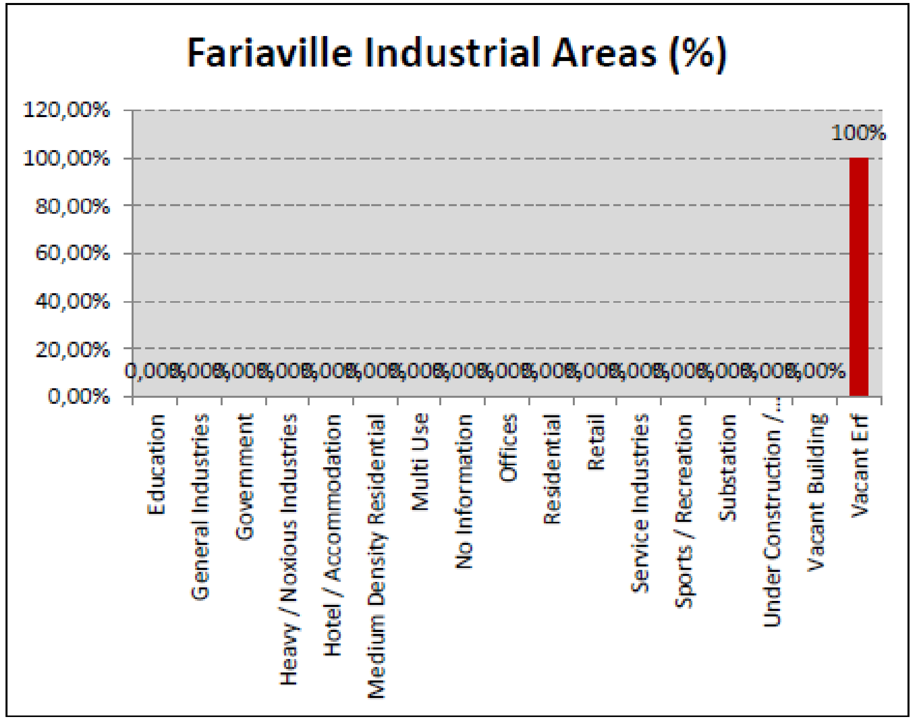


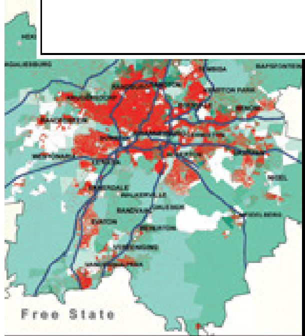
MOGALE CITY - FARIAVILLE INDUSTRIAL NODE



- Main industrial land use:
  - Vacant (323ha / 100%)



- Fariaville Total Industrial Area: 323ha



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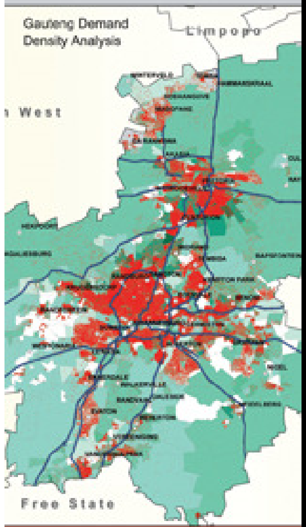

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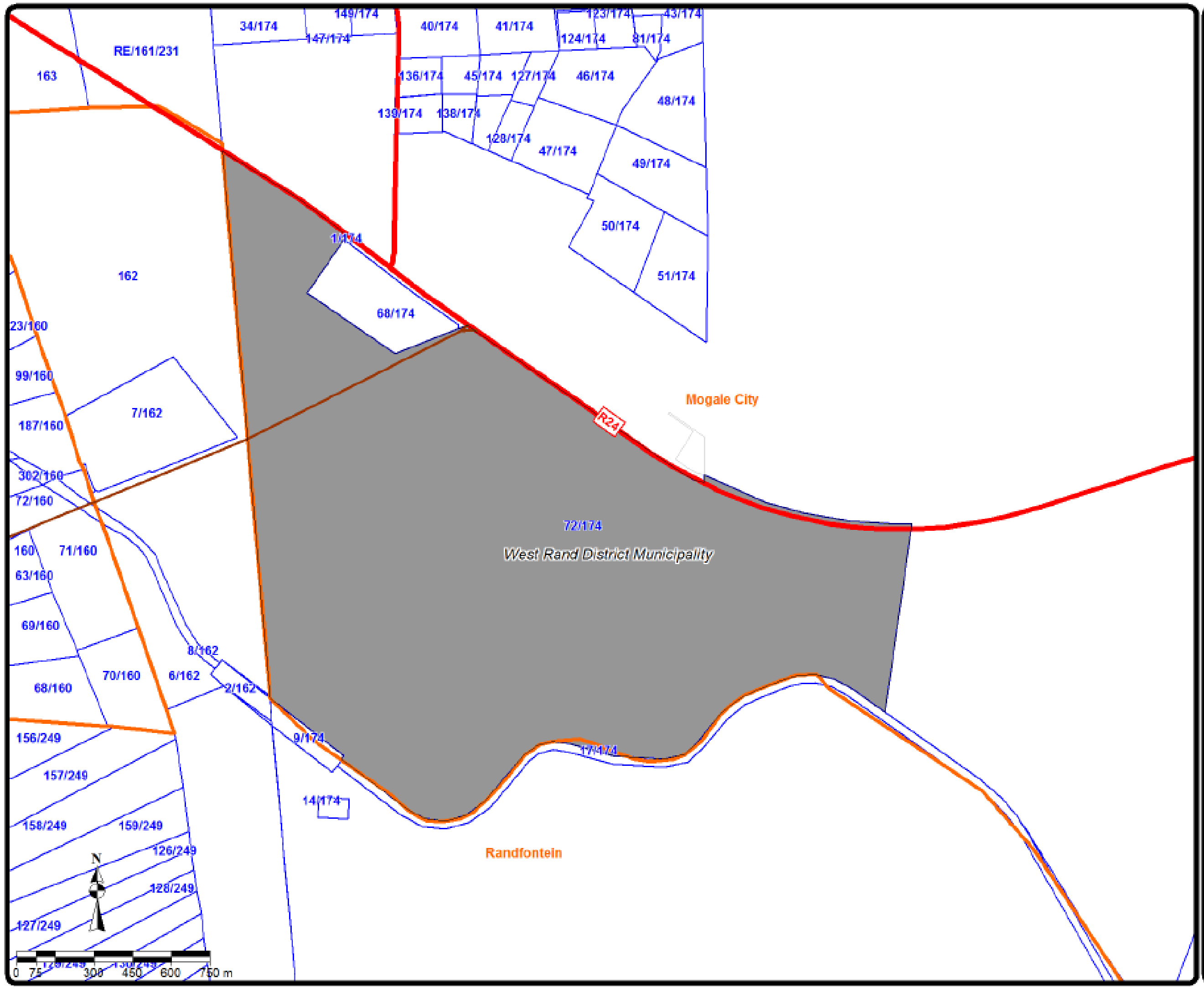

WEST RAND DISTRICT MUNICIPALITY

INDUSTRIAL STRATEGY

SIC Classification Fariaville

- Erf
- Farm Portion
- LM2011
- DM2011
- National Roads
- Main Roads
- Secondary Roads

Vacant

- Vacant Erf

DEMACON market studies

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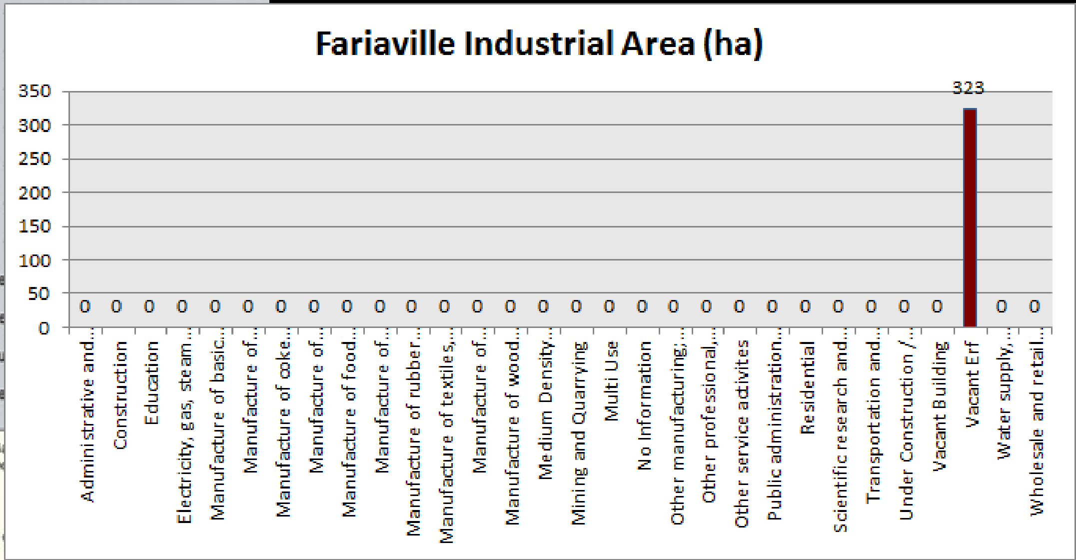
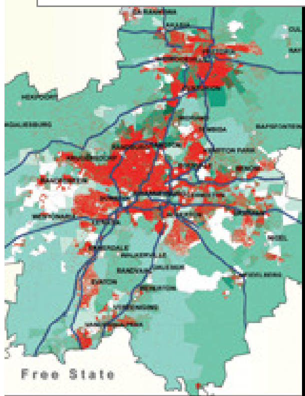
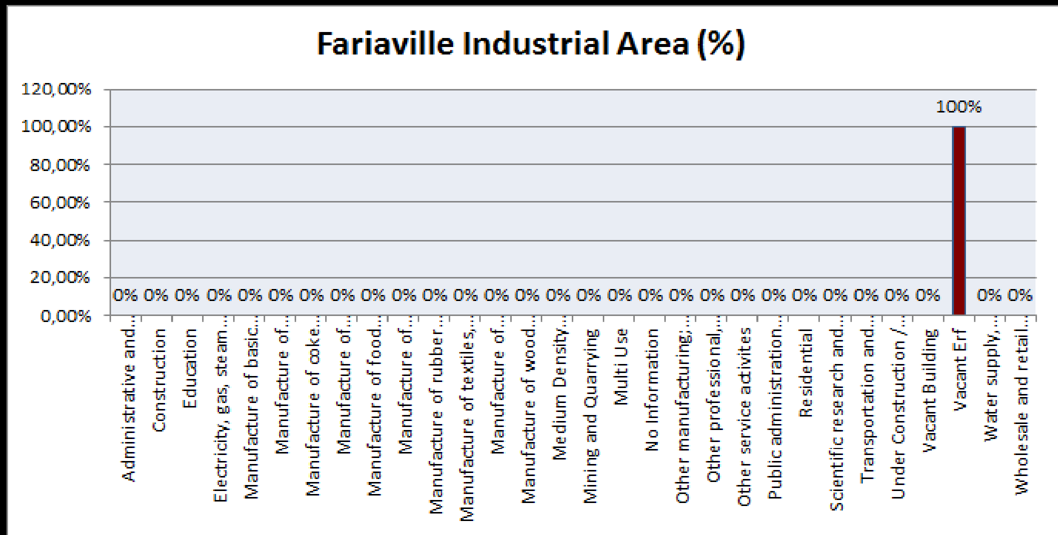
Real Estate Market Studies

MOGALE CITY - FARIAVILLE INDUSTRIAL NODE



- Main industrial activities:
  - Vacant (323ha / 100%)





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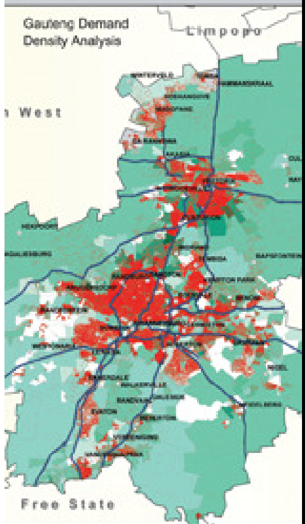

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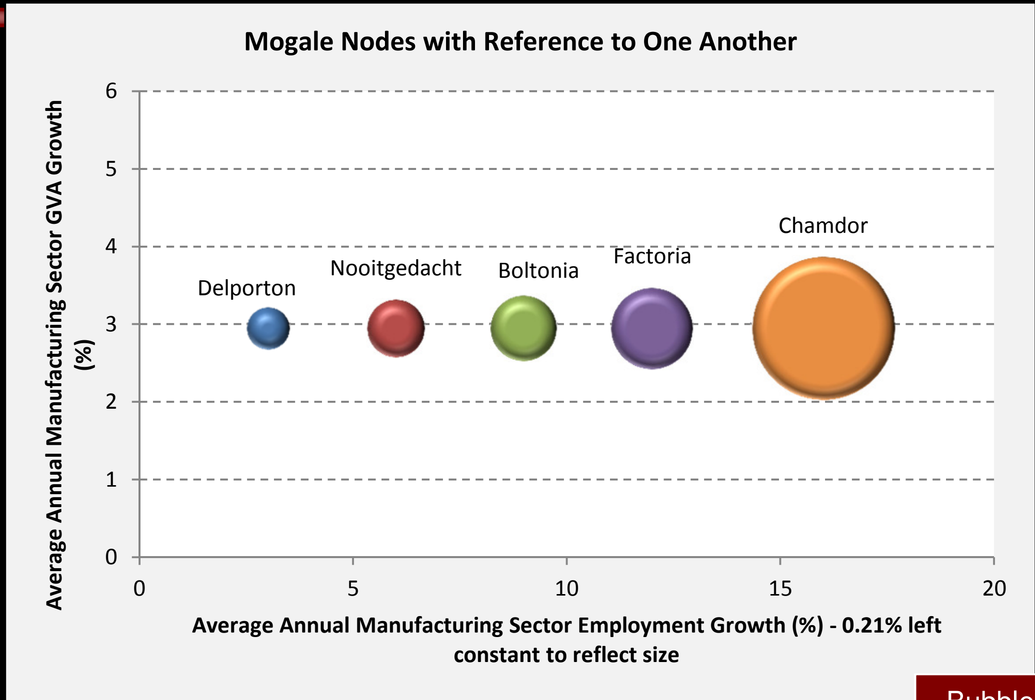
MOGALE CITY - FARIAVILLE



Bubble Size - ha

- ❖ Fariaville represents the largest of the industrial nodes in Mogale City – however given it is totally vacant it is not reflected above.
- ❖ 323.47 ha in extent
- ❖ Development opportunity - Vacant erfs: 100%.

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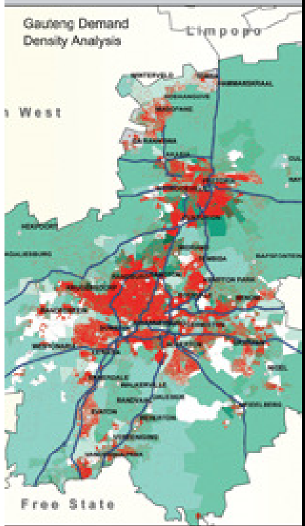

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MOGALE CITY - FARIAVILLE INDUSTRIAL NODE

Strengths

- The site is still not developed – vacant.

- Industrial land use rights are in place.

Weaknesses

- A site layout plan has been commissioned. (not completed yet)

Opportunities

- A proper industrial precinct plan should be developed for the area.

Threats

- Vacant, unutilised land

DEMACON market studies

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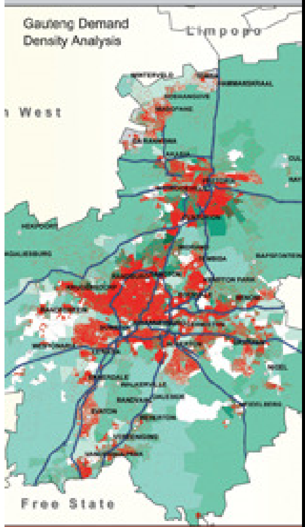

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MOGALE CITY INDUSTRIAL NODES

- Boltonia
- Chamdor
- Delporton
- Factoria
- Fariaville
- **Muldersdrift**
- Nooitgedacht

DEMACON market studies

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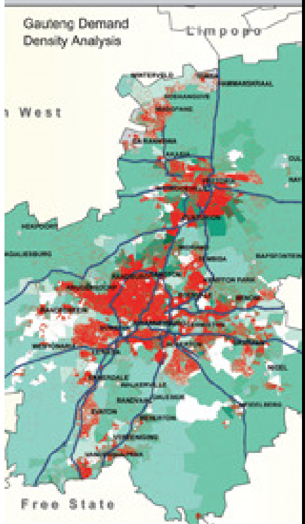

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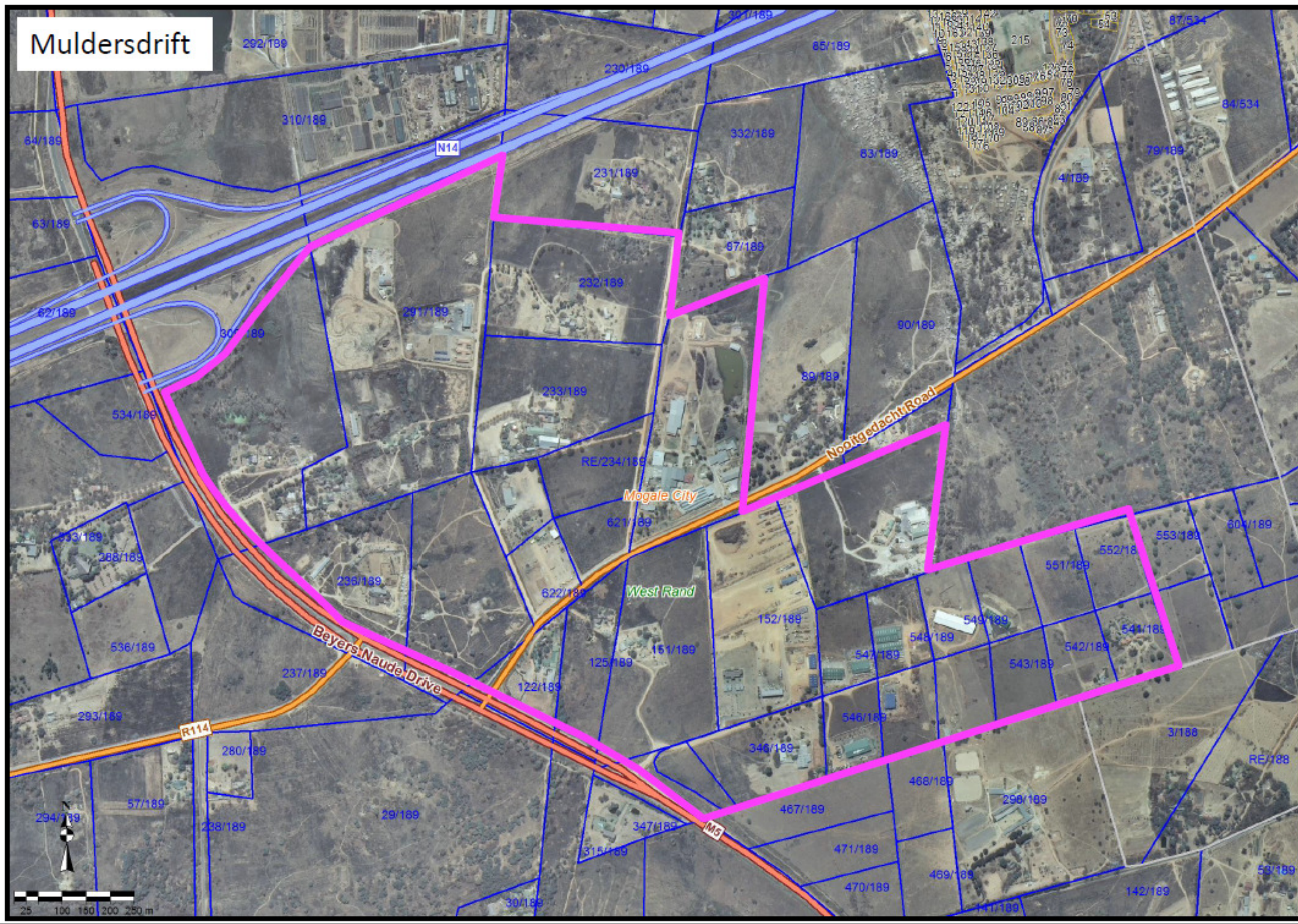
MOGALE CITY - MULDERSDRIFT INDUSTRIAL NODE



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A New Edge to Market Research

MOGALE CITY - MULDERSDRIFT INDUSTRIAL NODE

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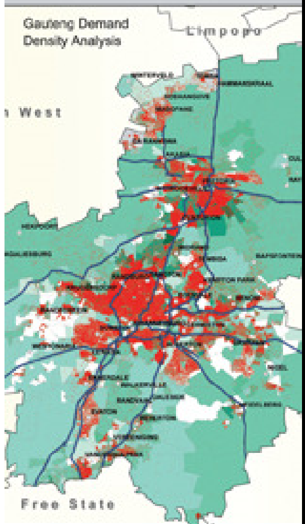

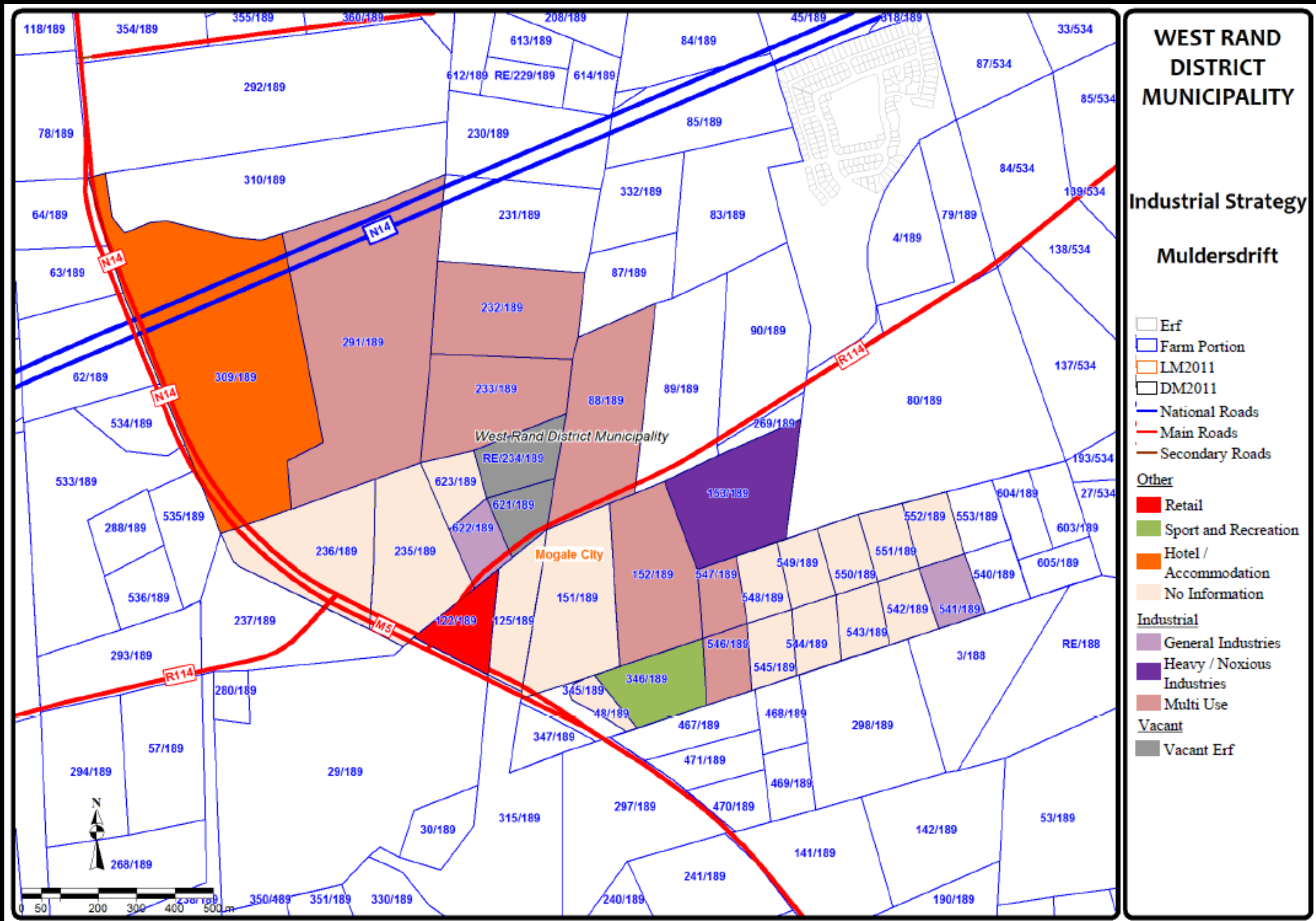

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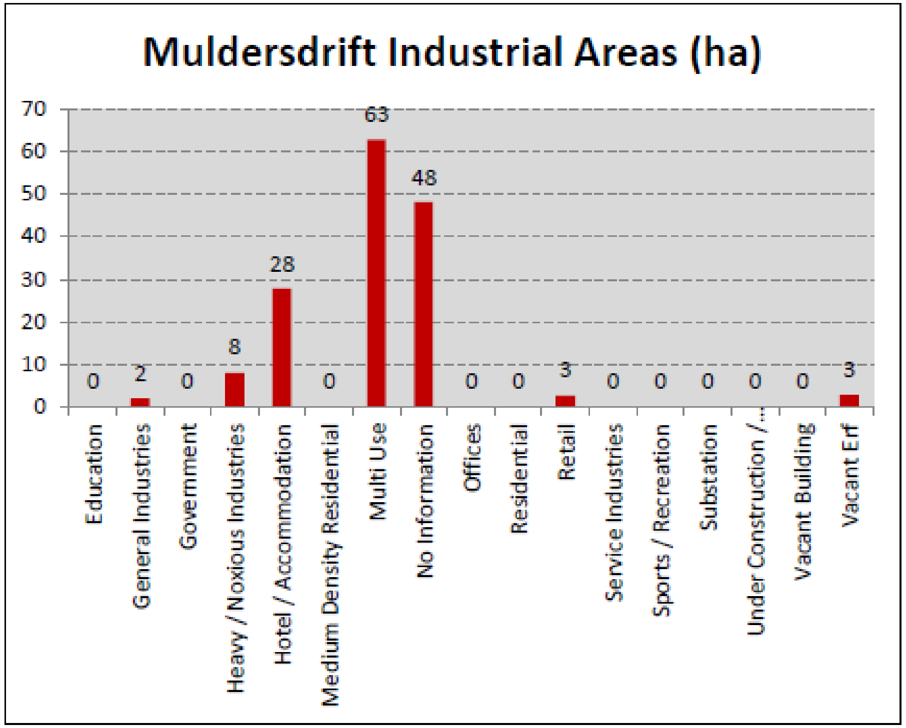
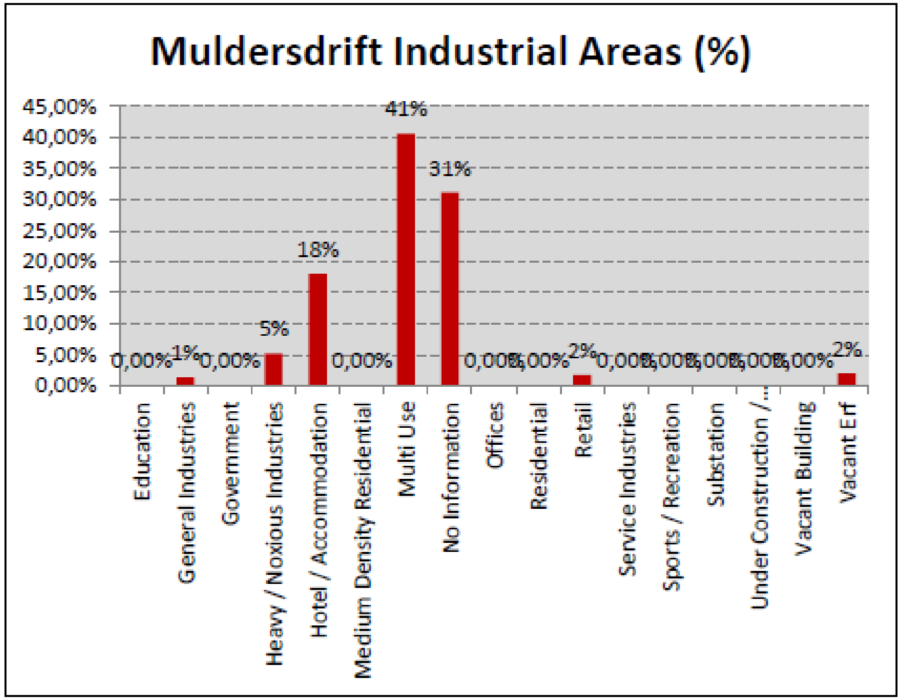
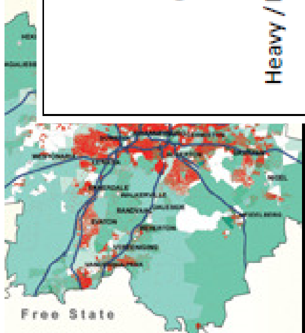
MOGALE CITY - MULDERSDRIFT INDUSTRIAL NODE



- Main industrial land use:
  - Multi use (63ha / 41%)
  - No information (48ha / 31%
  - Heavy / Noxious industries (28ha / 18%)
  - Retail (3ha / 2%)



- Muldersdrift Total Industrial Area: 154ha



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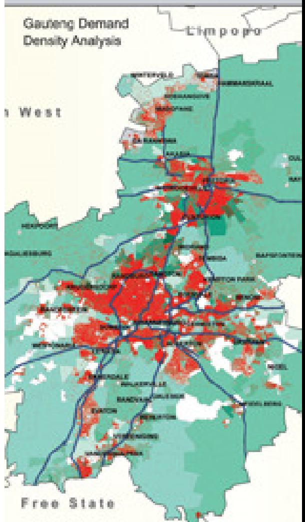

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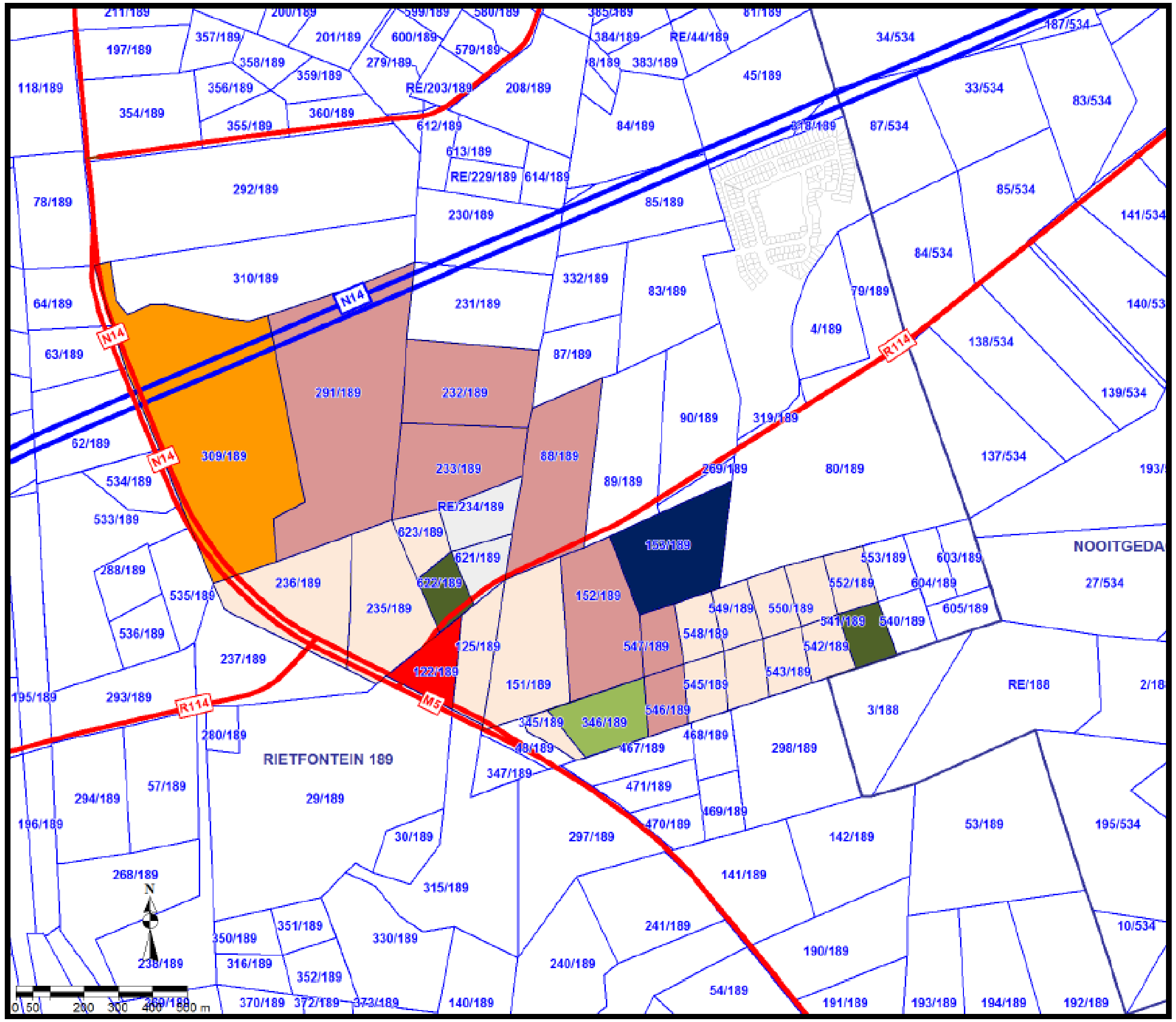
MOGALE CITY - MULDERSDRIFT INDUSTRIAL NODE



WEST RAND DISTRICT MUNICIPALITY

INDUSTRIAL STRATEGY

SIC Classification Muldersdrift

- Erf
- Farm Portion
- Holding
- Parent Farm
- National Roads
- Main Roads
- Secondary Roads

Other
- Accommodation and food service activities
- Arts, entertainment and recreation
- Wholesale and retail trade, repair of motor vehicles and motorcycles
- No Information

Industrial
- Manufacture of rubber and plastic products, and other non-metallic mineral products
- Manufacture of transport equipment
- Transportation and storage
- Multi Use

Vacant
- Vacant Erf

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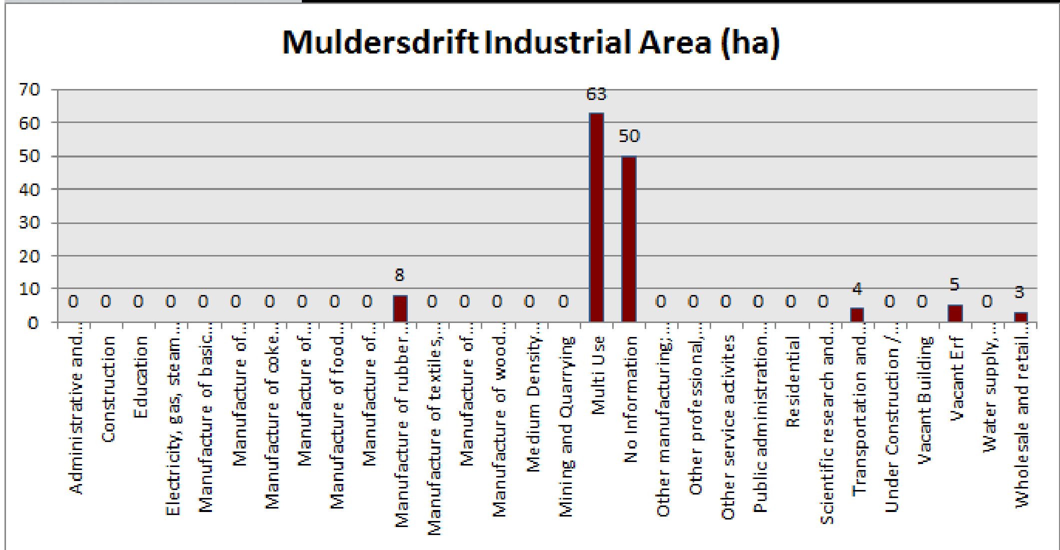
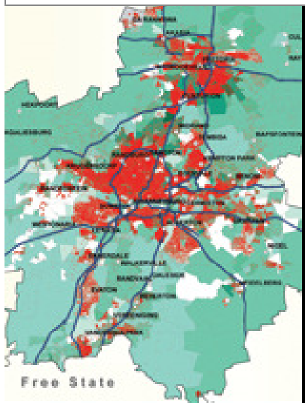
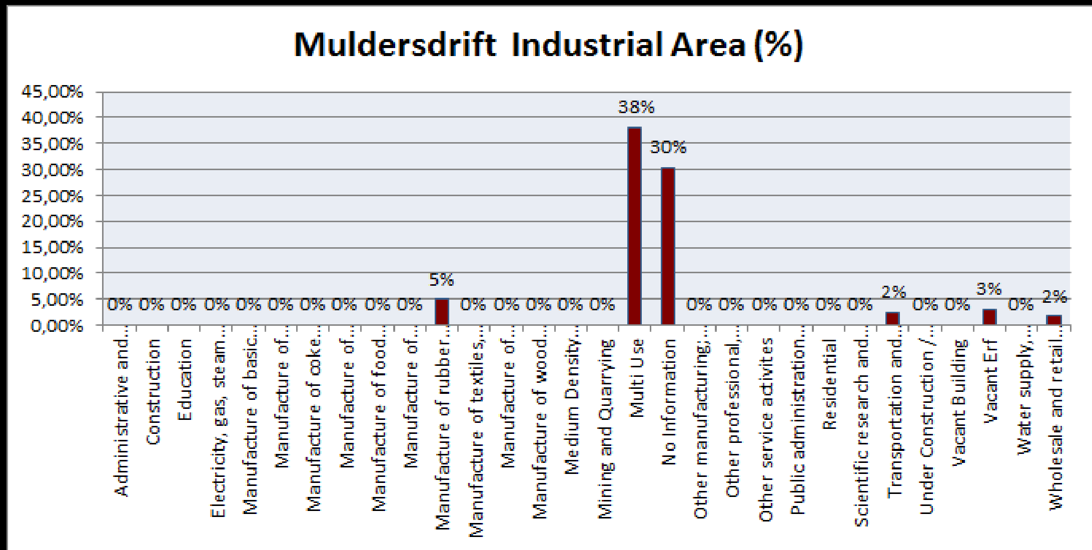


- Main industrial activities:
  - Multi-use (63ha / 38%)
  - No information (50ha / 30%)
  - Manufacture of rubber and plastic products, and other non-metallic mineral products (8ha / 5%)
  - Vacant (5h / 3%)





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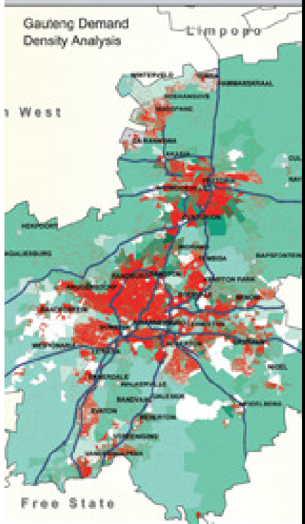

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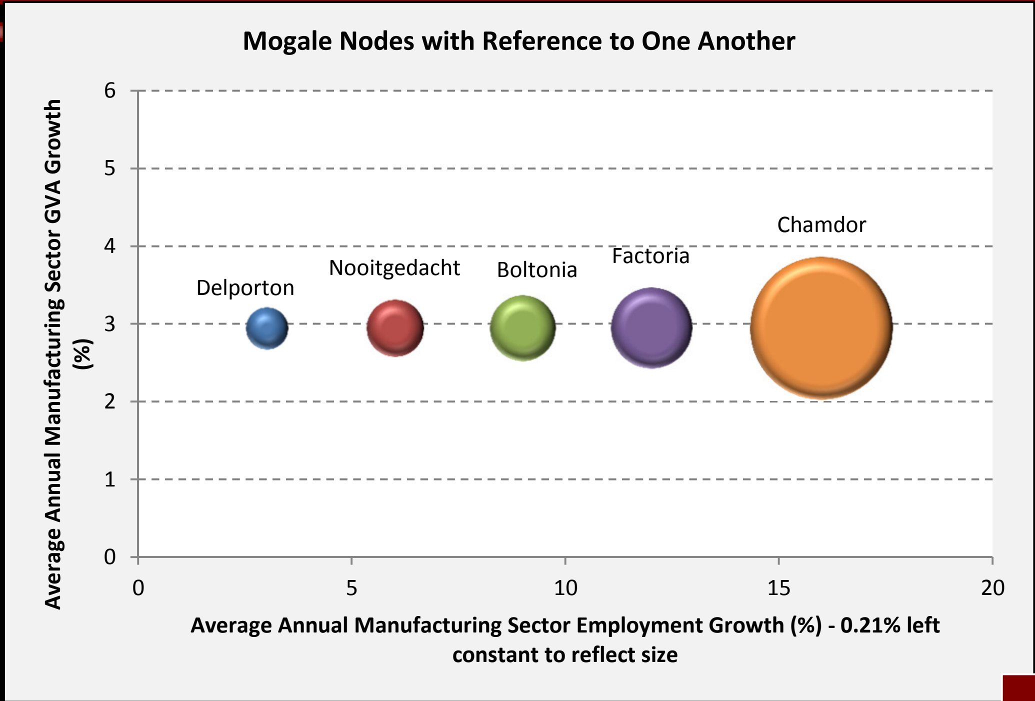
MOGALE CITY - MULDERSDRIFT



Bubble Size - ha

- Muldersdrift is characterised by limited industrial concerns and predominantly reflect a land holding character.
- 164.18ha in extent
- Pure industrial concerns: 4.9%
- Development opportunity - Vacant erfs: 3.0% (5.0ha).
- Note:
  - 38.2% of land are occupied by multi-use
  - 30.5% of land use could not be identified.

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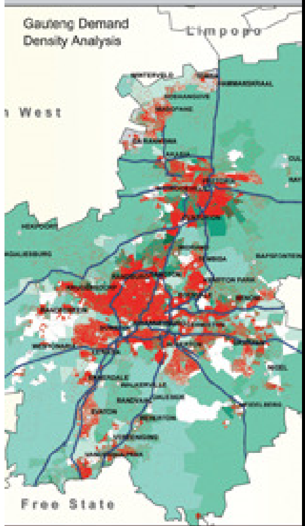

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MOGALE CITY - MULDERSDRIFT INDUSTRIAL NODE

- Prominent type of industries:
  - Multi-use sites (typical transitional uses).
- Prominent activities:
  - For many of the remaining farm portions, no information could be found regarding the activities that take place and/or the land is vacant.

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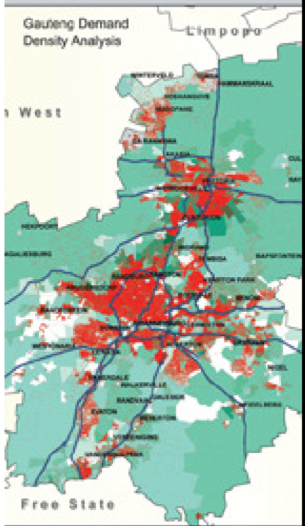

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MOGALE CITY - MULDERSDRIFT INDUSTRIAL NODE

Strengths

- The industrial area is located along the N14.

Weaknesses

- Weak brand & vision

Opportunities

- Excellent location

Threats

- Uncontrolled transitional uses & illegal land uses
- Sprawling informal housing

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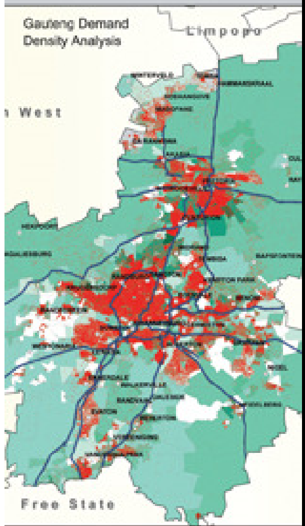

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MOGALE CITY INDUSTRIAL NODES

- Boltonia
- Chamdor
- Delporton
- Factoria
- Fariaville
- Muldersdrift
- **Nooitgedacht**

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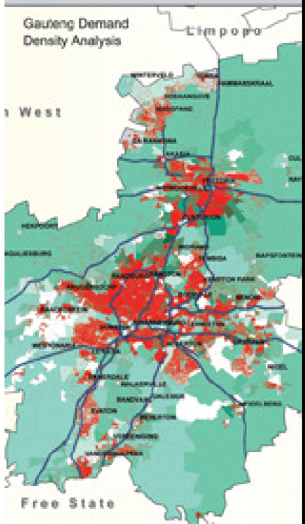

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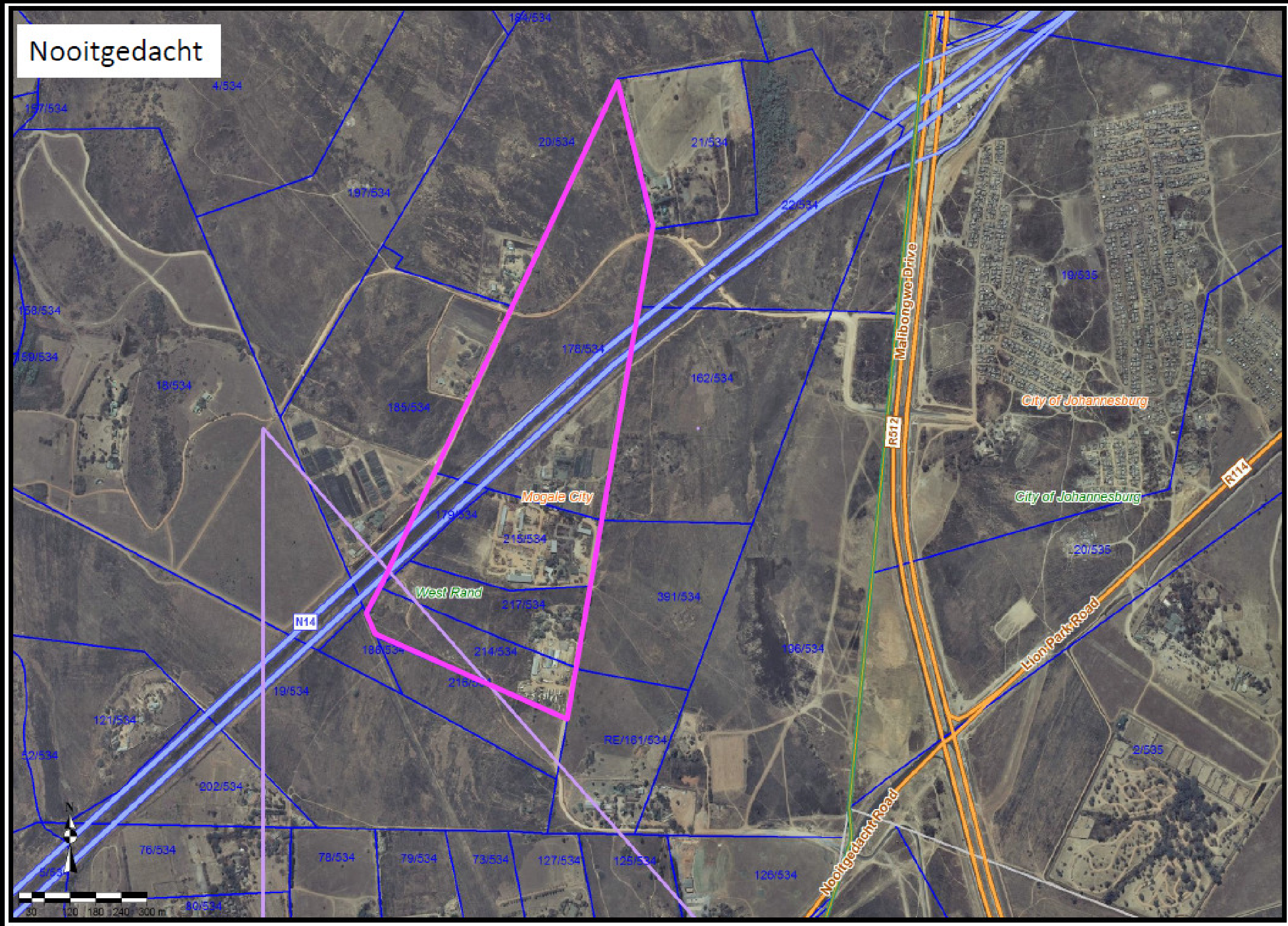
MOGALE CITY - NOOITGEDACHT INDUSTRIAL NODE



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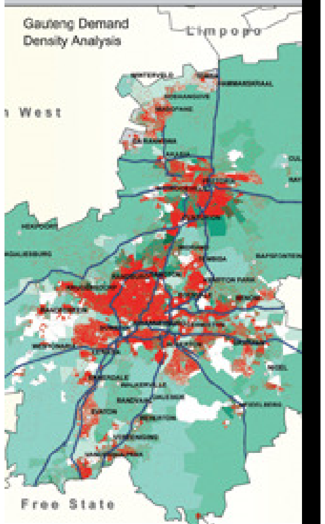

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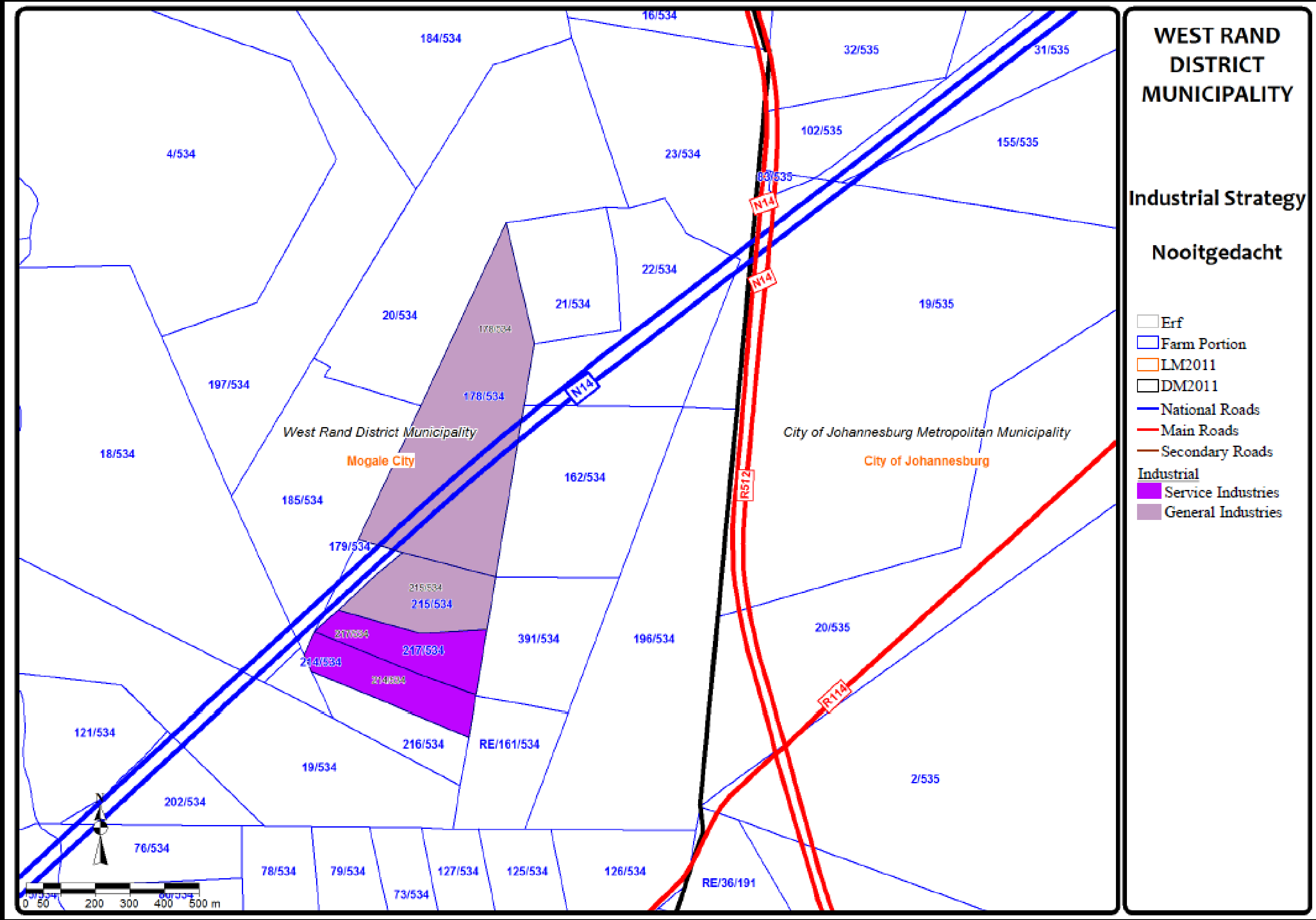

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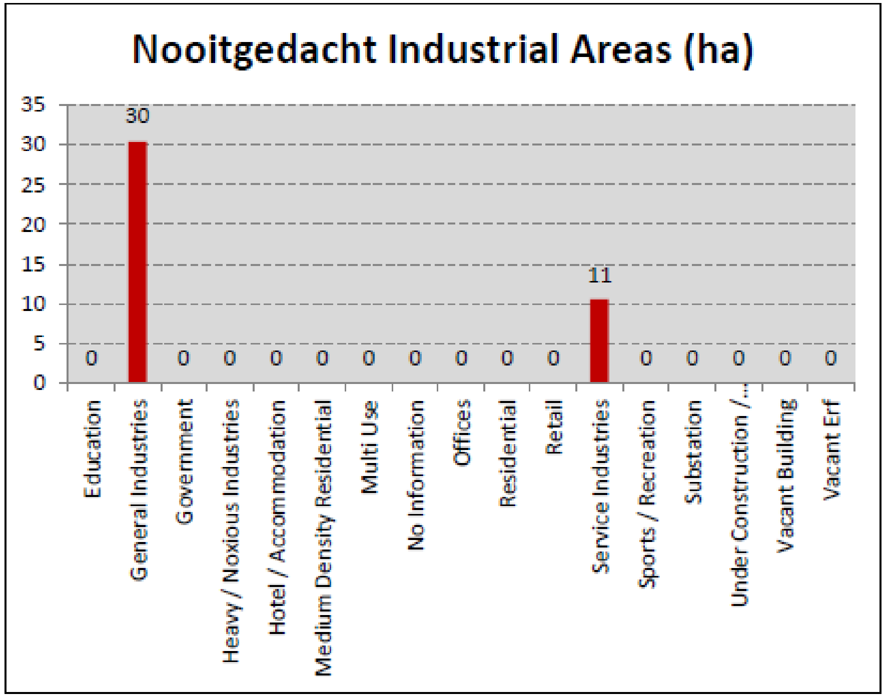
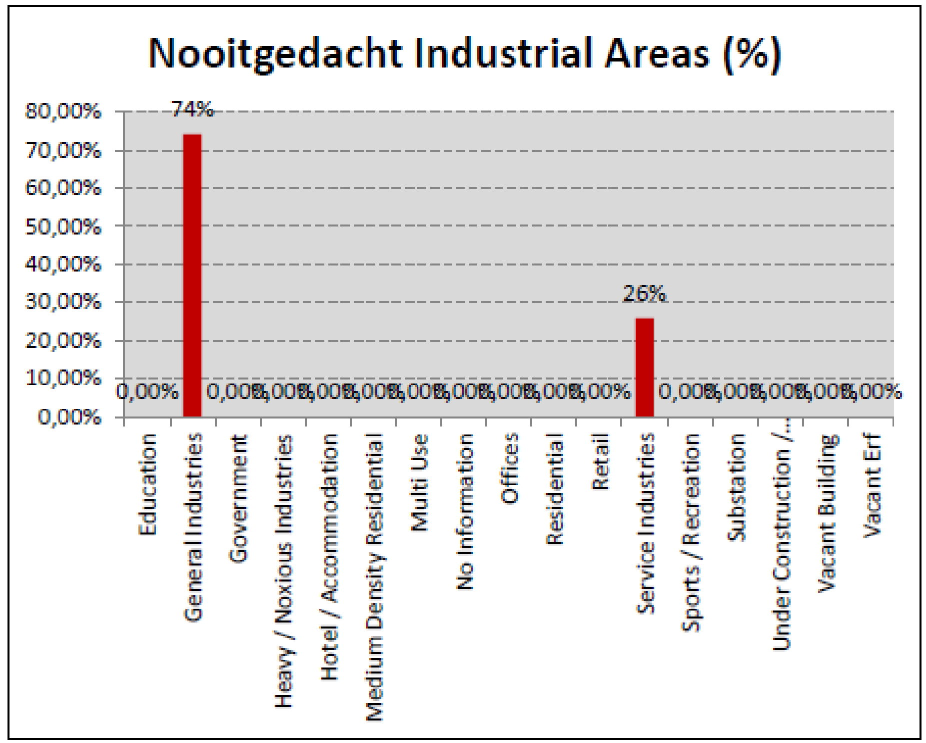


- Main industrial land use:
  - General industries (30ha / 74%)
  - Service industries (11ha / 26%)

- Noothedacht Total Industrial Area: 41ha



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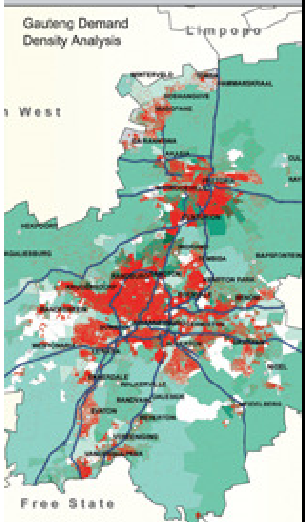

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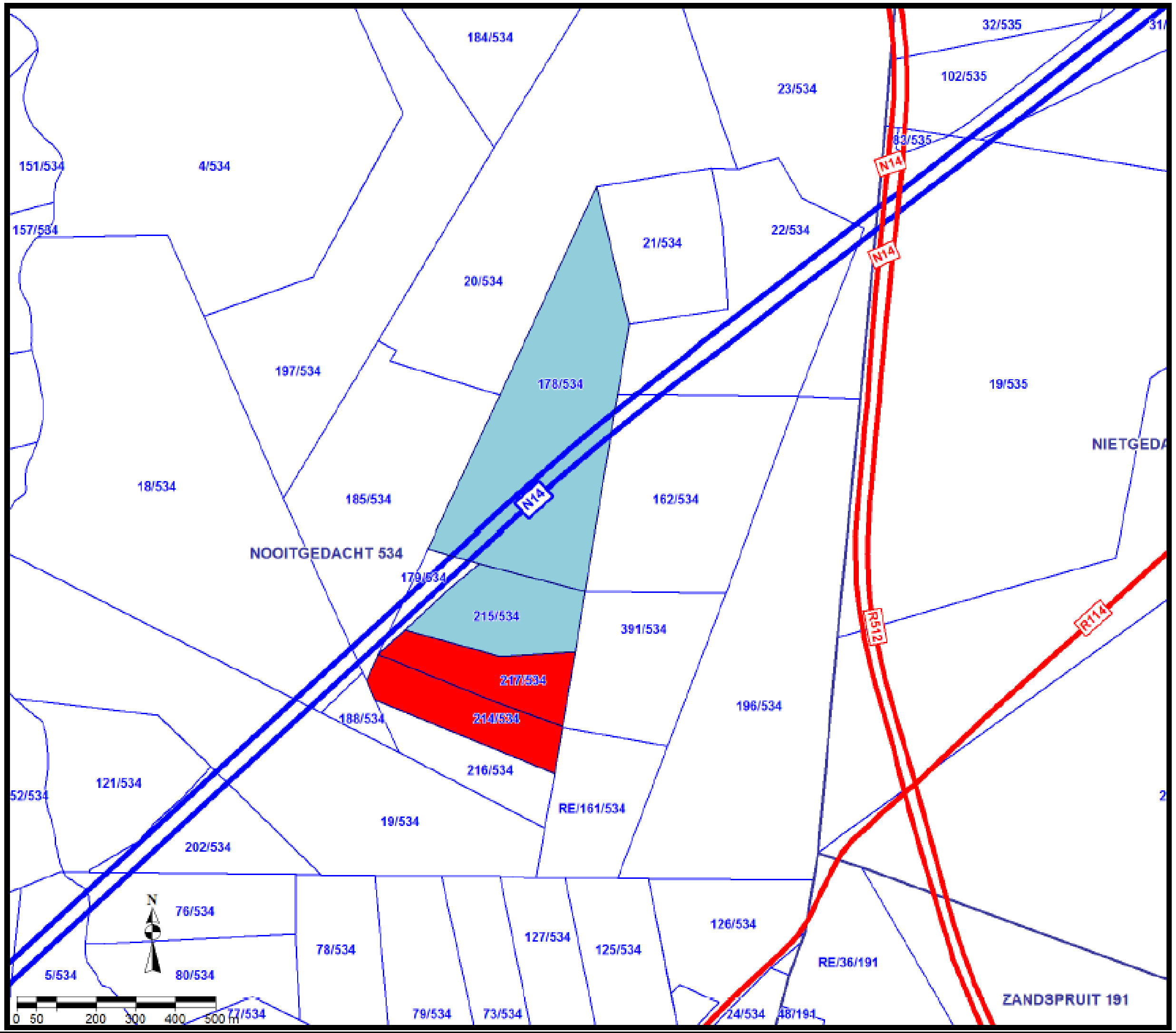

WEST RAND DISTRICT MUNICIPALITY

INDUSTRIAL STRATEGY

SIC Classification Nooitgedacht

- Erf
- Farm Portion
- Holding
- Parent Farm
- National Roads
- Main Roads
- Secondary Roads

Other
- Wholesale and retail trade, repair of motor vehicles and motorcycles

Industrial
- Construction

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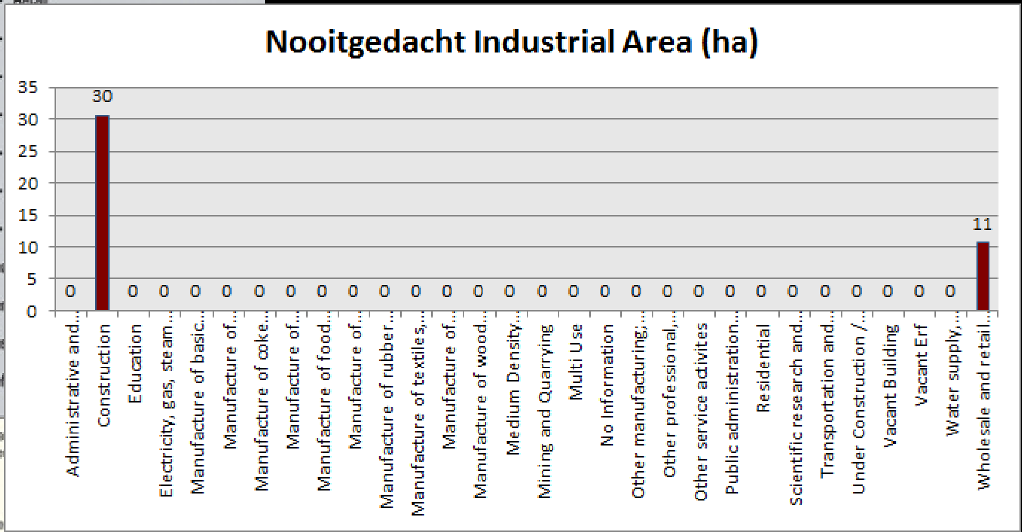
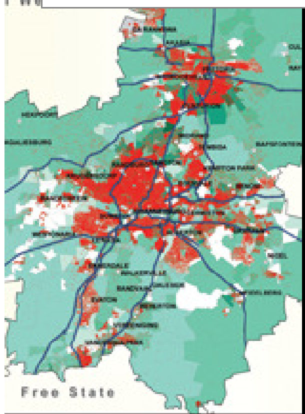
Real Estate Market Studies

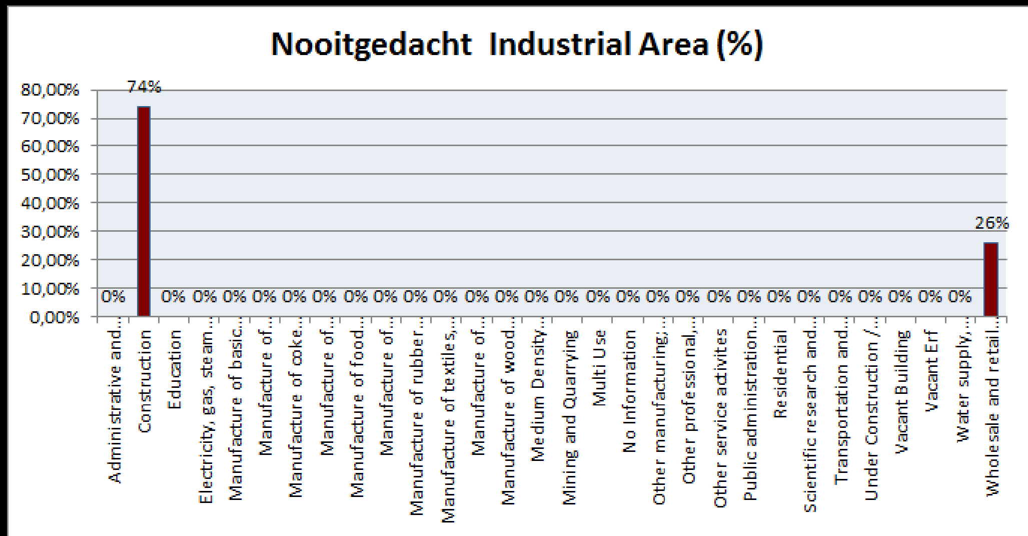
- Retail

MOGALE CITY - NOOITGEDACHT INDUSTRIAL NODE



- Main industrial activities:
  - Construction (30ha / 74%)
  - Wholesale and retail trade, repair of motor vehicles and motorcycles (11ha / 26%)





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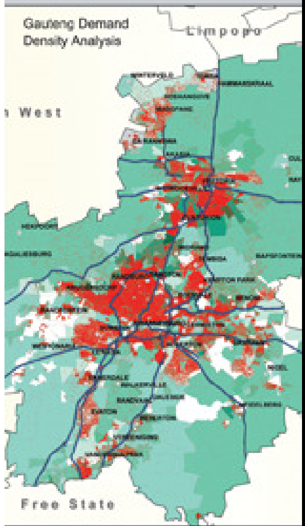

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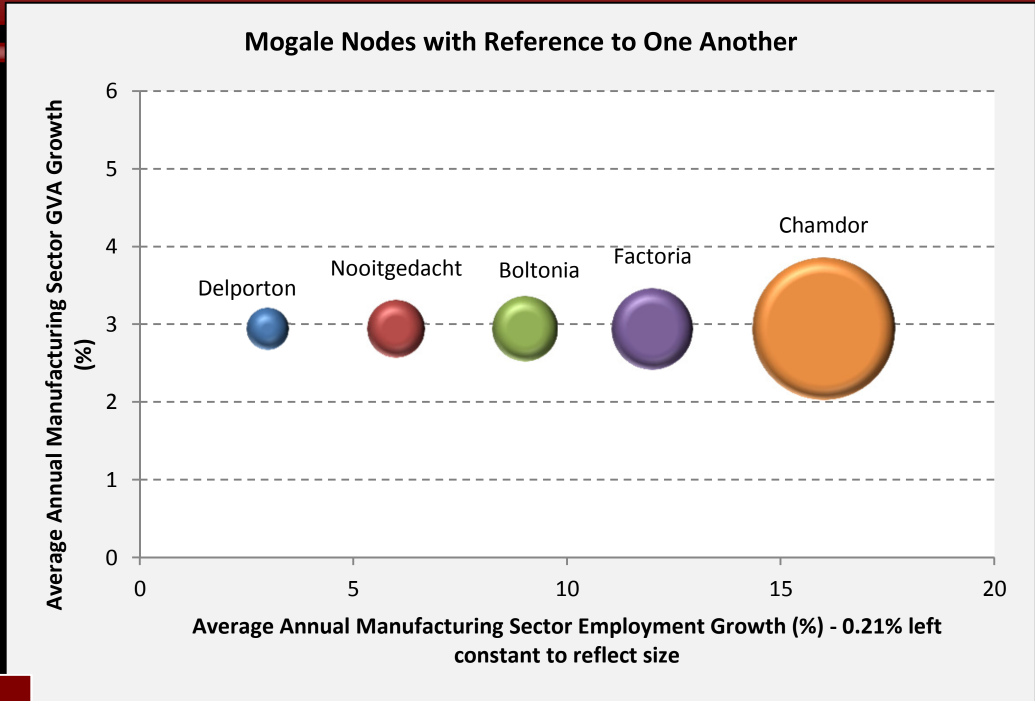
MOGALE CITY - NOOITGEDACHT



Bubble Size - ha

❖ Nooitgedacht represents the second smallest of the industrial nodes in Mogale

❖ 41.06ha in extent

❖ Pure industrial concerns: 0.0%

❖ Development opportunity - Vacant erfs: 0%

❖ Consists of:

- 74.2% wholesale, retail & automotive related services
- 25.8% construction related businesses.

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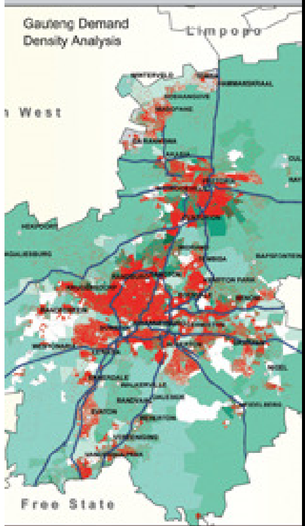

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MOGALE CITY - NOOITGEDACHT INDUSTRIAL NODE

- Prominent type of industries:
  - Service Industries
  - General Industries

- Prominent activities:
  - Wholesale and retail trade, auto-repairs
  - Construction-related activities.

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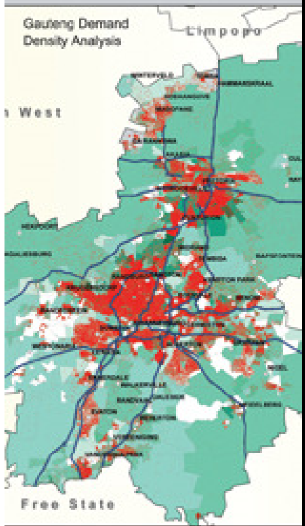

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MOGALE CITY - NOOITGEDACHT INDUSTRIAL NODE

Strengths

- The industrial area is located along the N14.

Weaknesses

- Weak brand & vision

Opportunities

- Excellent location

Threats

- Uncontrolled transitional uses & illegal land uses
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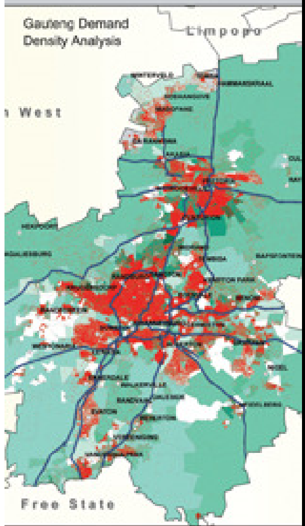

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RANDFONTEIN LOCAL MUNICIPALITY

- Randfontein Industrial Sector and Sub-Sector Competitiveness Analysis
- Nodal Analysis

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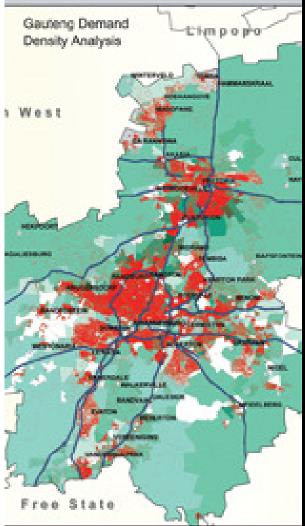

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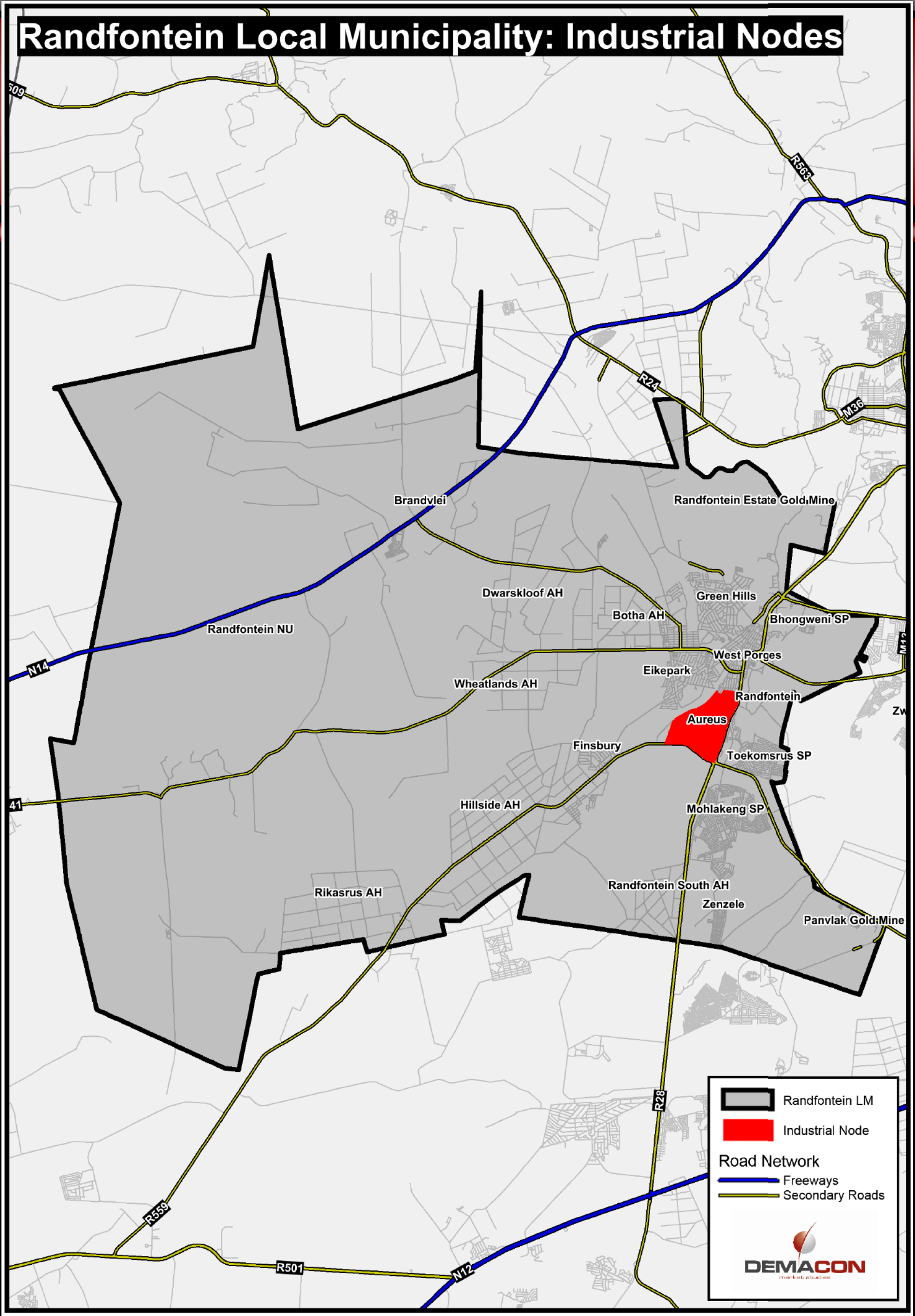
RANDFONTEIN LM – OVERVIEW

- Randfontein emerged as a gold mining town during the late 1800s.
- With the Witwatersrand gold rush in full swing, mining financier JB Robinson bought the farm Randfontein and, in 1889, established the Randfontein Estates Gold Mining Company.
- The town was established in 1890 to serve the new mine and was administered by Krugersdorp until it became a municipality in 1929.
- Apart from having the largest stamp mill in the world (used in early paper making for preparing the pulp), Randfontein, like many of the other outlying areas of Johannesburg, is essentially a rural collection of farms and small holdings in a particularly beautiful part of Gauteng.
- Randfontein includes Mohlakeng and Toekomsrus.

RANDFONTEIN INDUSTRIAL NODES



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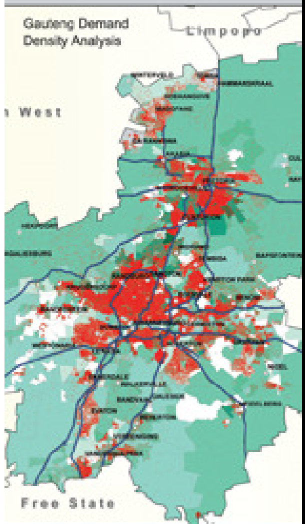

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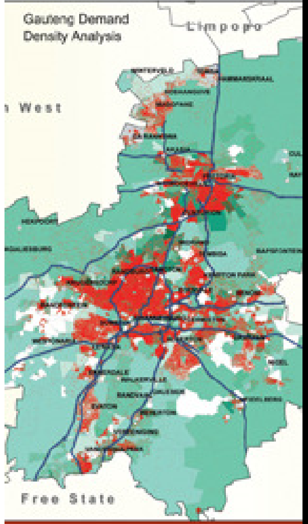

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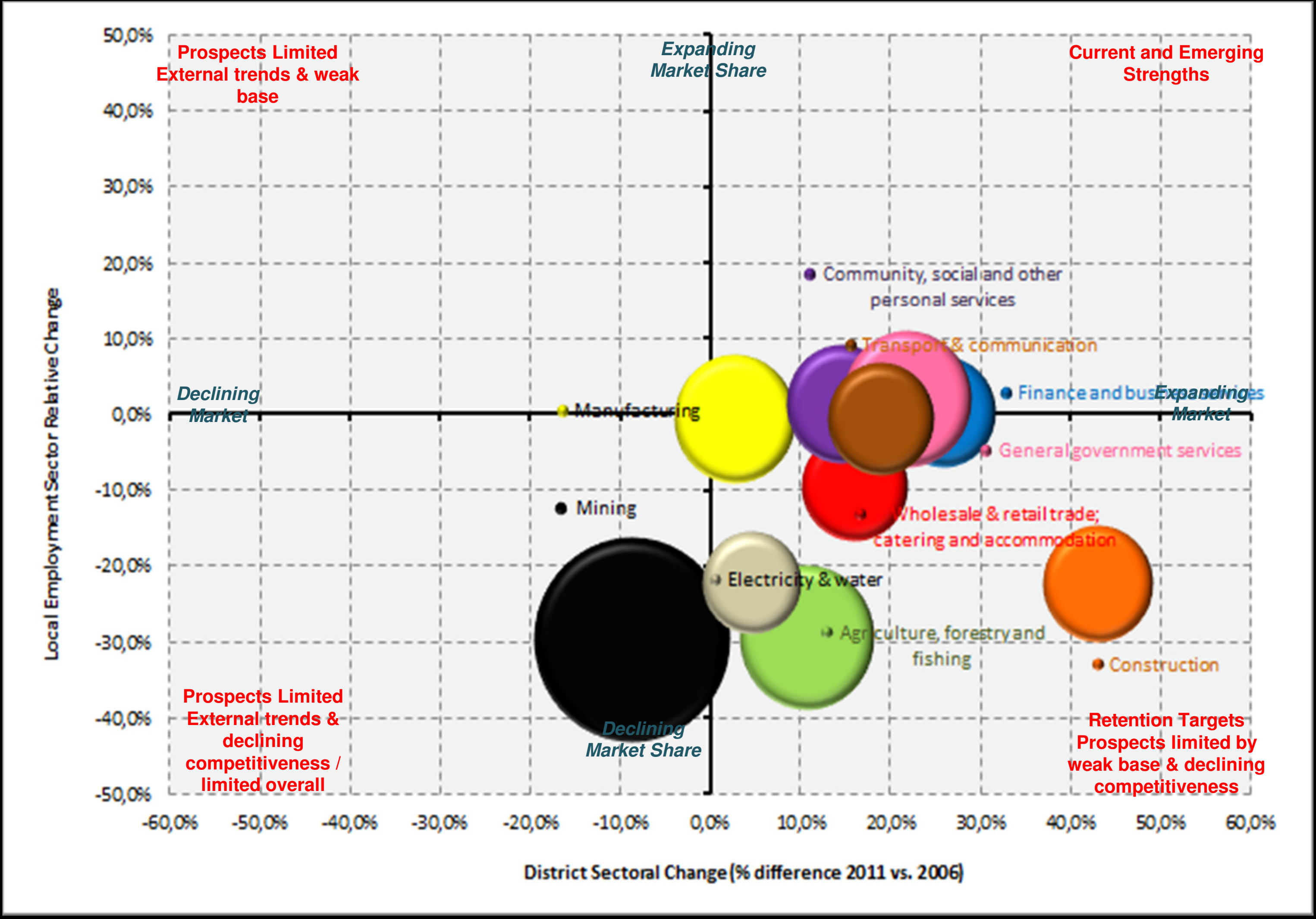
RANDFONTEIN KEY SECTORS



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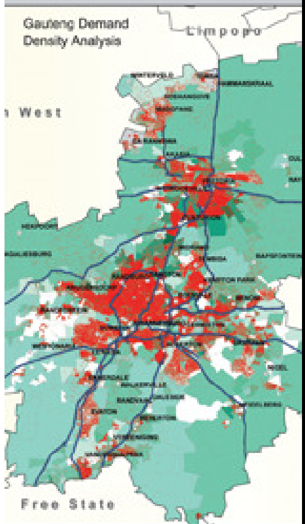

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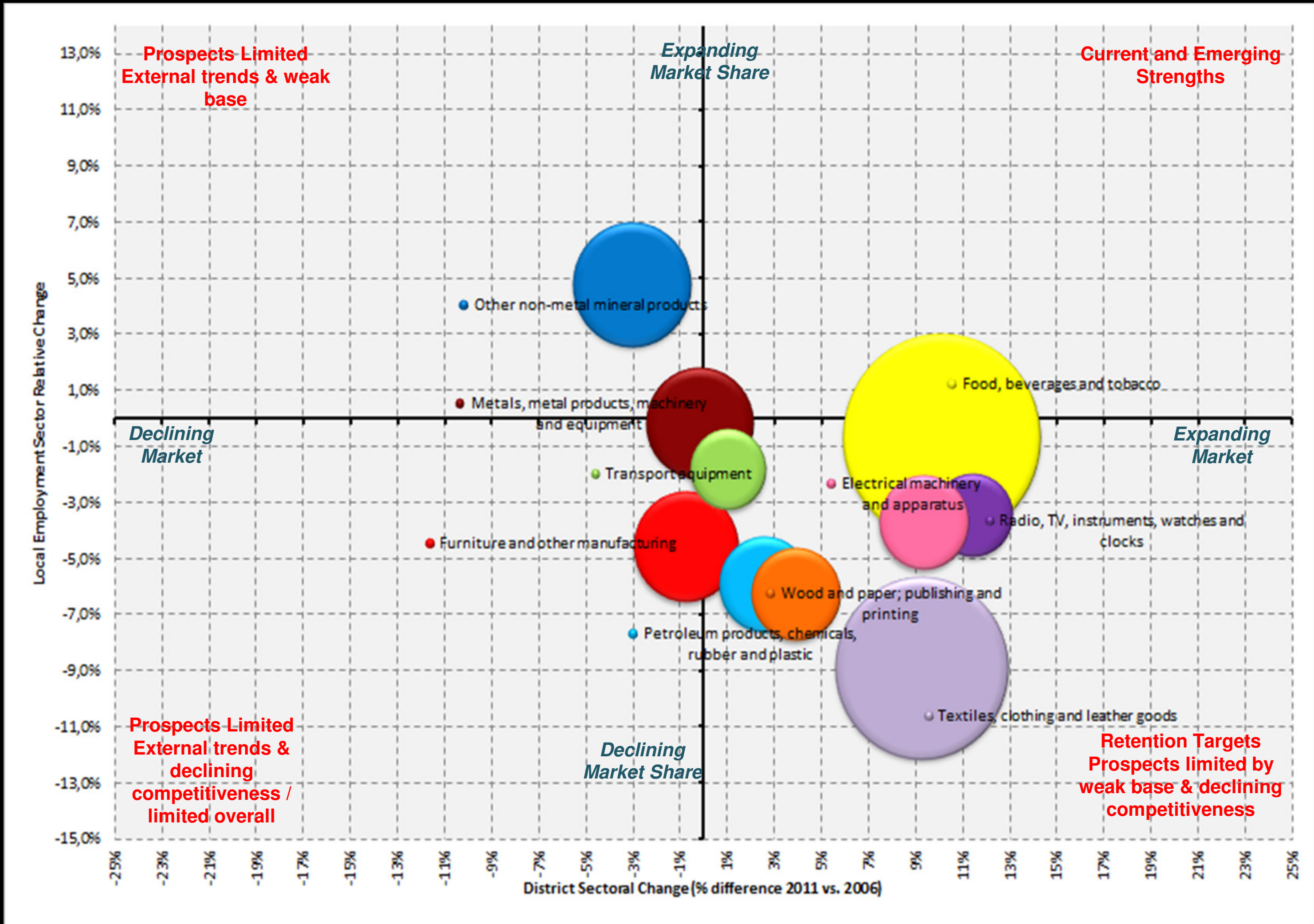
RANDFONTEIN KEY SUB-SECTORS



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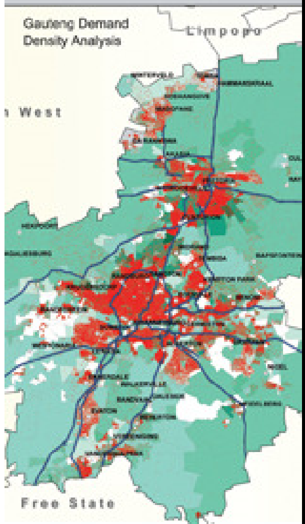

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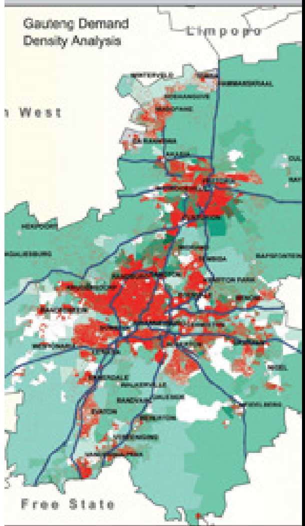
RANDFONTEIN KEY SECTORS AND SUB-SECTORS

	Main Sectors	Sub-sectors
Leading Sectors		
Current and Emerging Strengths *LSRG leading (grow faster than district) and DG positive*	✓ Finance, insurance, real estate and business services ✓ Community, social and personal services ✓ General government services	✓ Business services ✓ Community, social and personal services, other
Prospects limited by external trends and weak base *LSRG leading (grow faster than district) and DG negative*	✓ None	✓ Other non-metal mineral products
Lagging Sectors		
High priority retention target and prospects limited by weak base and declining competitiveness *LSRG lagging (grow slower than district) and DG positive*	✓ Agriculture, forestry and fishing ✓ Manufacturing ✓ Utilities ✓ Construction ✓ Wholesale and retail trade, catering and accommodation ✓ Transport, storage and communication	✓ Food, beverages and tobacco ✓ Textiles, clothing and leather goods ✓ Wood, paper, publishing and printing ✓ Petroleum products, chemicals, rubber and plastic ✓ Electrical machinery and apparatus ✓ Radio, TV, instruments, watches and clocks ✓ Transport equipment ✓ Electricity ✓ Water ✓ Wholesale and retail trade ✓ Catering and accommodation services ✓ Transport and storage ✓ Communication ✓ Finance and insurance
Prospects limited by external trends and declining competitiveness and prospects limited overall *LSRG lagging (grow slower than district) and DG negative*	✓ Mining and quarrying	✓ Metals, metal products, machinery and equipment ✓ Furniture and other manufacturing



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RANDFONTEIN INDUSTRIAL NODES

- Aureus
- Two standalone industries: Tyger Foods & Continental Oil Mills

DEMACON market studies

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RANDFONTEIN – AUREUS INDUSTRIAL NODE

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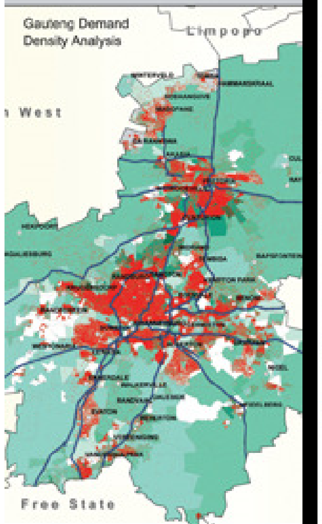

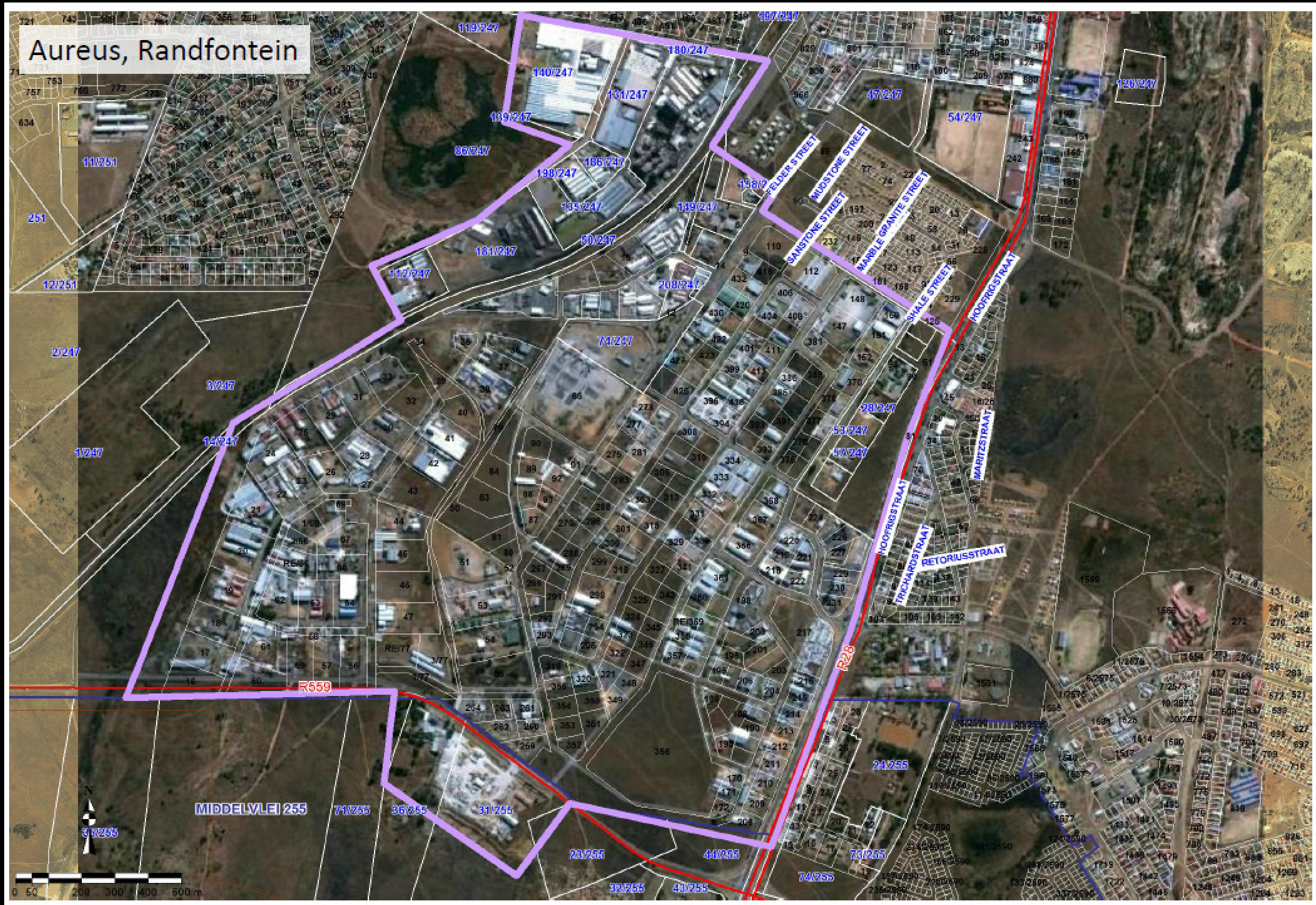

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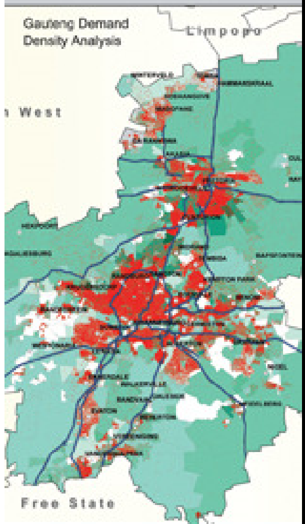

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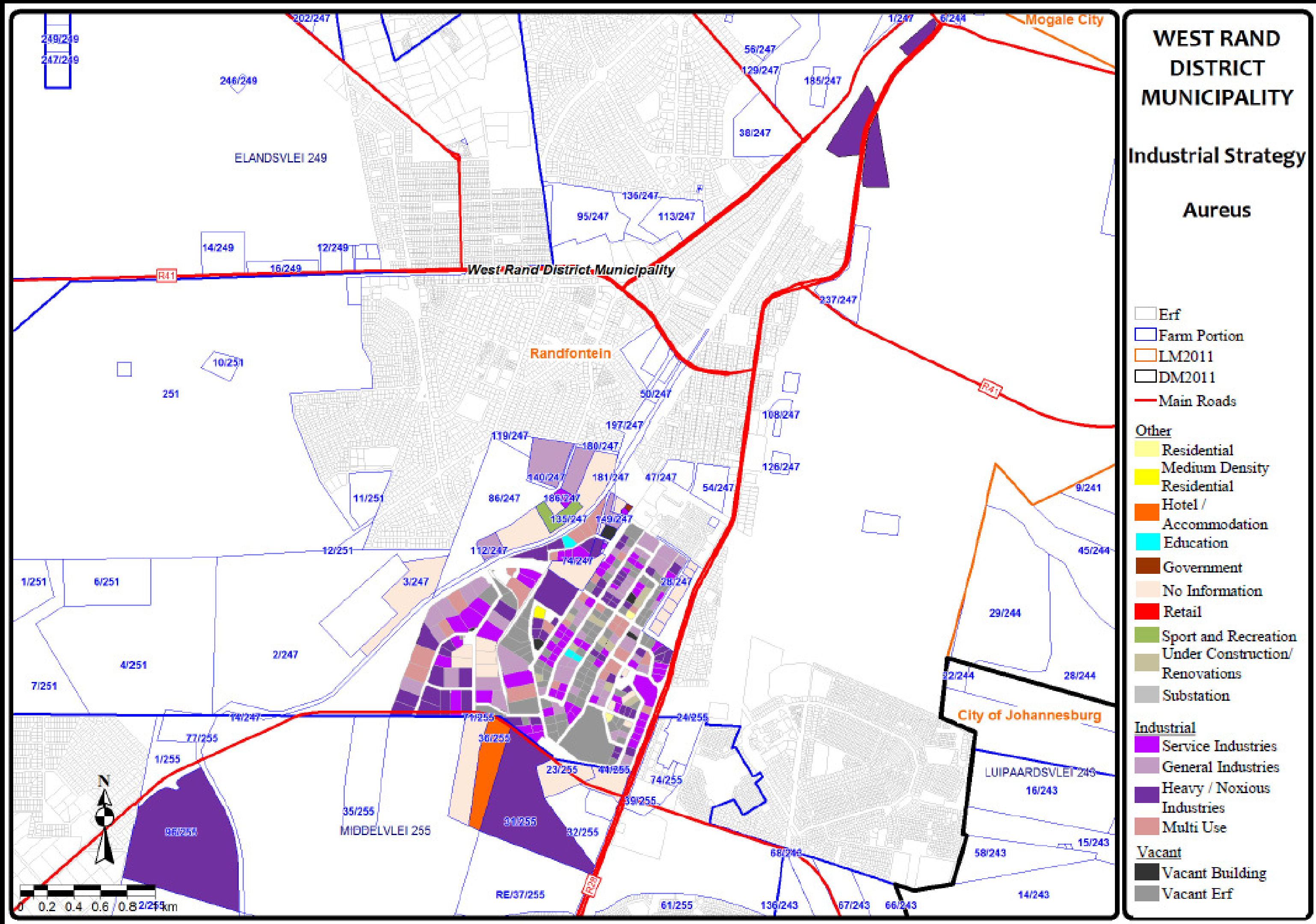

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Real Estate Market Studies

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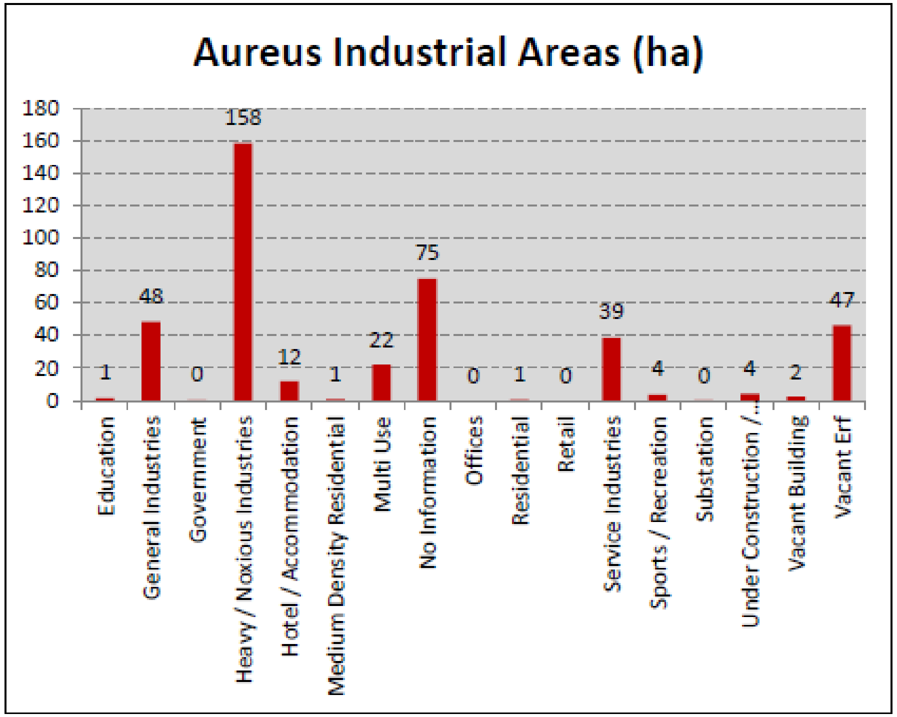
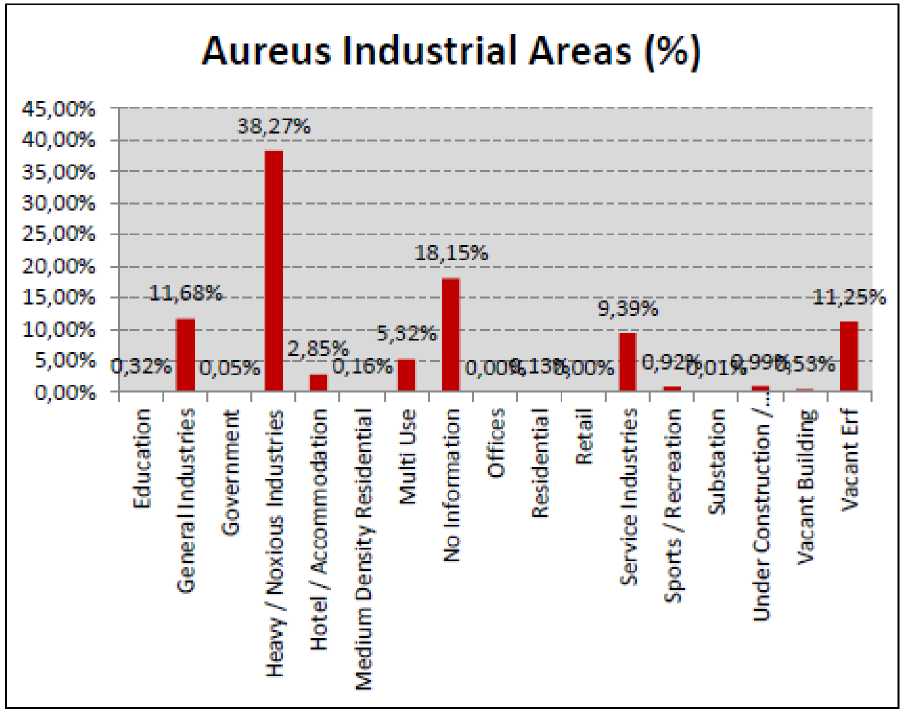
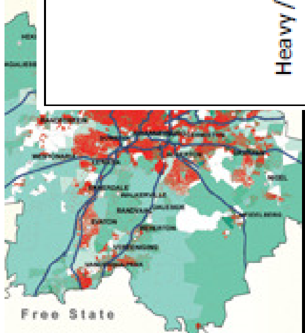


- Main industrial land use:
  - Heavy / noxious industries (158ha / 38%)
  - No information (75ha / 18%).
  - General industries (48ha / 12%)
  - Vacant (47ha / 11%)



- Aureus Total Industrial Area: 414ha



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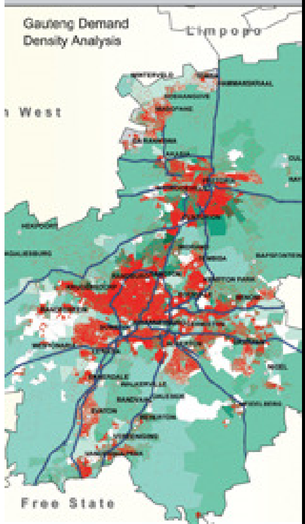

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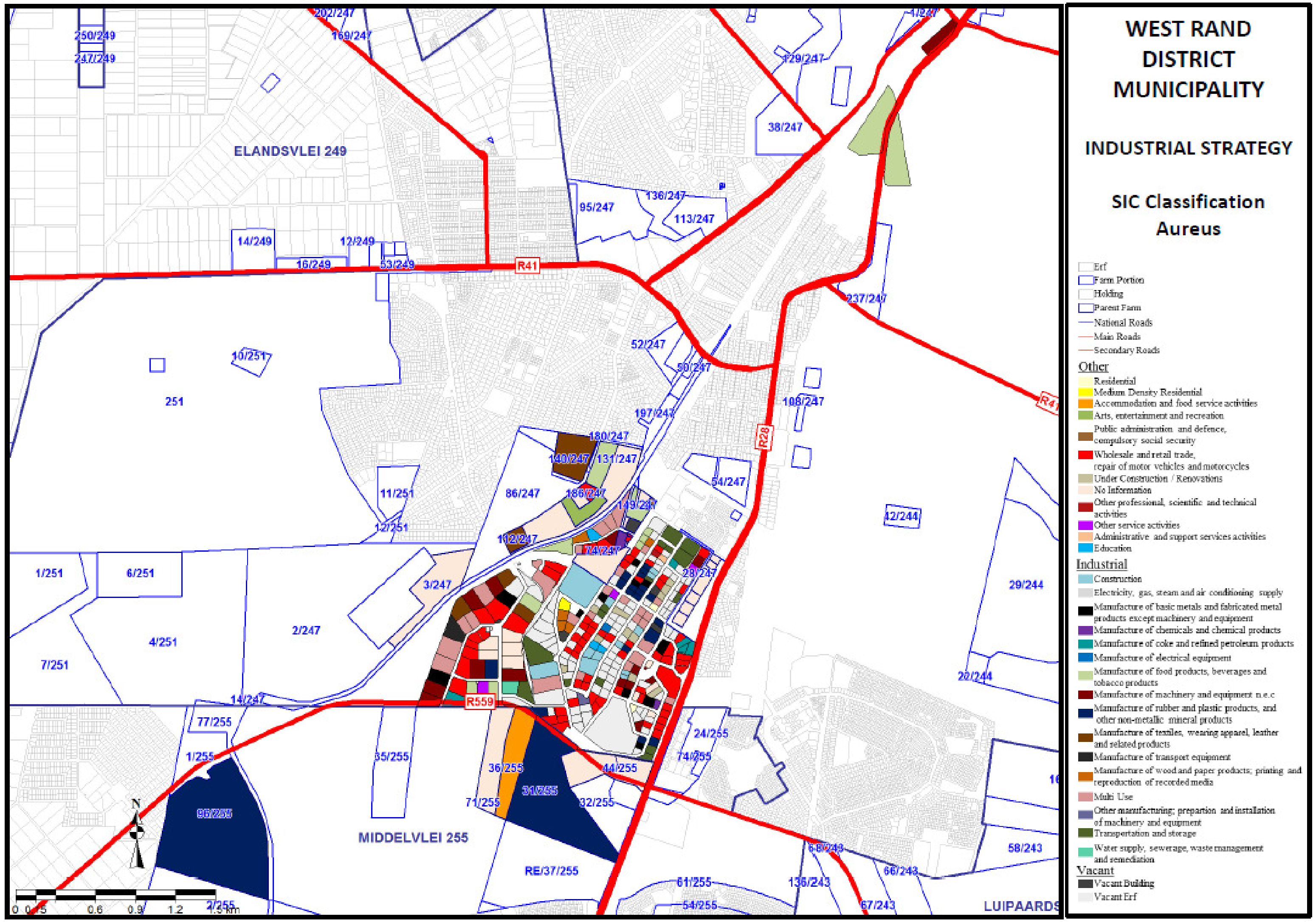
RANDFONTEIN – AUREUS INDUSTRIAL NODE



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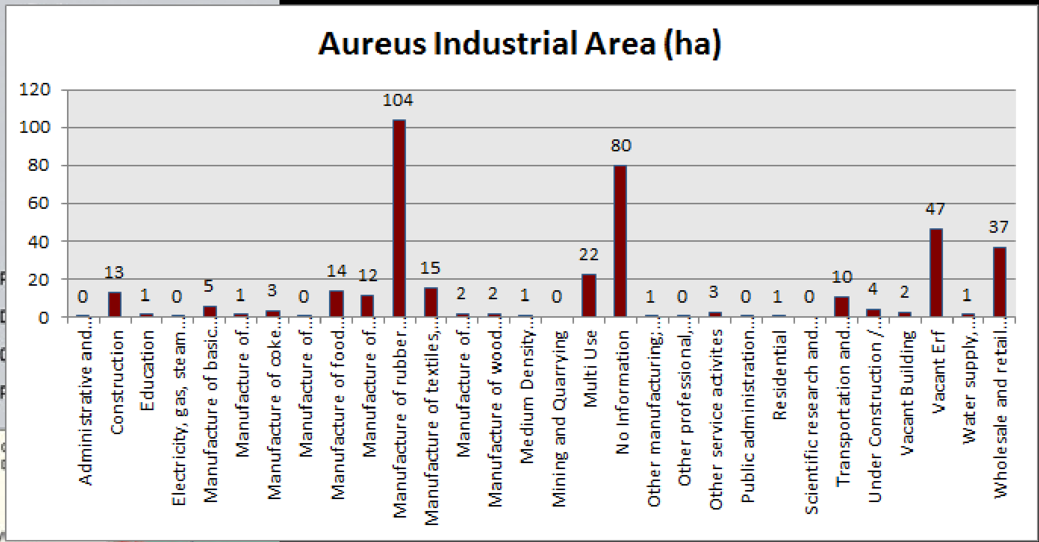
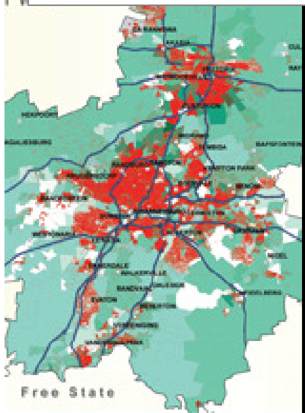
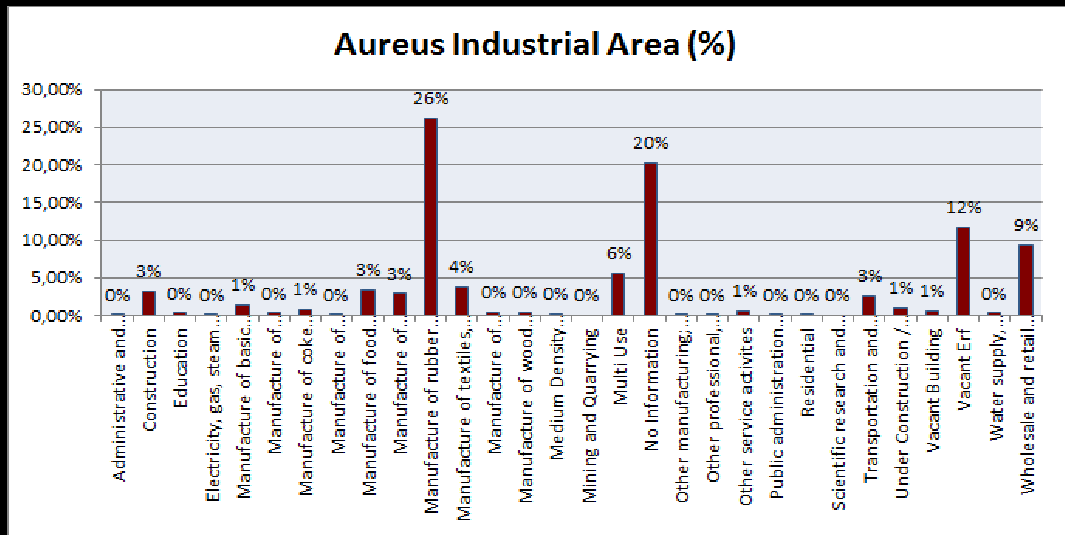
Real Estate Market Studies

RANDFONTEIN – AUREUS INDUSTRIAL NODE



- Main industrial activities:
  - Manufacture of rubber and plastic products, and other non-metallic mineral products (104ha / 26%)
  - No information (80ha / 20%).
  - Vacant (47ha / 12%)
  - Wholesale and retail trade, repair of motor vehicles and motorcycles (37ha / 9%)





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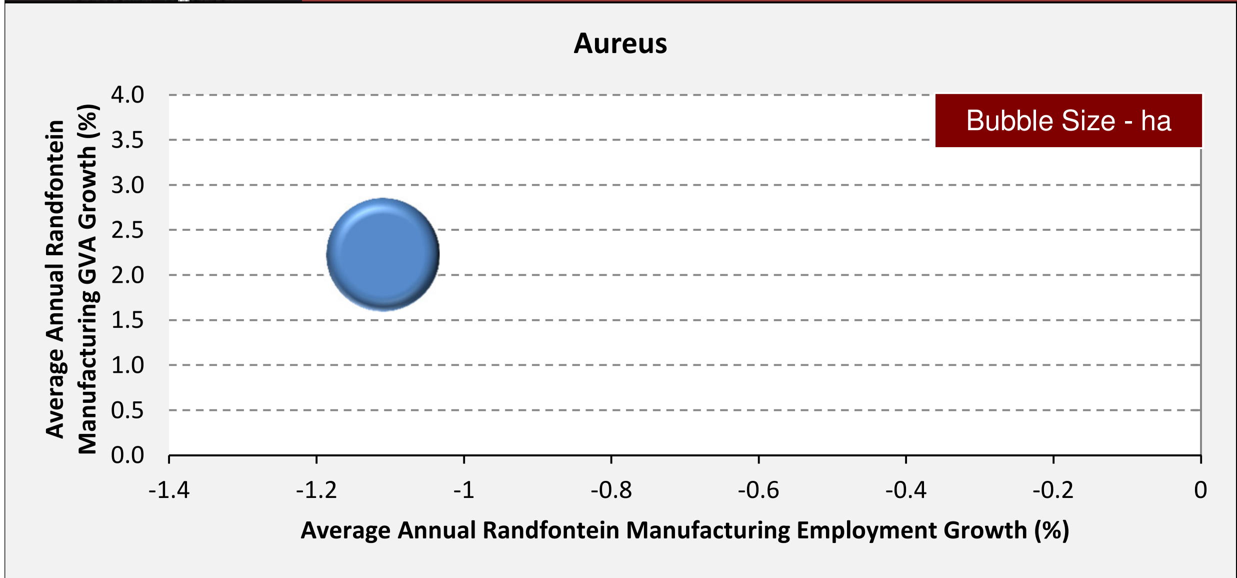
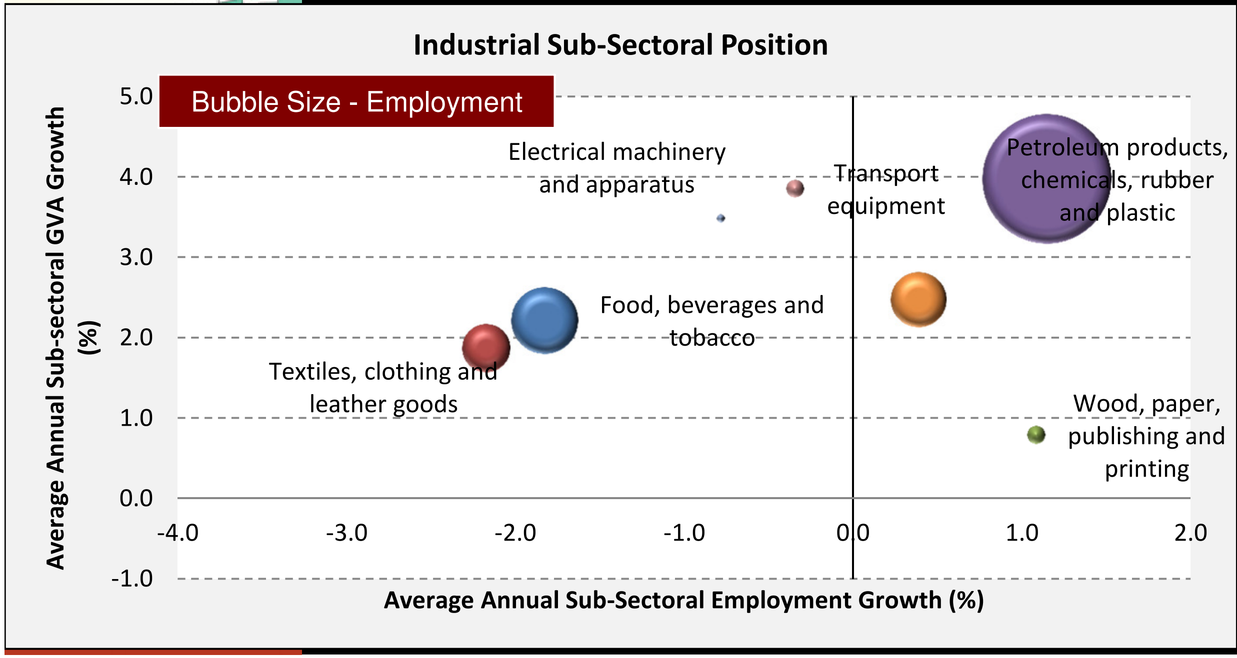
RANDFONTEIN LM





- ❖ Single industrial township in Randfontein
- ❖ 414.05 ha in extent
- ❖ Pure industrial concerns: 42.4%
- ❖ Development opportunity - Vacant erfs: 11.3% (46.6ha)
- ❖ Note: 19.4% of land use could not be identified.

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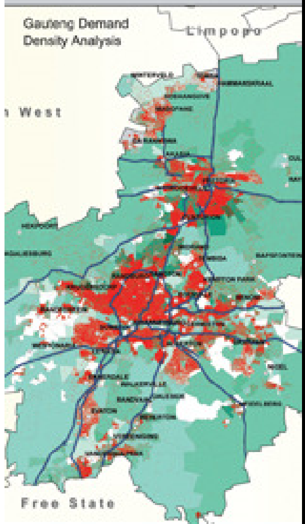

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RANDFONTEIN – AUREUS INDUSTRIAL NODE

- Prominent type of industries:
  - Heavy / Noxious
  - General Industries
  - Service Industries
  - Multi-use
  - Limited non-industrial-related activities.

- Prominent activities:
  - Food processing
  - Manufacturers of rubber and plastic products, and other non-metallic mineral products - Wearne concrete mixers and Lafarge cement respectively
  - Wholesale and retail trade/ auto-repairs
  - Transportation and Storage activities.
  - Construction - Rand Bricks.

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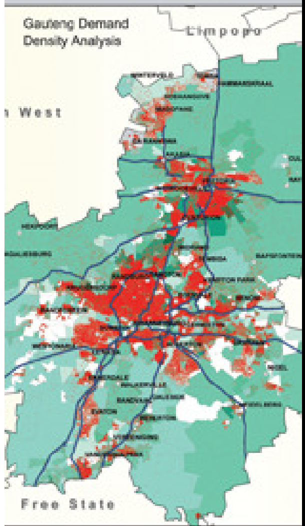

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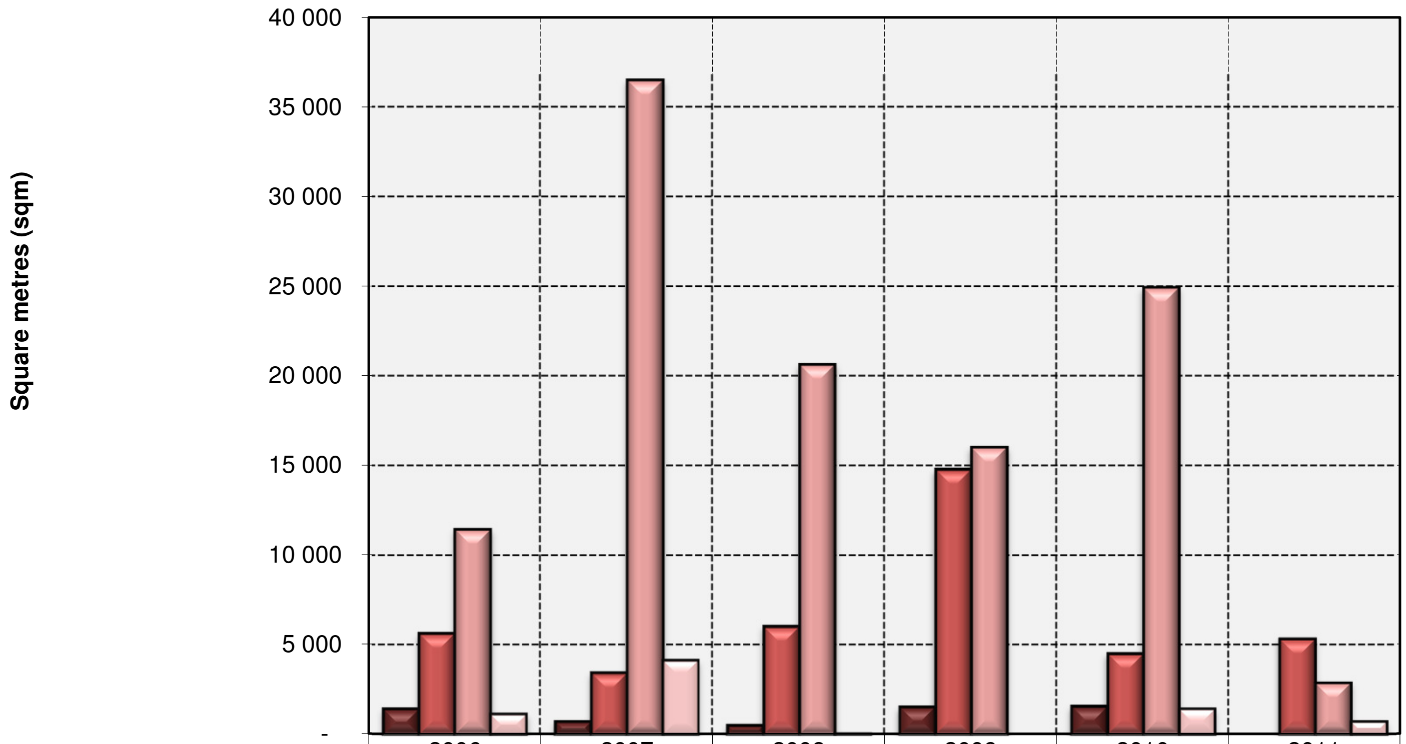
RANDFONTEIN – INDUSTRIAL PLANS PASSED



	2006	2007	2008	2009	2010	2011
Merafong	1 412	722	508	1 516	1 560	-
Mogale City	5 632	3 432	6 030	14 782	4 516	5 325
Randfontein	11 433	36 479	20 643	16 016	24 923	2 877
Westonaria	1 125	4 123	52	-	1 420	720

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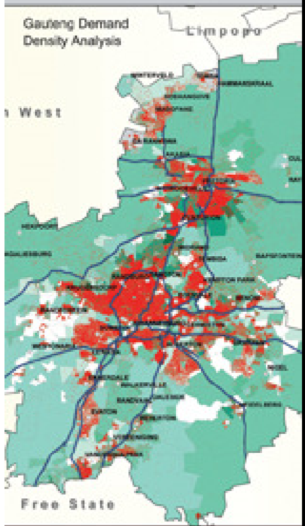

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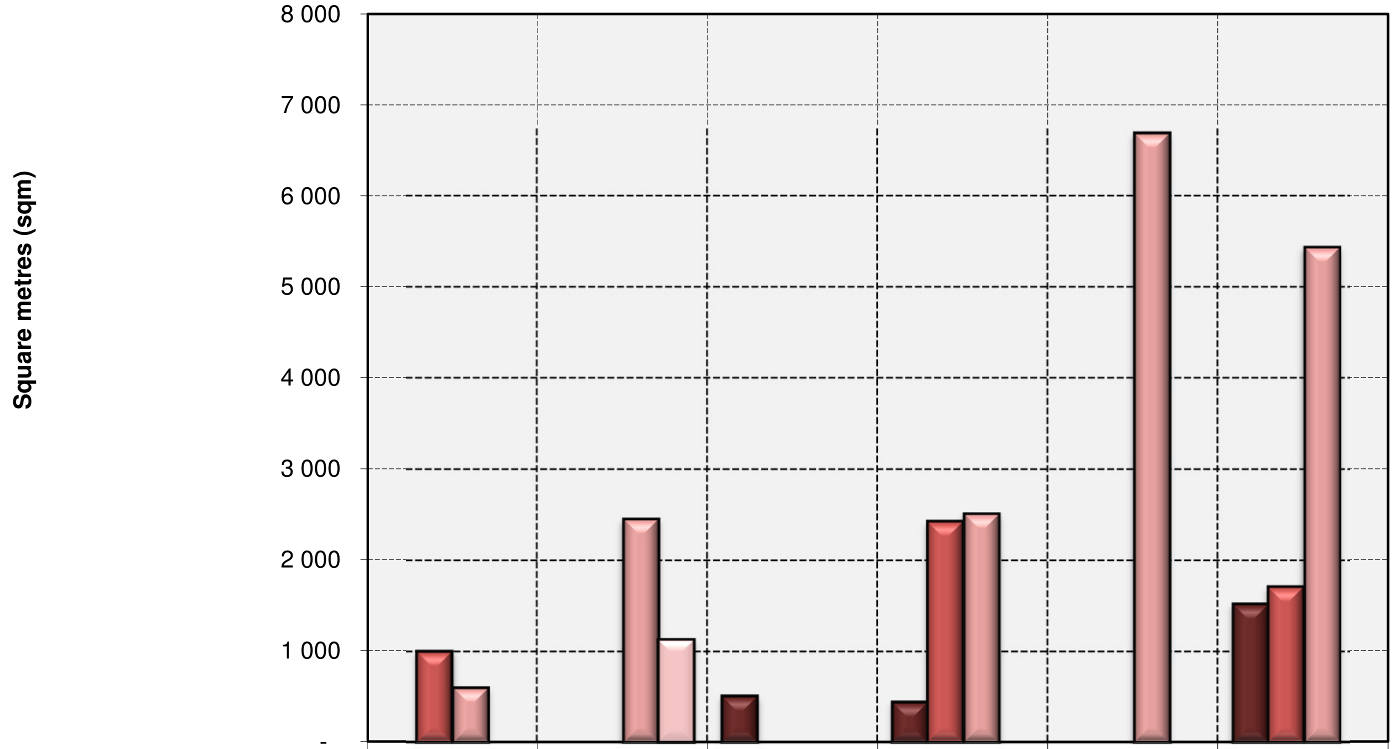
RANDFONTEIN – INDUSTRIAL PLANS PASSED

Industrial and Warehouse Plans Completed (West Rand District Munisipality)



	2006	2007	2008	2009	2010	2011
Merafong	-	-	508	442	-	1 516
Mogale City	998	-	-	2 426	-	1 706
Randfontein	600	2 451	-	2 508	6 688	5 435
Westonaria	-	1 125	-	-	-	-

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Real Estate Market Studies

RANDFONTEIN – AN STRONGLY EMERGING INDUSTRIAL DEVELOPMENT OPPORTUNITY

1. Growing demand for quality industrial floor space in the area – highest level of industrial building activity over past few years (2003 vs. 2012).
2. Increased development opportunities related to warehousing and logistics.
3. Aureus – opportunity to develop into secure industrial park with access control.
4. Industrial opportunity – reflects high potential for R28 / N12 corridor area.

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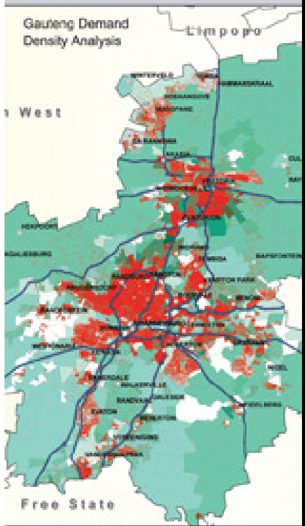

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RANDFONTEIN – AUREUS INDUSTRIAL NODE

Strengths

The industrial area is easily accessible as it is located along a major movement spine – R28

- Popular & continued strong demand for space.

Weaknesses

- The industrial area borders residential and related developments to the north and east.

- Weak brand & general image

Opportunities

- Still some developable stands vacant.
- Expansion capacity to the south.
- Significant branding opportrunities.
- Opportunity to secure the estate & increase its popularity even further.
- Bonded housing opportunities adjacent.

Threats

- Rapid low cost residential expansion could detract from area appeal – should be managed carefully.

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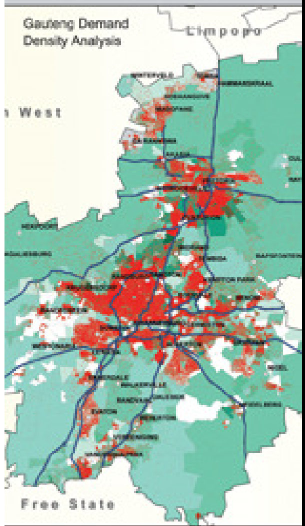

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MERAFONG CITY LOCAL MUNICIPALITY

- Merafong Industrial Sector and Sub-Sector Competitiveness Analysis
- Nodal Analysis

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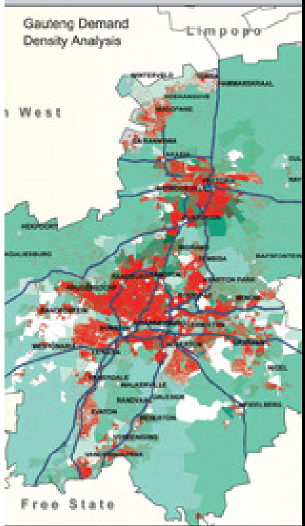

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MERAFONG CITY LM – OVERVIEW

- Merafong's historical development is closely knit with the discovery of **rich gold reefs** in the early nineteen thirties.
- The three towns of *Carletonville, Fochville and Wedela* each developed as individual entities with their own characteristics.
- *Fochville* is the oldest unit, established by two residents, Messer's Wulfson and Horvitch and was declared a town in 1951.
- A mine engineer from a gold mining company Gold Fields, Guy Carleton Jones, played a prominent role in the discovery of the so-called West Wits line Gold Reef, of which *Carletonville* forms part. The town Carletonville was named after him.
- As a result of the strategic location and already developed Oberholzer district, the Gold Fields Mine Group decided in November 1946 to establish a town.
- Carletonville was proclaimed in 1948 and attained Town Council Status on 1 July 1959.

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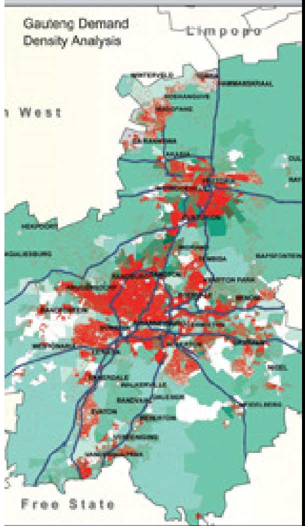

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MERAFONG CITY LM – OVERVIEW

- Wedela was established as a mining village, many years later in December 1978, by Mr. Harry Oppenheimer. The town is situated between Western Deep Levels and Elandsrand Gold Mine.
- The town's name is derived from the prefixes of the two mines, namely the Wed of Western Deep Levels and the -ela of Elandsrand.
- Municipal status was granted to Wedela on 1 January 1990. Attached to Fochville and Carletonville are also the towns of Khutsong, Kokosi and Greenspark, Welverdiend, and Blybank

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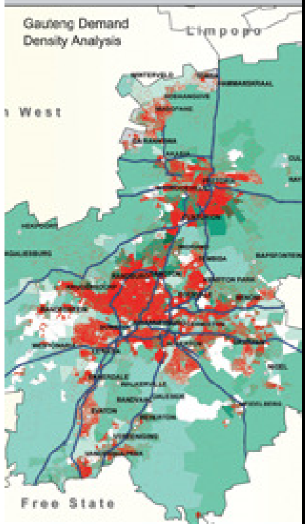

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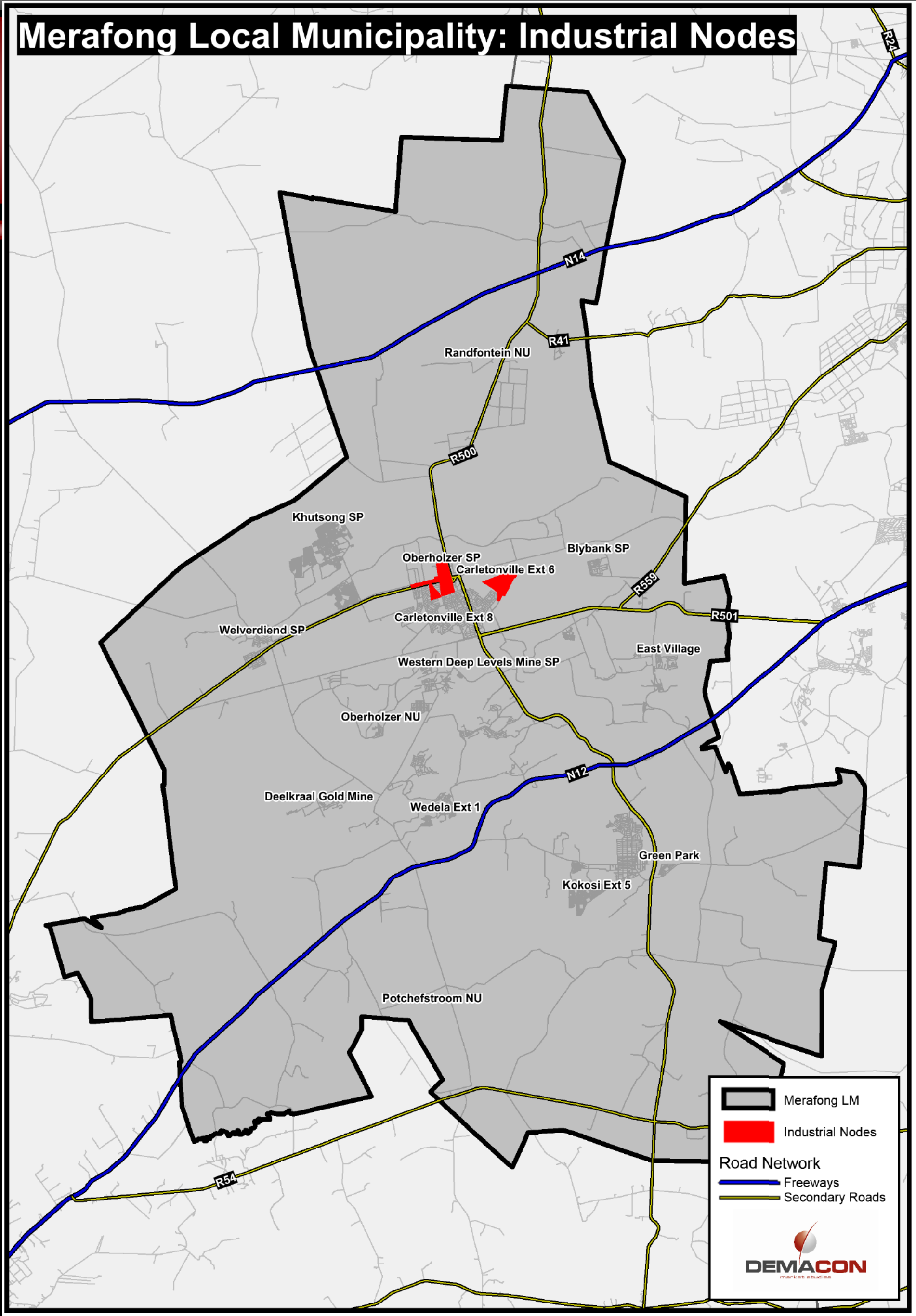
MERAFONG CITY INDUSTRIAL NODES



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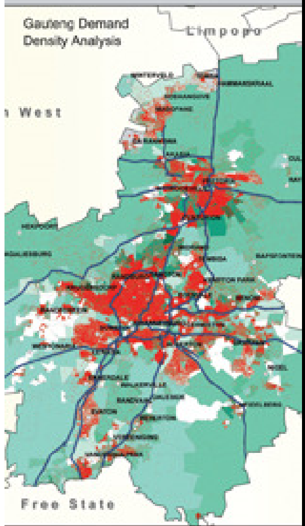

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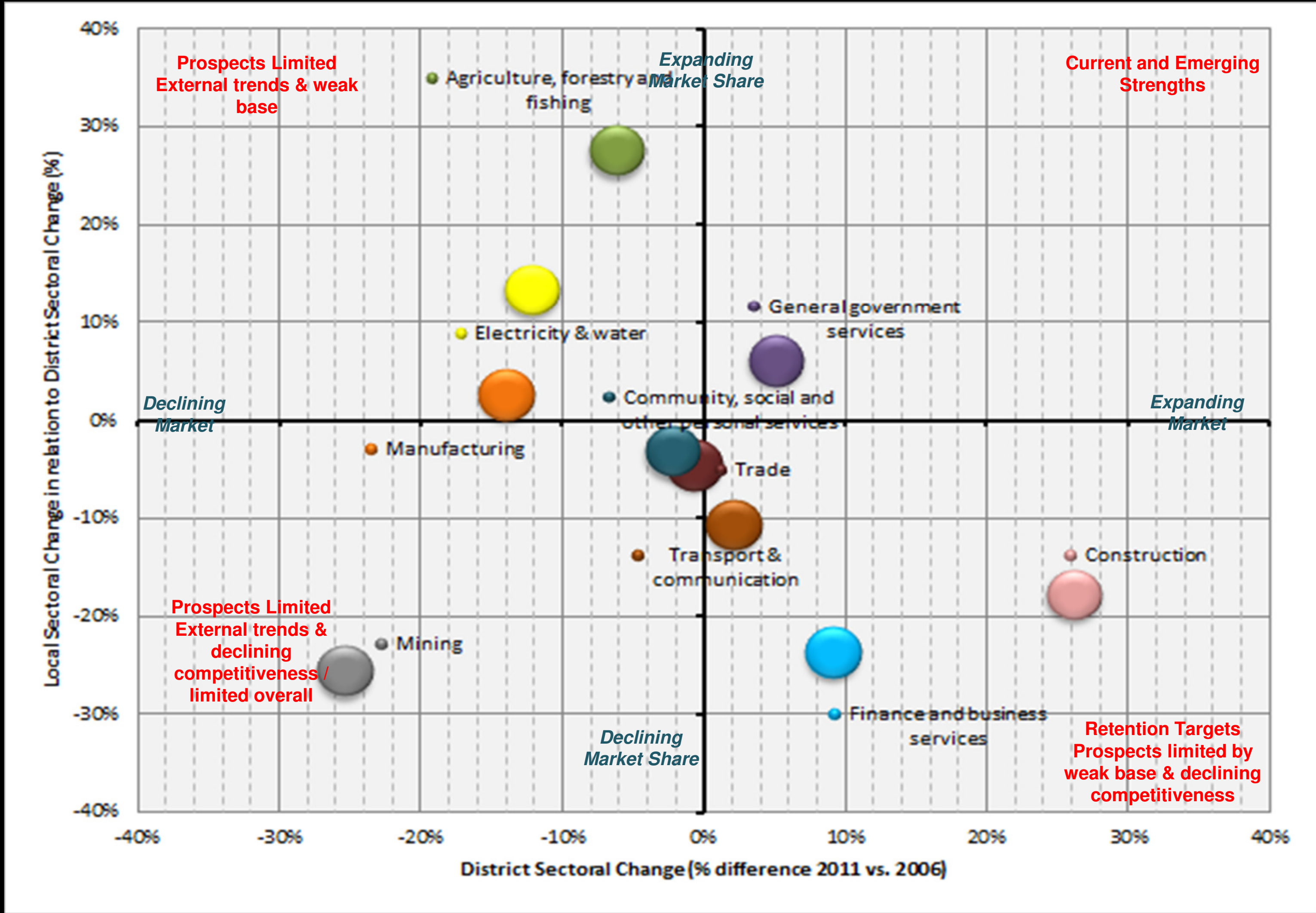
MERAFONG CITY KEY SECTORS



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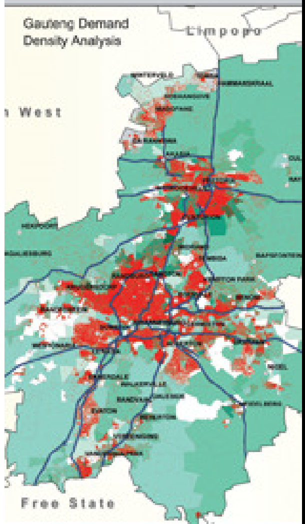

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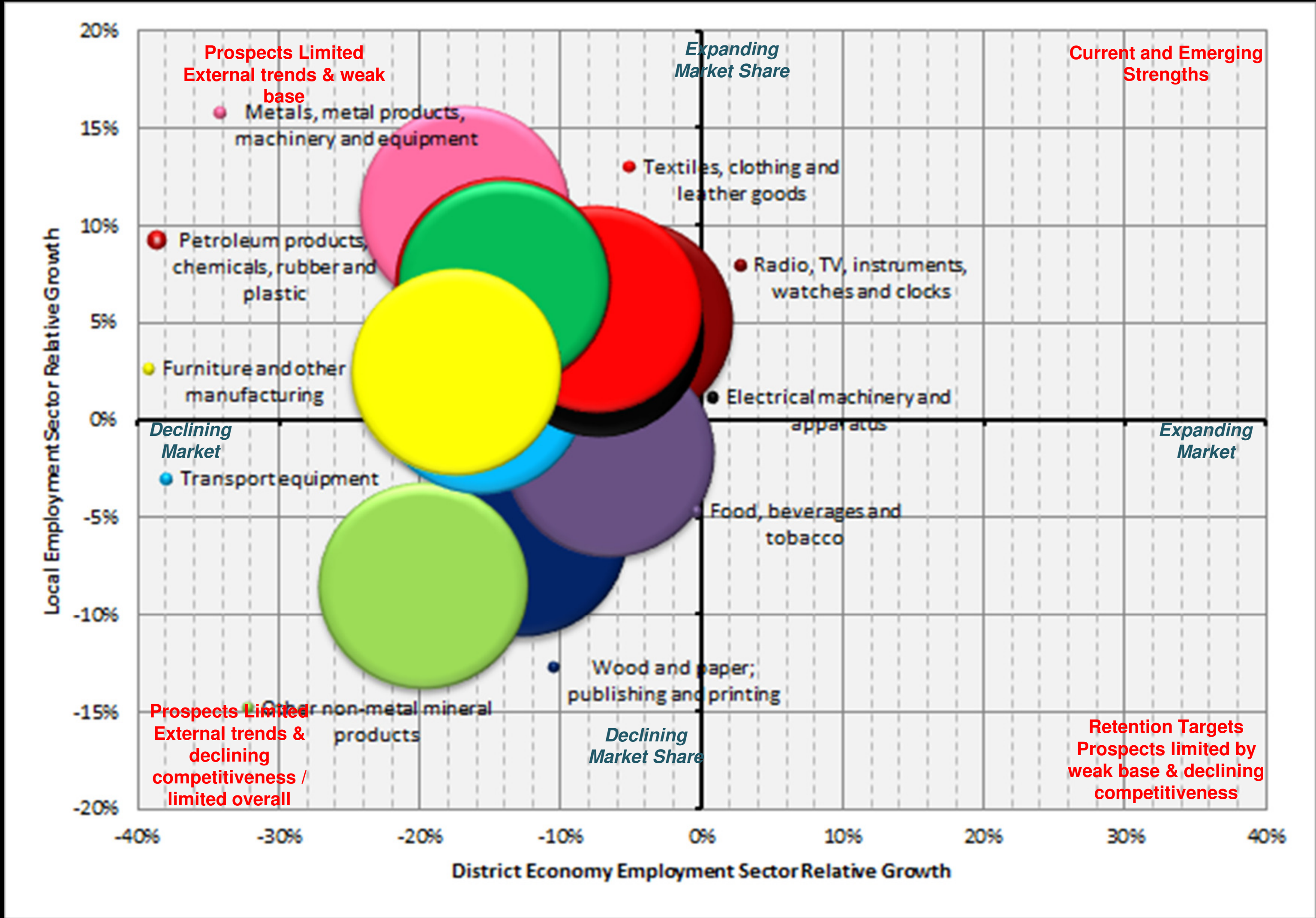
MERAFONG CITY KEY SUB-SECTORS



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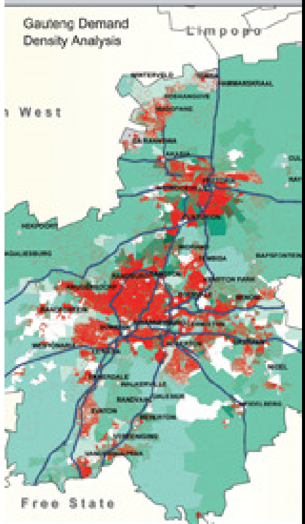

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MERAFONG CITY KEY SECTORS AND SUB-SECTORS

	Main Sectors	Sub-sectors
Leading Sectors		
Current and Emerging Strengths *LSRG leading (grow faster than district) and DG positive*	✓ Agriculture, forestry and fishing ✓ Manufacturing ✓ Utilities ✓ General government services	✓ Textiles, clothing and leather goods ✓ Petroleum products, chemicals, rubber and plastic ✓ Electrical machinery and apparatus ✓ Radio, TV, instruments, watches and clocks ✓ Transport equipment ✓ Electricity ✓ Water
Prospects limited by external trends and weak base *LSRG leading (grow faster than district) and DG negative*	✓ None	✓ Metals, metal products, machinery and equipment ✓ Furniture and other manufacturing
Lagging Sectors		
High priority retention target and prospects limited by weak base and declining competitiveness *LSRG lagging (grow slower than district) and DG positive*	✓ Construction ✓ Wholesale and retail trade, catering and accommodation ✓ Transport, storage and communication ✓ Finance, insurance, real estate and business services ✓ Community, social and personal services	✓ Wholesale and retail trade ✓ Catering and accommodation services ✓ Transport and storage ✓ Communication ✓ Finance and insurance ✓ Business services ✓ Community, social and personal services, other
Prospects limited by external trends and declining competitiveness and prospects limited overall *LSRG lagging (grow slower than district) and DG negative*	✓ Mining and quarrying	✓ Food, beverages and tobacco ✓ Wood, paper, publishing and printing ✓ Other non-metal mineral products

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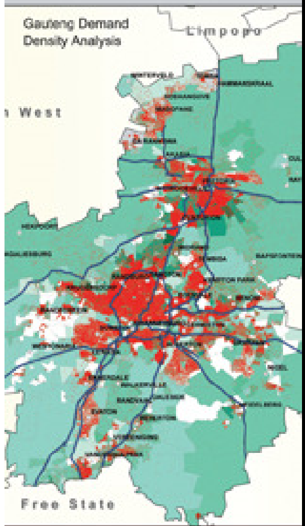

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MERAFONG CITY INDUSTRIAL NODES

- **Carletonville Extension 6**
- Oberholzer

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MERAFONG CITY - CARLETONVILLE INDUSTRIAL NODE

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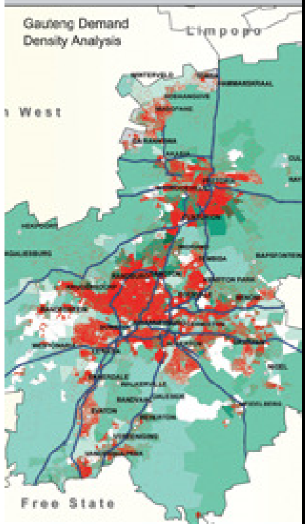

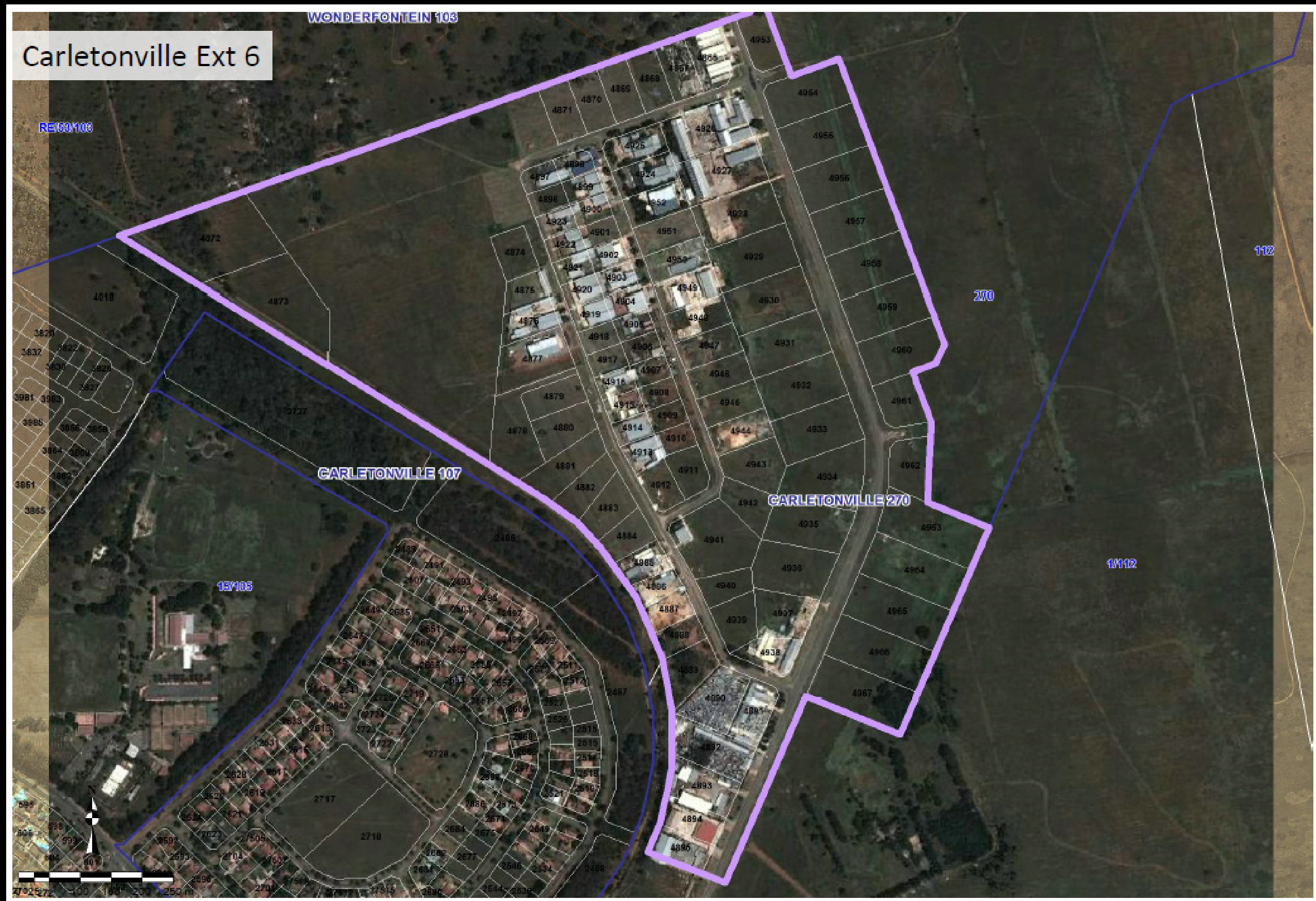

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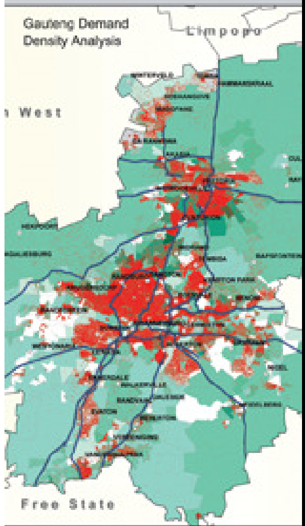

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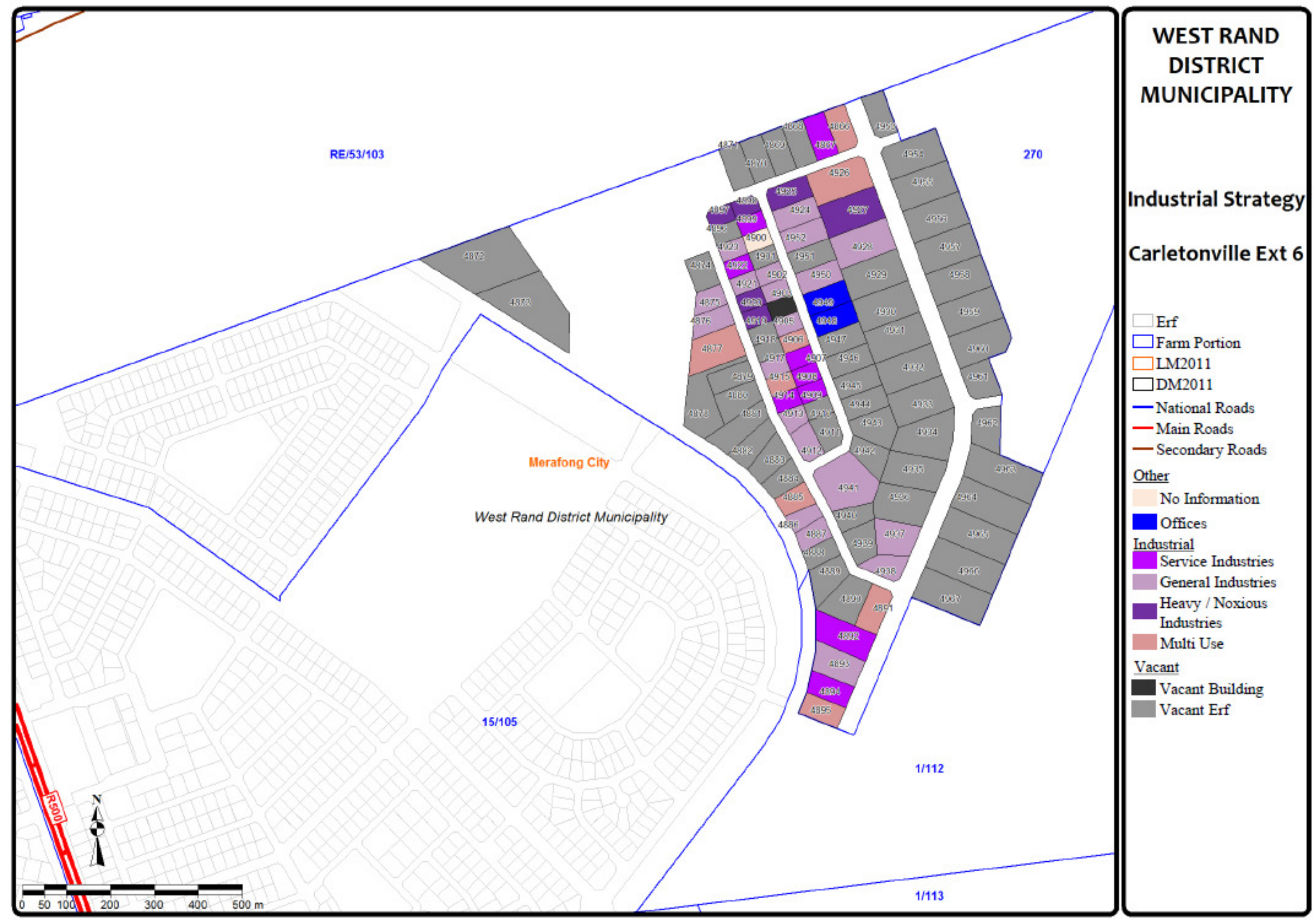
MERAFONG CITY - CARLETONVILLE INDUSTRIAL NODE



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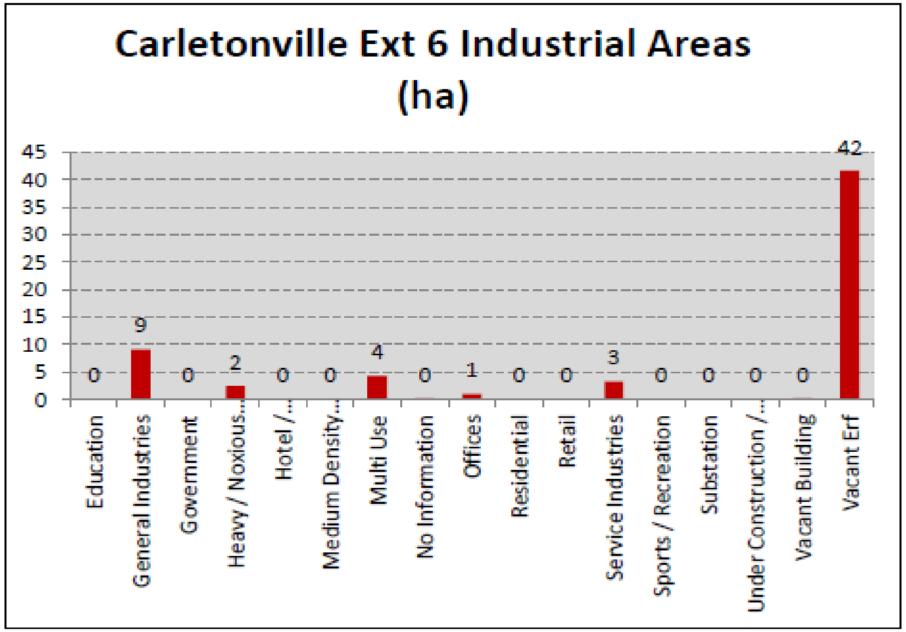
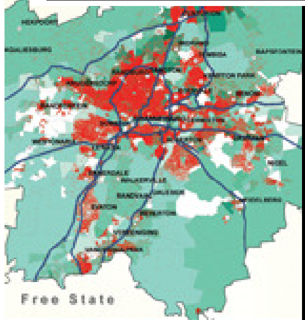
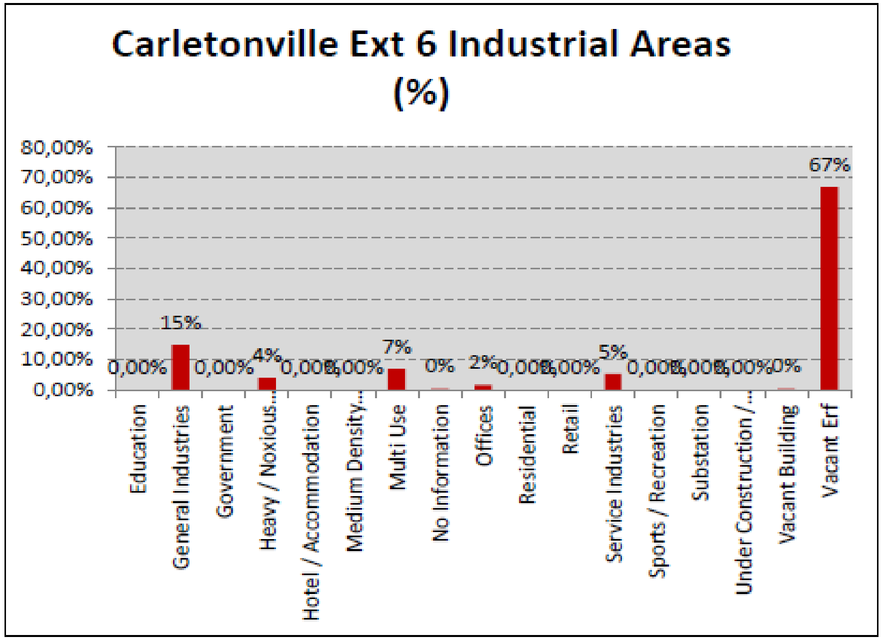


- Main industrial land use:
  - Vacant (42 ha / 67%)
  - General industries (9ha / 15%)
  - Multi-use (4ha / 7%)
  - Service industries (3ha / 5%)



- Carletonville Total Industrial Area: 62ha



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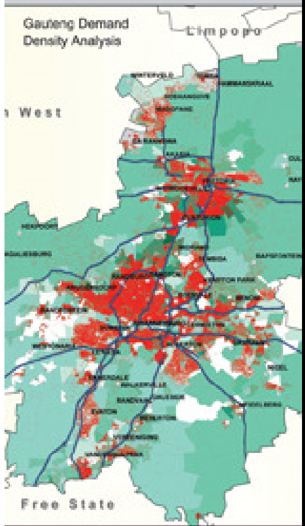

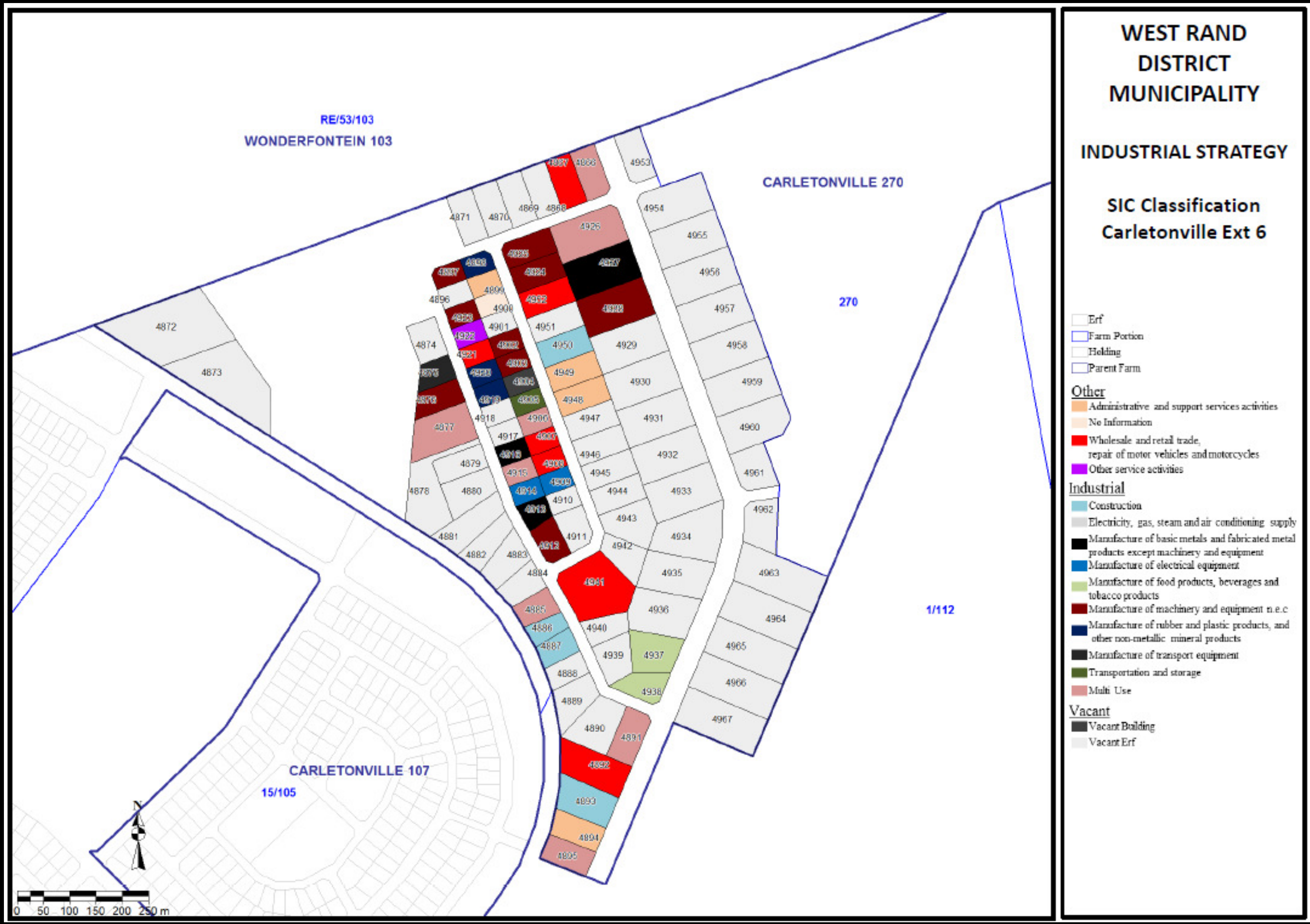

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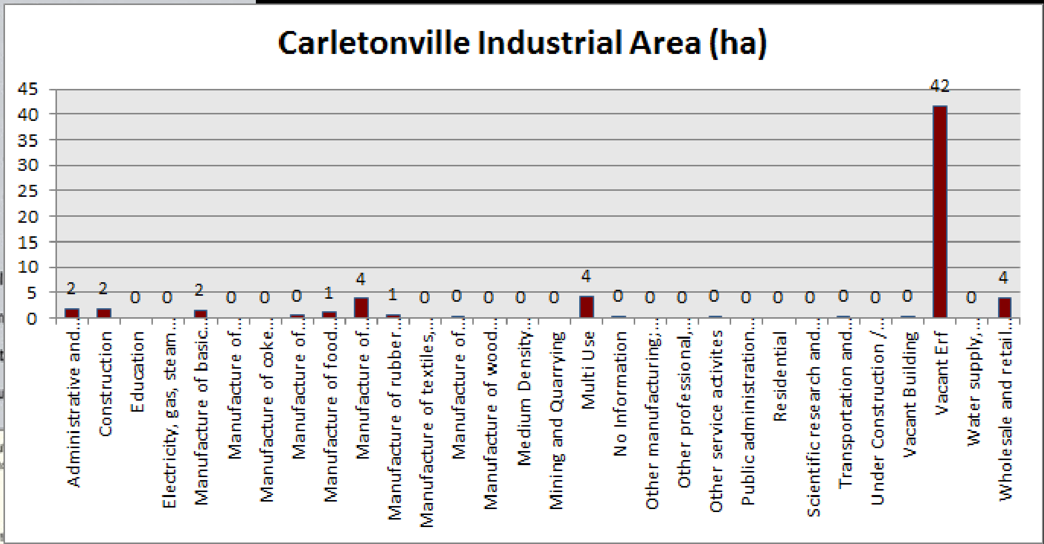
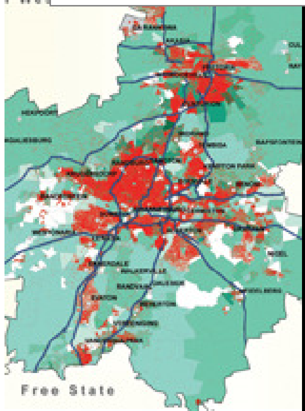
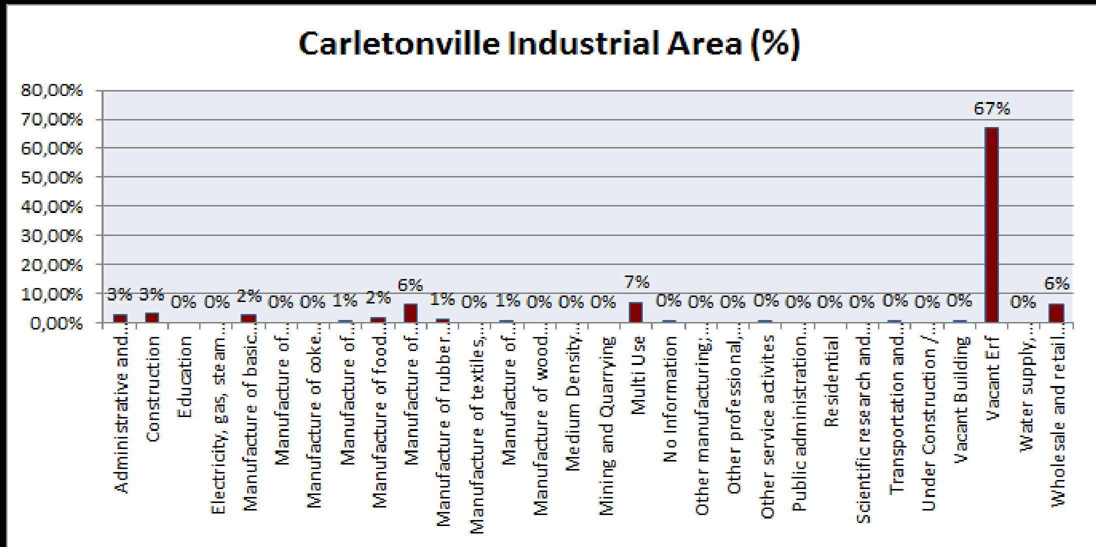


- Main industrial activities:
  - Vacant (42 ha / 67%)
  - Multi-use (4ha / 7%)
  - Manufacture of machinery and equipment n.e.c (4ha / 6%)
  - Wholesale and retail trade, repair of motor vehicles and motorcycles (4ha / 6%)





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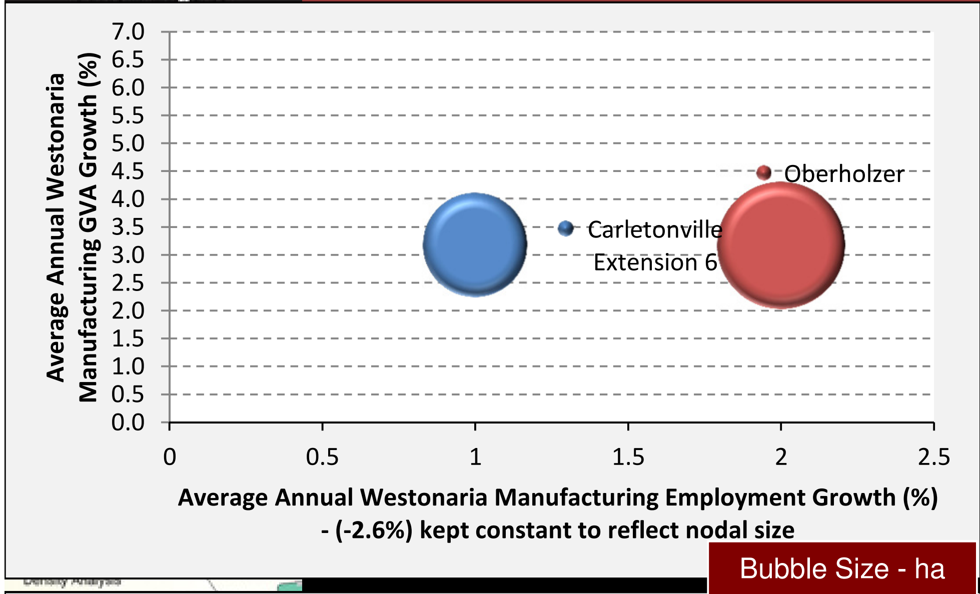
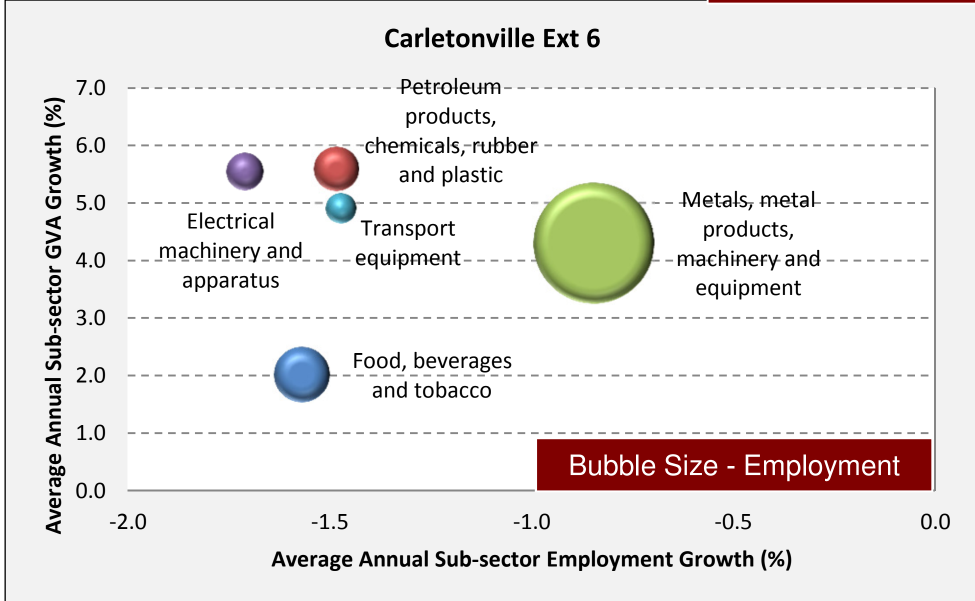
MERAFONG CITY LM – CARLETONVILLE EXT 6





- Carletonville represents the smaller of the two industrial nodes in Merafong City
- 62.33 ha in extent
- Pure industrial concerns: 12.8%
- Development opportunity - Vacant erfs: 66.8% (41.7ha).

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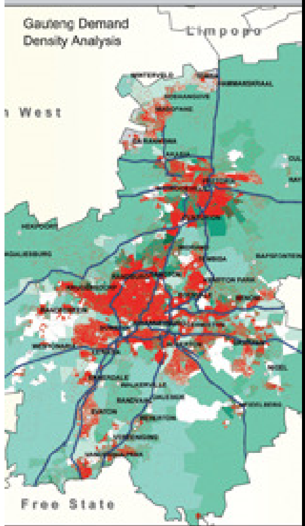
Refurbishment & Remerchandising studies



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MERAFONG CITY - CARLETONVILLE INDUSTRIAL NODE

- Prominent type of industries:
  - General industries
  - Multi-use
  - Service industries.

- Prominent activities:
  - Manufacture / servicing of machinery and equipment
  - Wholesale / auto repairs
  - Construction.

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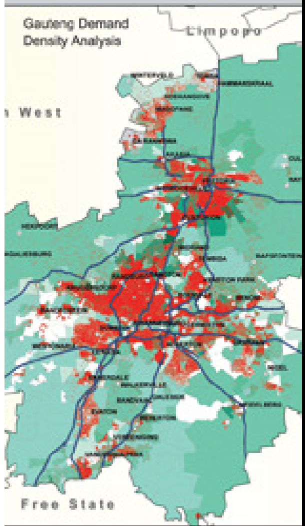

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MERAFONG CITY - CARLETONVILLE INDUSTRIAL NODE

<u>Strengths</u>

- Near established mining town & demand for mining related service industries
- Lifespan of mine until at least 2050

<u>Weaknesses</u>

- Limited sight value and exposure

<u>Opportunities</u>

- Numerous vacant erven still available in Carletonville Ext 6.
- The surrounding area (to the east) allows for future expansion.
- Mining related SMME development opportunities, industrial hives, etc.

<u>Threats</u>

- Mining labour force volatility.
- Gold price volatility (boom and bust tendency).

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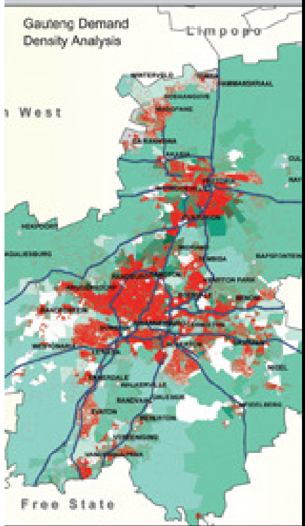

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MERAFONG CITY INDUSTRIAL NODES

- Carletonville Extension 6
- **Oberholzer**

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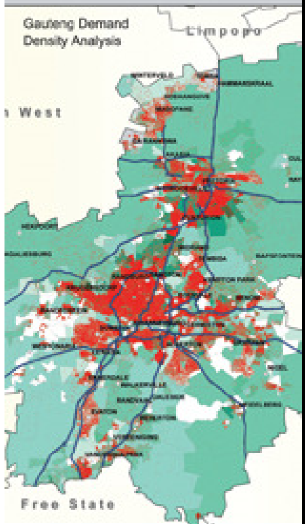

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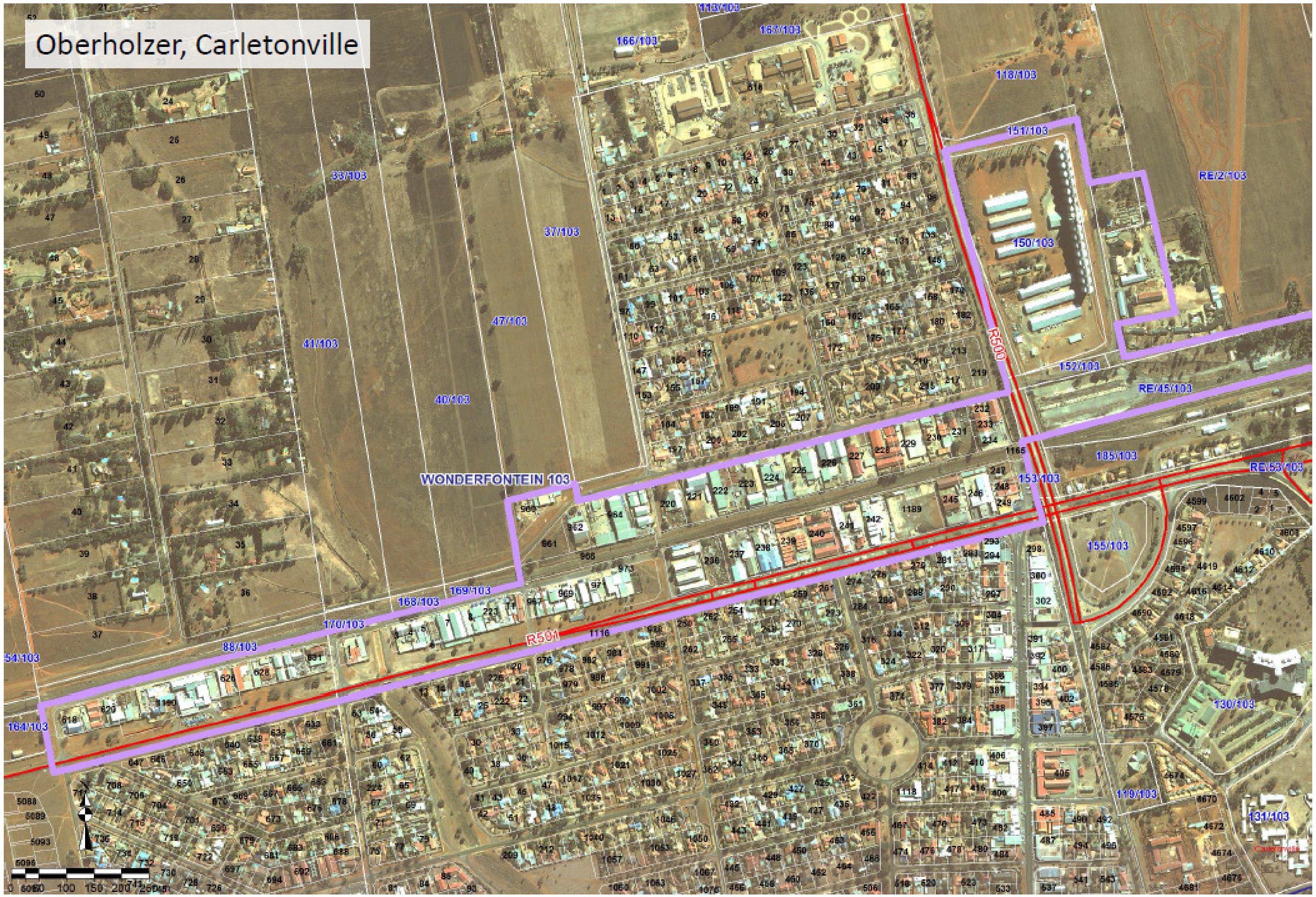
MERAFONG CITY - OBERHOLZER INDUSTRIAL NODE



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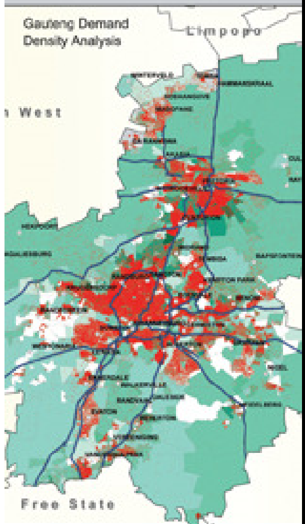

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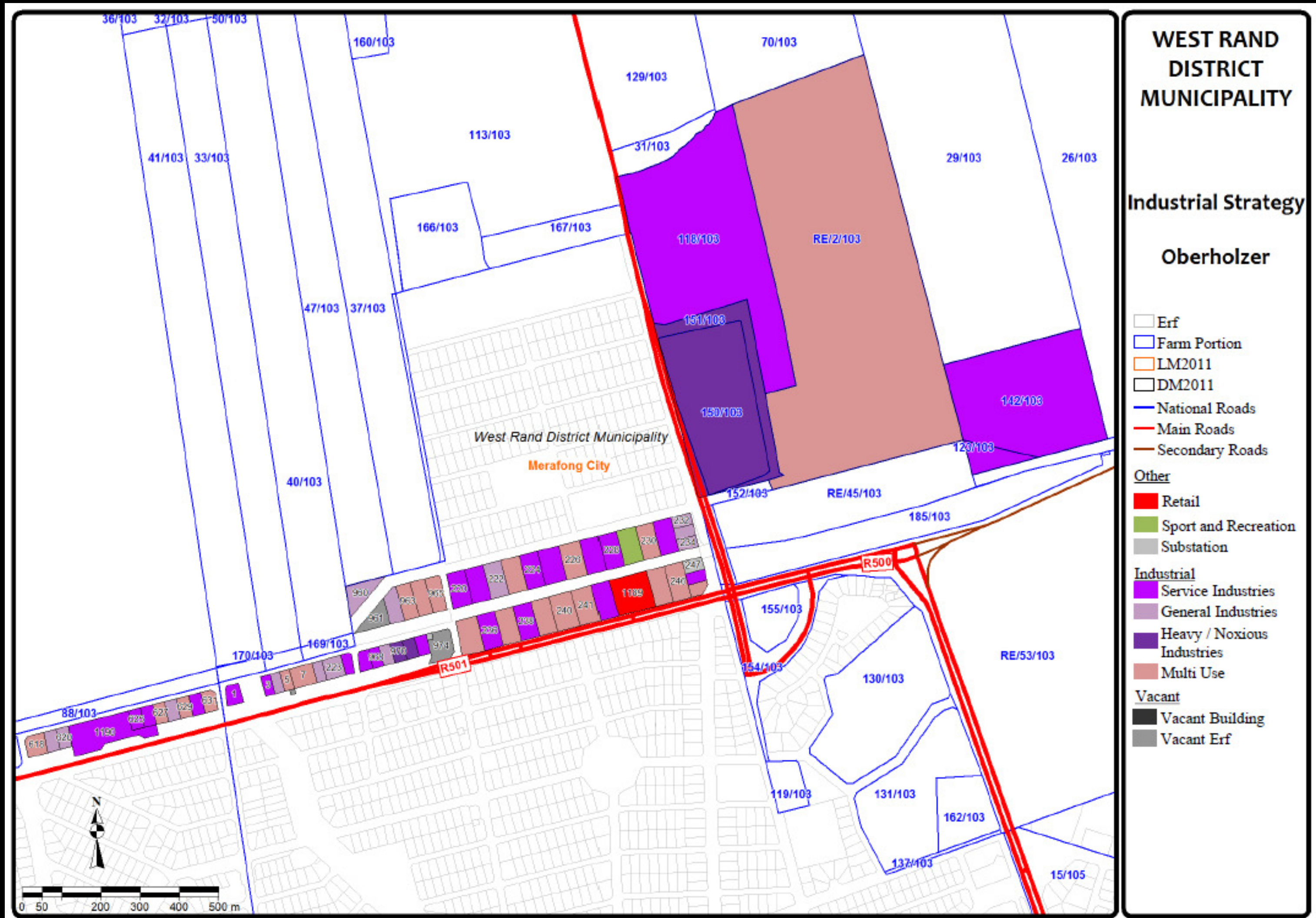

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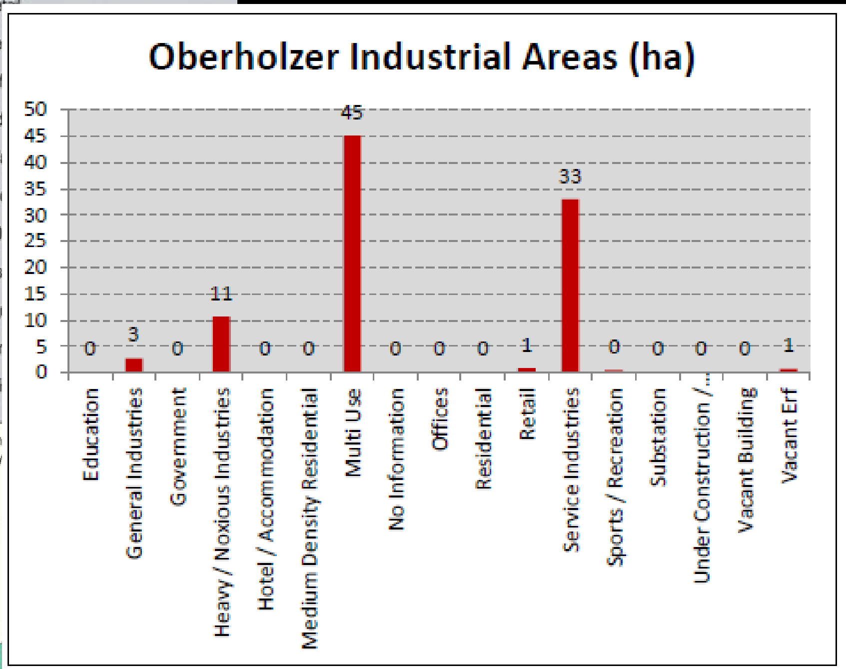
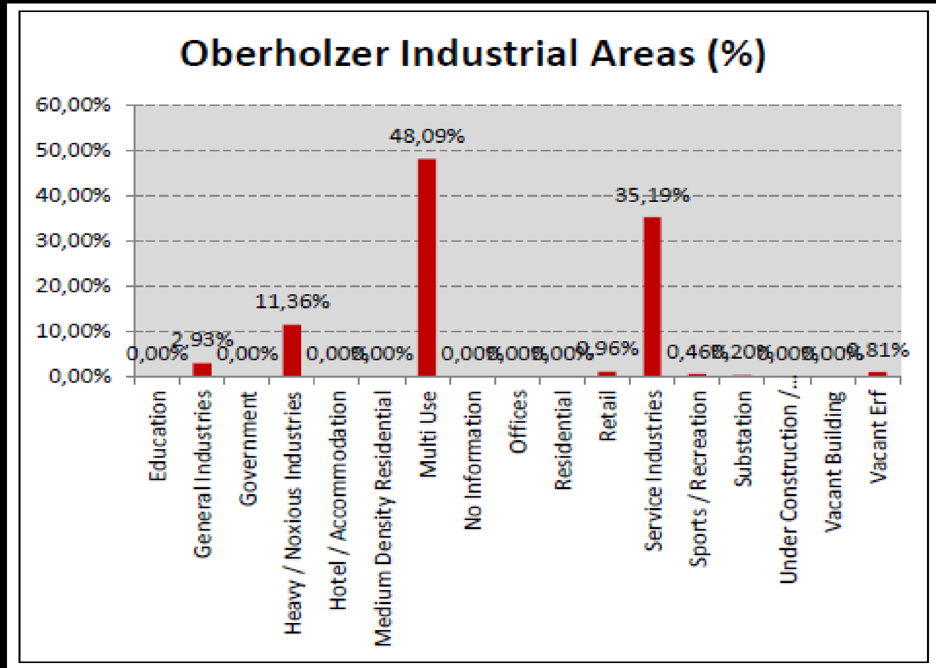
Real Estate Market Studies

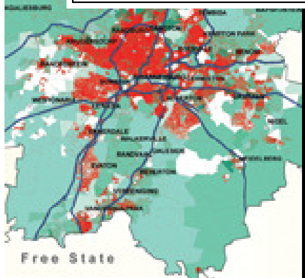
MERAFONG CITY - OBERHOLZER INDUSTRIAL NODE



- Main industrial land use:
  - Multi-use (45 ha / 48%)
  - Service industries (33ha / 35%)
  - Heavy / Noxious industries (11ha / 11%)
  - General industries (3ha / 3%)



- Oberholzer Total Industrial Area: 94ha



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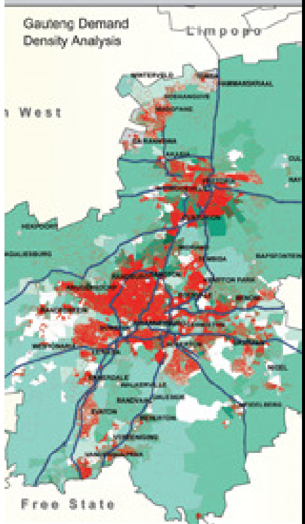

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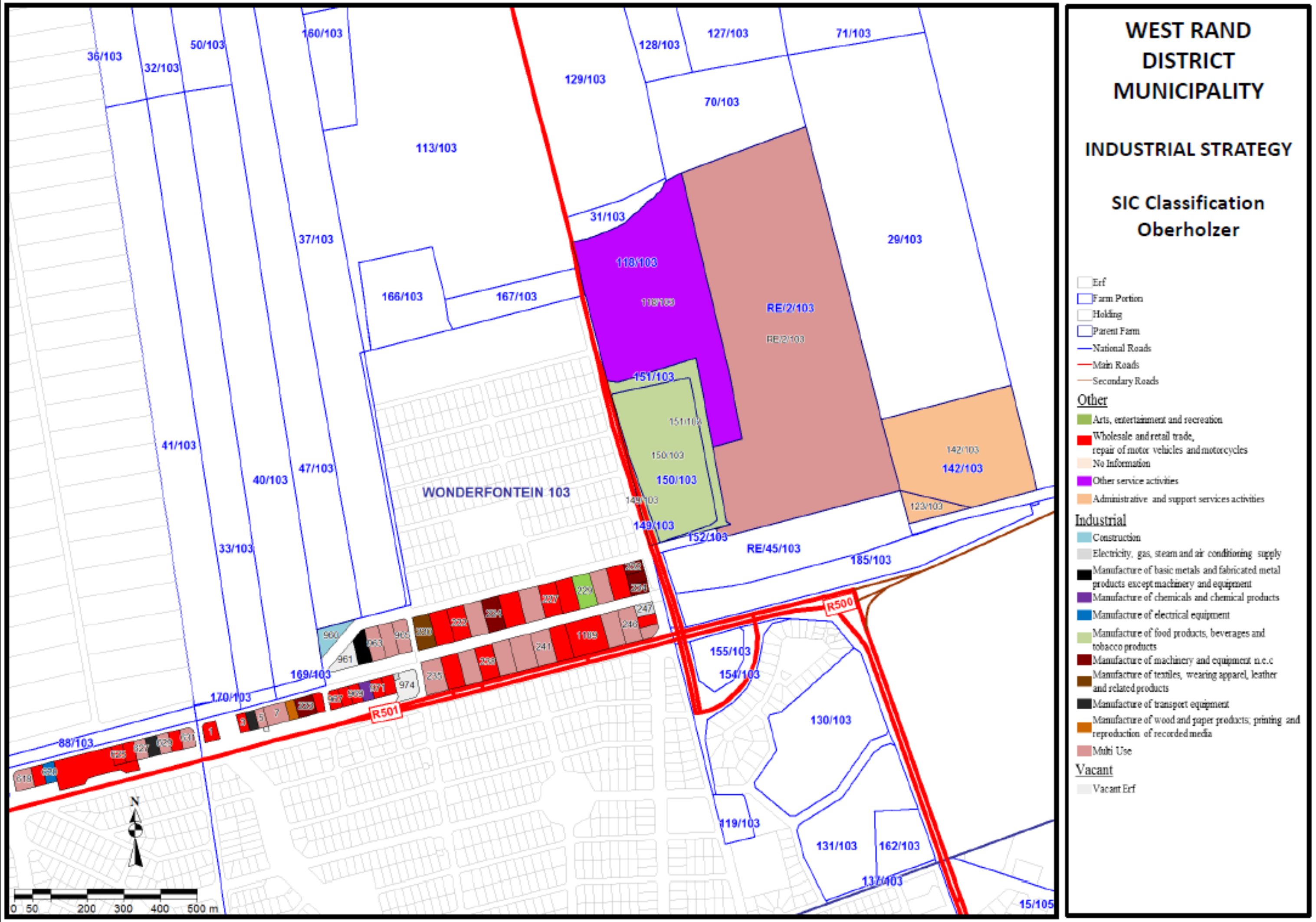

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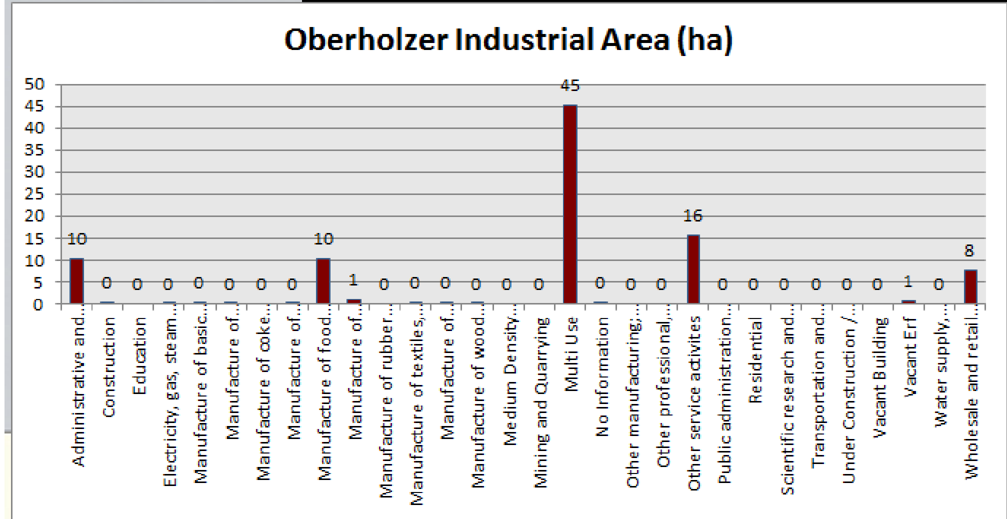
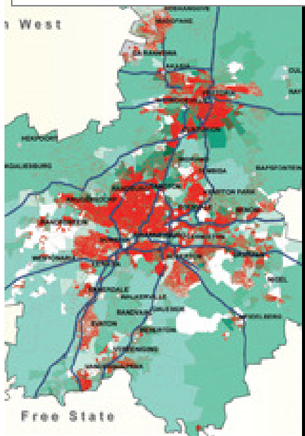
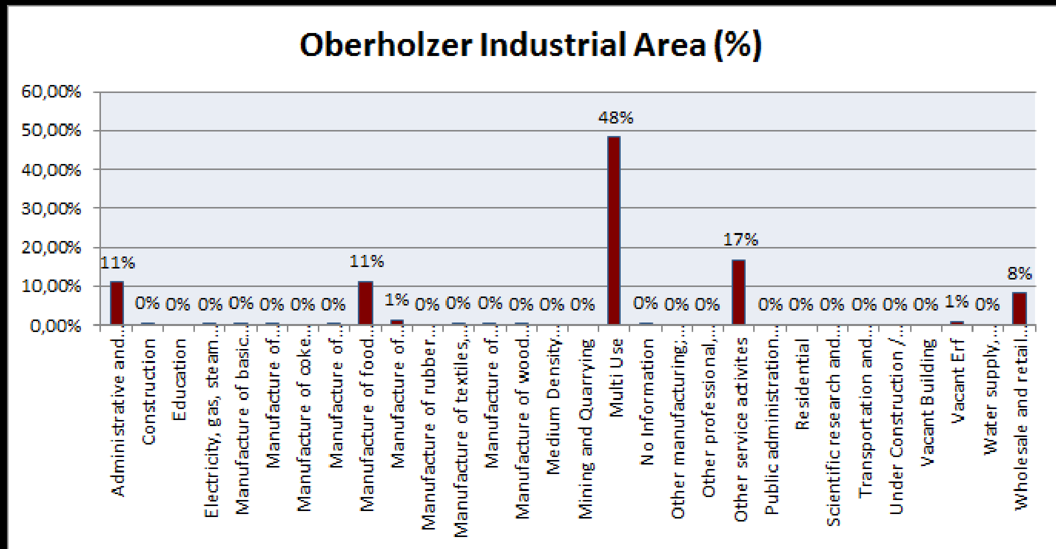
Real Estate Market Studies

MERAFONG CITY - OBERHOLZER INDUSTRIAL NODE



- Main industrial activities:
  - Multi-use (45 ha / 48%)
  - Other service activities (16ha / 17%)
  - Administrative and support services activities (10ha / 11%)
  - Manufacture of chemicals & related.





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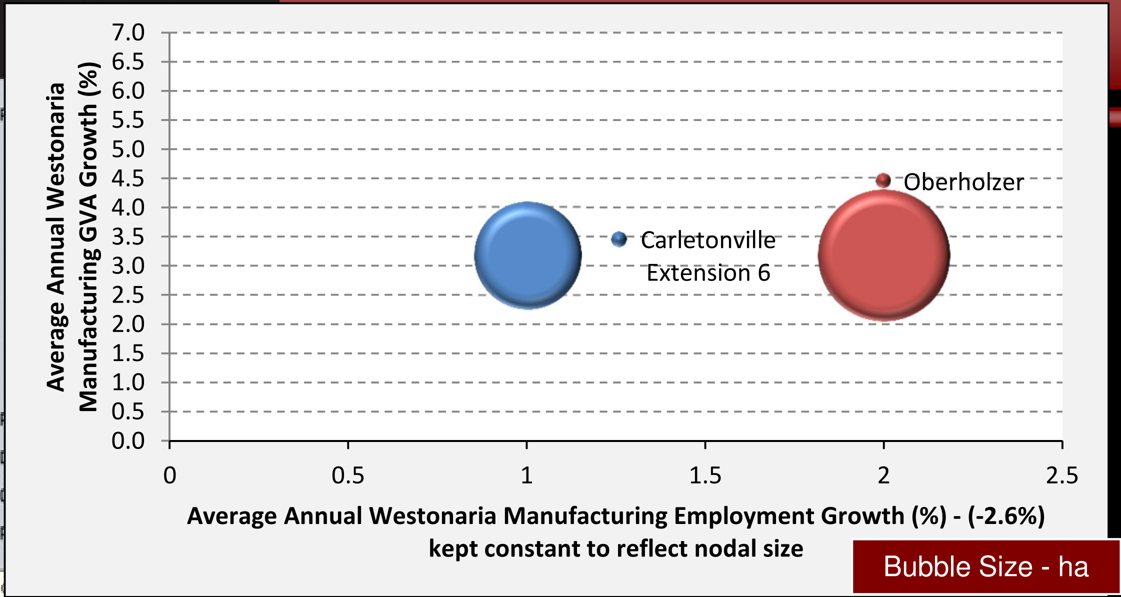
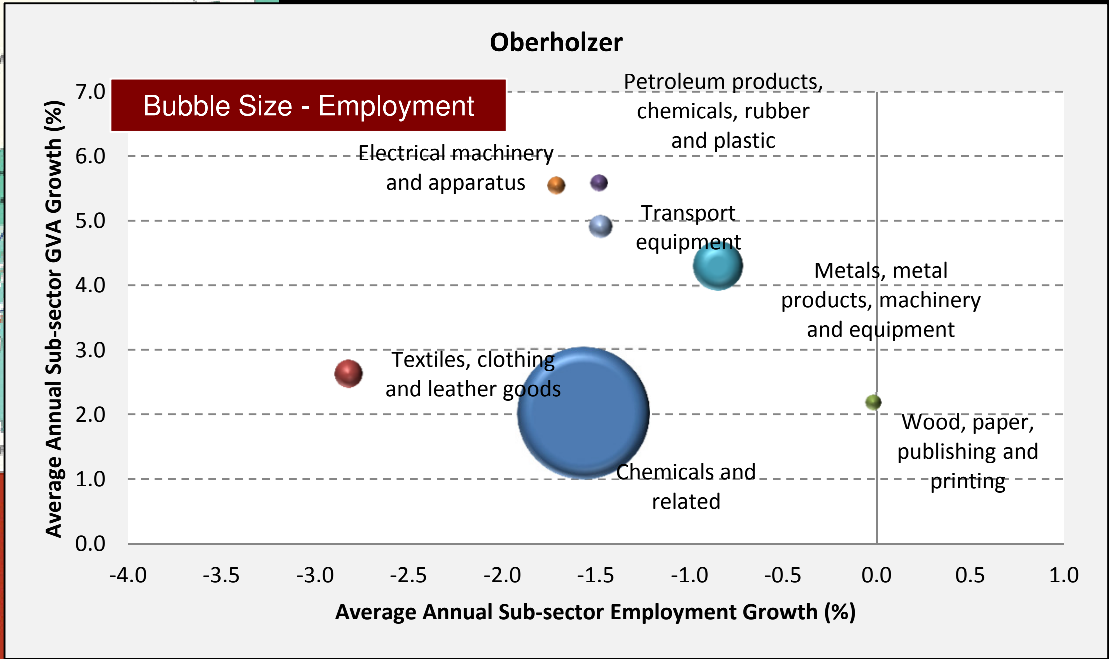
MERAFONG CITY LM - OBERHOLZER





- Oberholzer represents the larger of the two industrial nodes in Merafong
- 93.84 ha in extent
- Pure industrial concerns: 13.8%
- Development opportunity - Vacant erfs: 0.8% (0.76ha).

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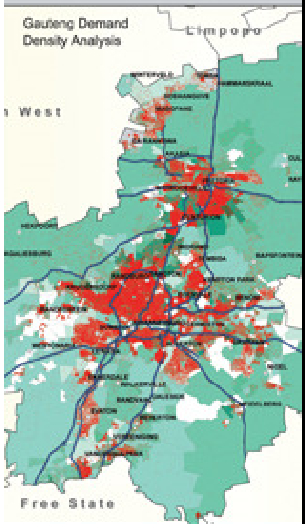

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MERAFONG CITY - OBERHOLZER INDUSTRIAL NODE

- Prominent type of industries
  - Multi-use
  - Service Industries
  - Heavy/ Noxious Industries
  - (One large multi-use site, to the east (Re/2/103) skews the data – the site includes engineering services but predominantly comprises of a horse riding club)

- Prominent activities:
  - Wholesale / auto repairs
  - Food outlets / trade

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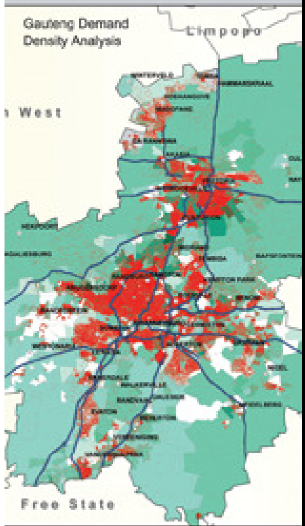

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MERAFONG CITY - OBERHOLZER INDUSTRIAL NODE

Strengths

The industrial area is configured along the east/west rail line between West Rand and North West.

Weaknesses

- Limited exposure and sight value
- Nearly fully developed; limited growth potential.

Opportunities

- Localised neighbourhood improvement interventions

Threats

- The linear industrial area is surrounded by residential and other non-industrial uses.
- Limited main road accessibility.

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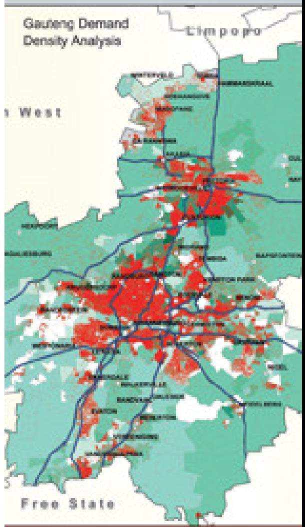

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WESTONARIA LOCAL MUNICIPALITY

- Westonaria Industrial Sector and Sub-Sector Competitiveness Analysis
- Nodal Analysis

A New Edge to Market Research

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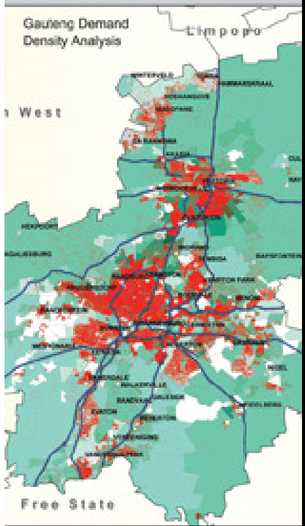

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WESTONARIA LM – OVERVIEW

- Westonaria was proclaimed in 1938 as a result of all the mining activities that took place in this area since 1910 when the first shaft – Pullinger Shaft was sunked. Venterspost town was proclaimed in 1937; Hillshaven, Glenharvie, Waterpan and Libanon were mainly established as mining residential areas.
- Westonaria Local Municipality is providing services to these areas.
- Zuurbekom is mainly earmarked for agricultural purposes.
- Bekkersdal was established in 1945 and administered under Westonaria Town Council.
- Westonaria is situated amidst gold fields and forms the nucleus of five gold mines.
- The greater Westonaria consists of a number of satellite towns, being – Westonaria, Hillshaven, Glenharvie, Venterspost, Libanon, Waterpan, Bekkersdal and Simunye.

WESTONARIA INDUSTRIAL NODES

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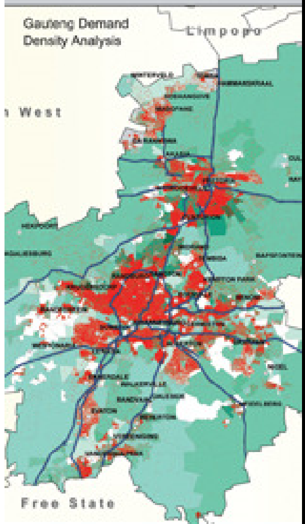

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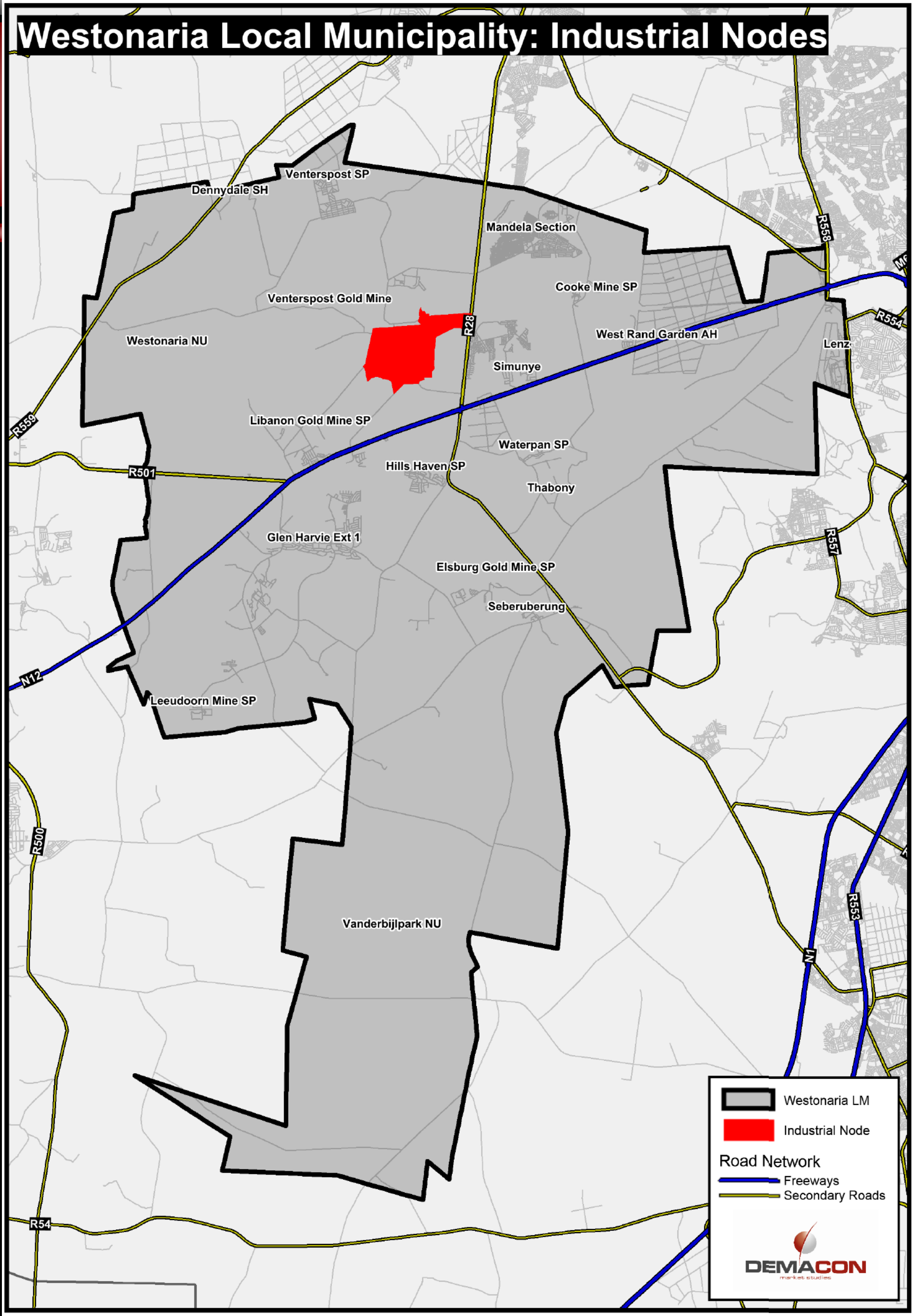

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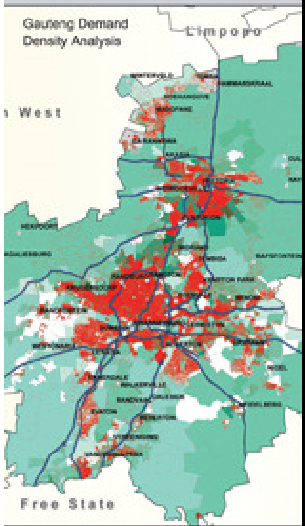

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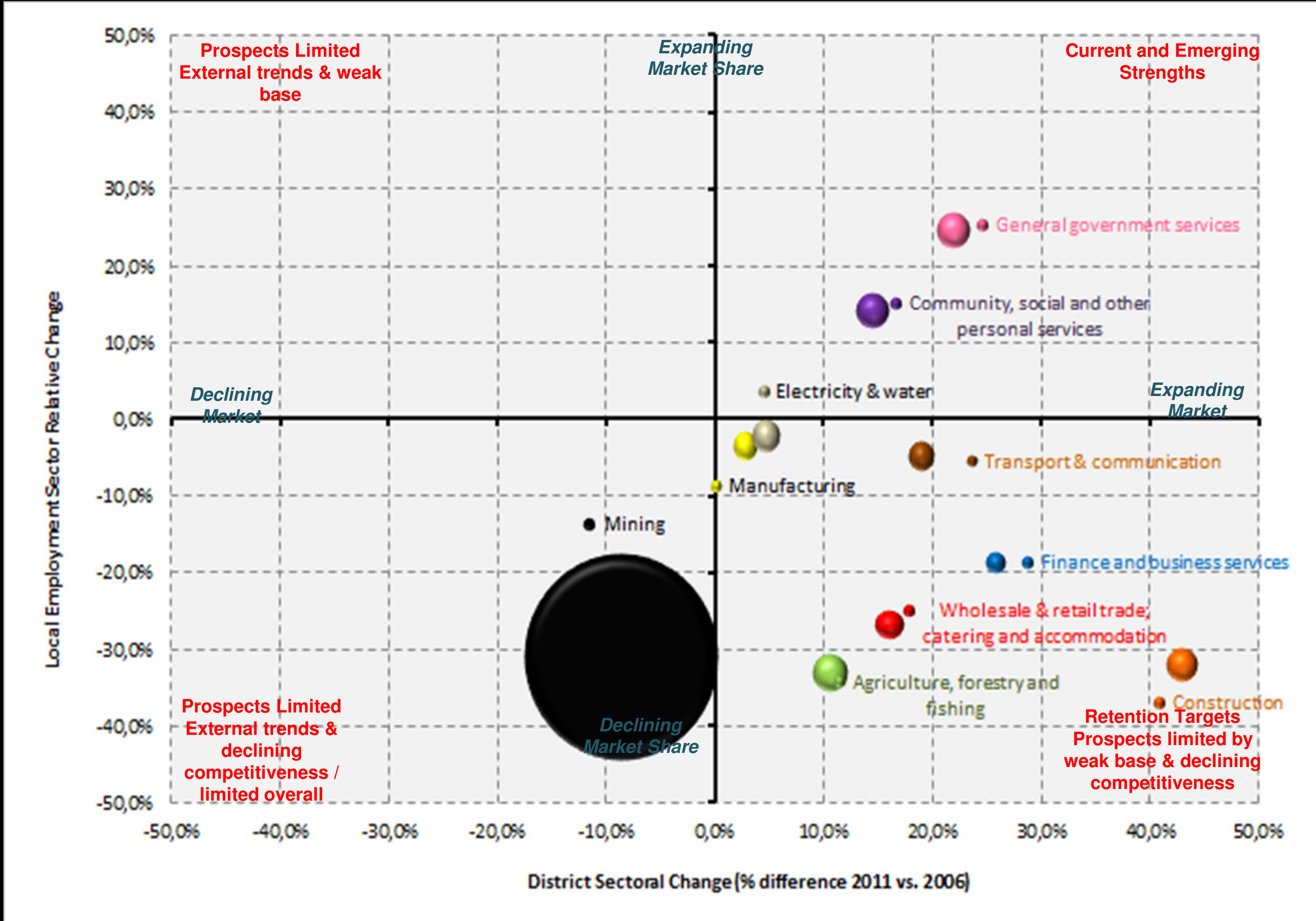
WESTONARIA KEY SECTORS



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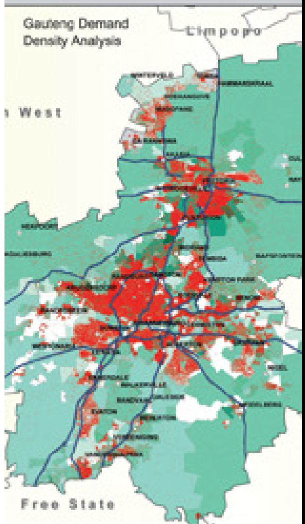

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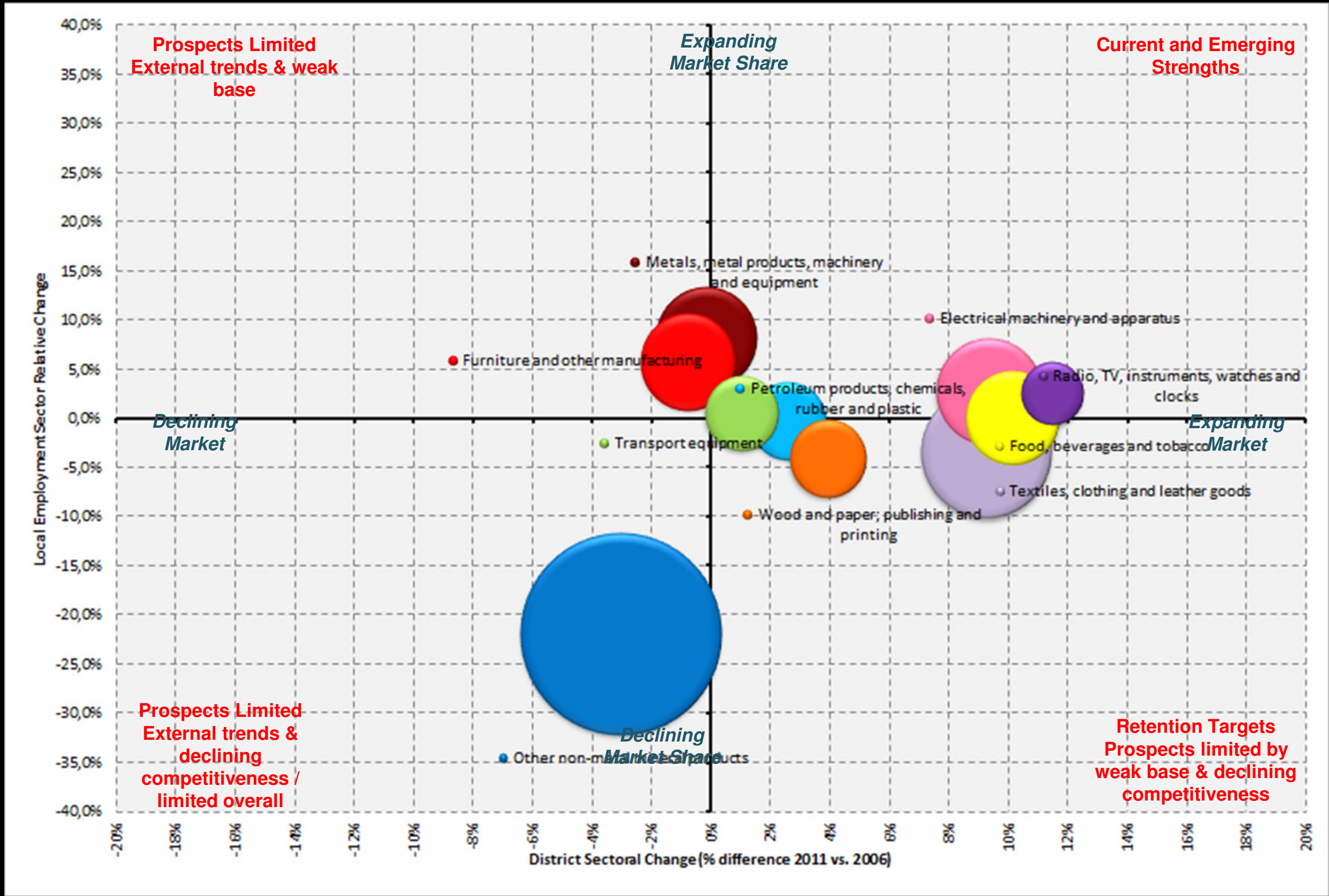
WESTONARIA KEY SUB-SECTORS



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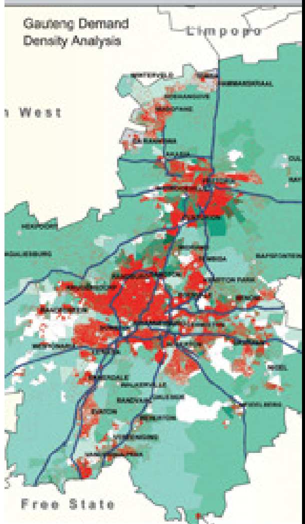

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WESTONARIA KEY SECTORS AND SUB-SECTORS

	Main Sectors	Sub-sectors
Leading Sectors		
Current and Emerging Strengths ***LSRG leading (grow faster than district) and DG positive***	✓ Community, social and personal services ✓ General government services	✓ Food, beverages and tobacco ✓ Electrical machinery and apparatus ✓ Radio, TV, instruments, watches and clocks ✓ Transport equipment ✓ Community, social and personal services, other
Prospects limited by external trends and weak base ***LSRG leading (grow faster than district) and DG negative***	✓ None	✓ Metals, metal products, machinery and equipment ✓ Furniture and other manufacturing
Lagging Sectors		
High priority retention target and prospects limited by weak base and declining competitiveness ***LSRG lagging (grow slower than district) and DG positive***	✓ Agriculture, forestry and fishing ✓ Manufacturing ✓ Utilities ✓ Construction ✓ Wholesale and retail trade, catering and accommodation ✓ Transport, storage and communication ✓ Finance, insurance, real estate and business services	✓ Textiles, clothing and leather goods ✓ Wood, paper, publishing and printing ✓ Petroleum products, chemicals, rubber and plastic ✓ Electricity ✓ Water ✓ Wholesale and retail trade ✓ Catering and accommodation services ✓ Transport and storage ✓ Communication ✓ Finance and insurance ✓ Business services
Prospects limited by external trends and declining competitiveness and prospects limited overall ***LSRG lagging (grow slower than district) and DG negative***	✓ Mining and quarrying	✓ Other non-metal mineral products

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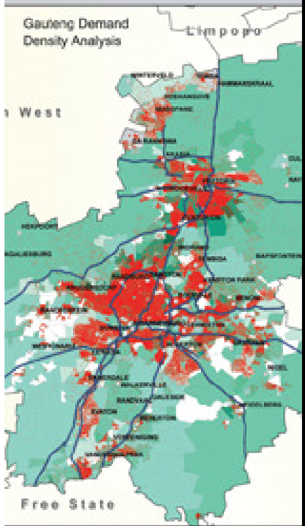

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WESTONARIA INDUSTRIAL NODES

- Westonaria

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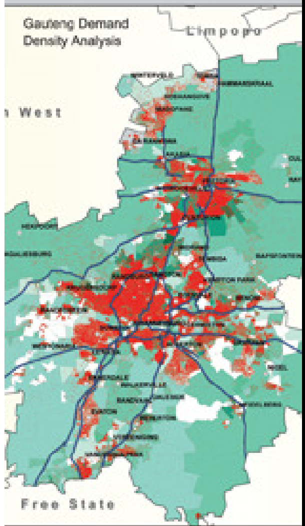

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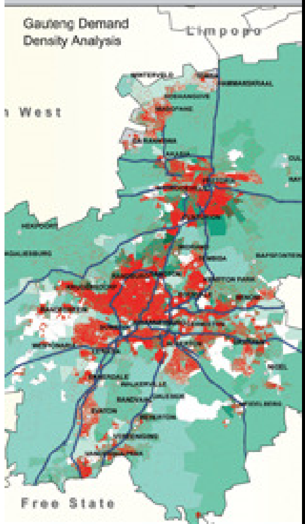

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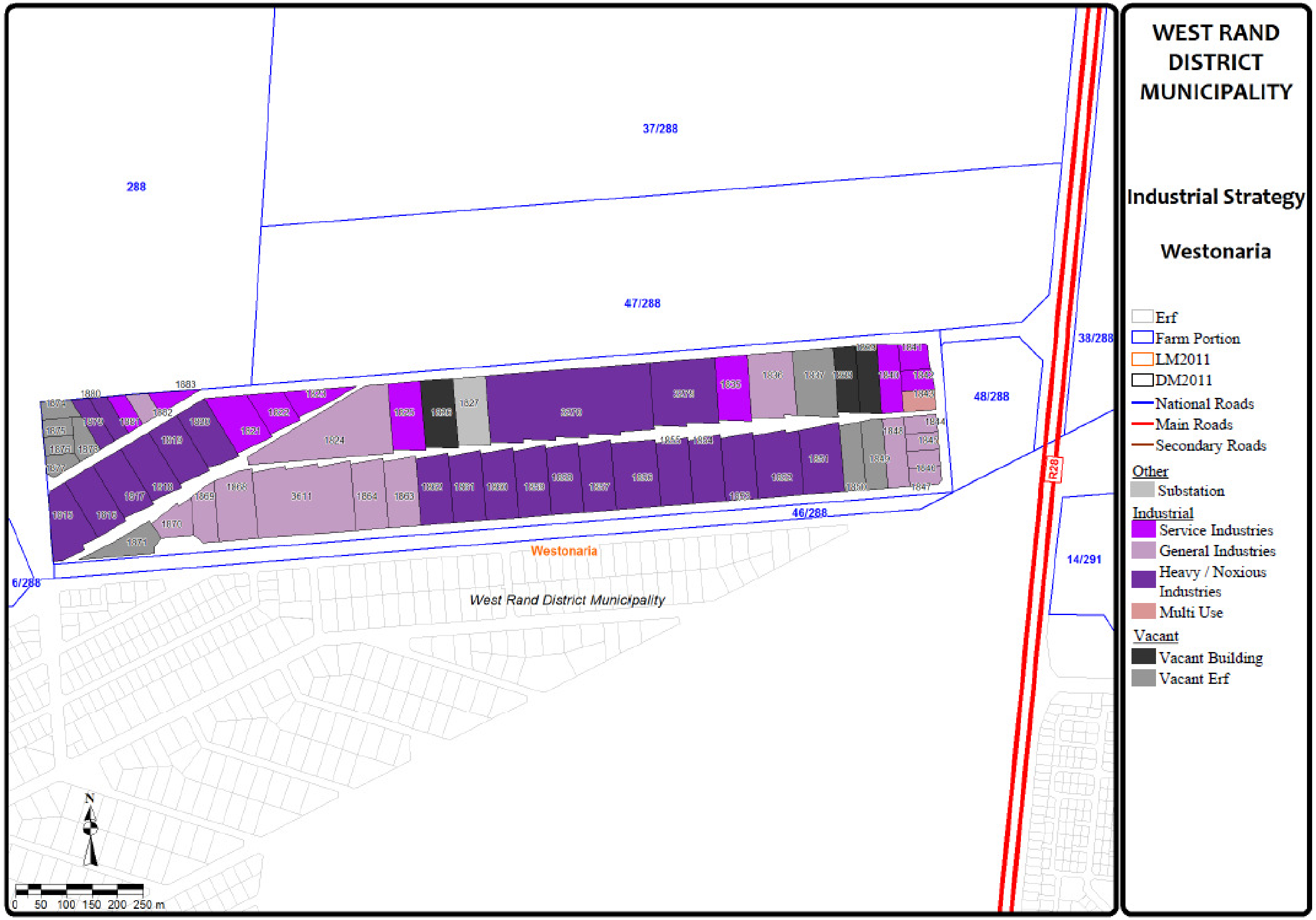
WESTONARIA – WESTONARIA INDUSTRIAL NODE



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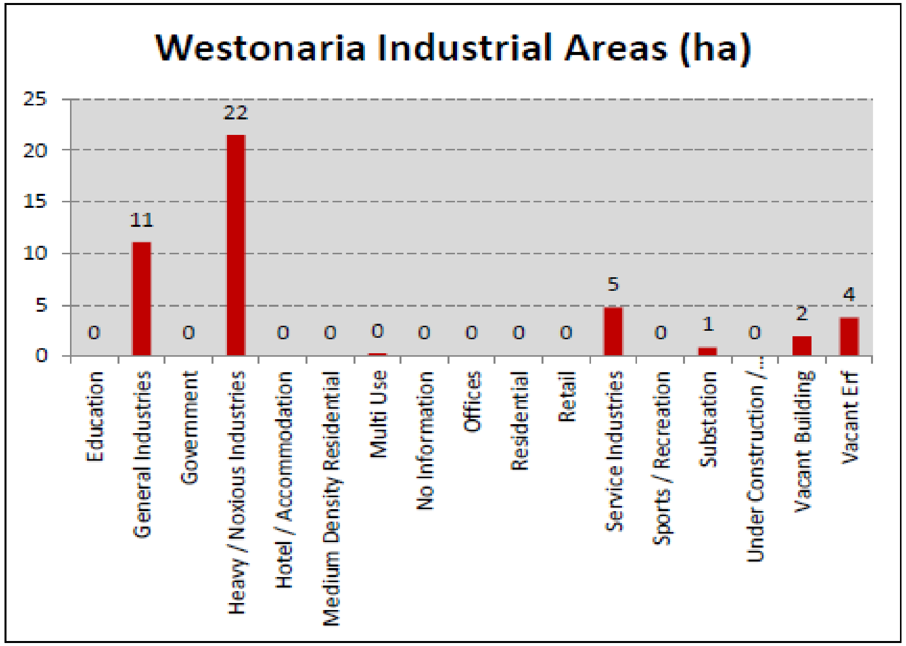
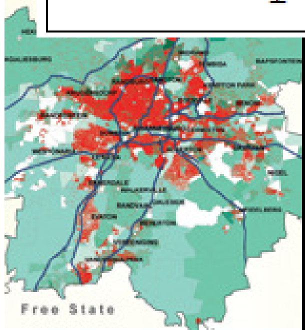
Real Estate Market Studies

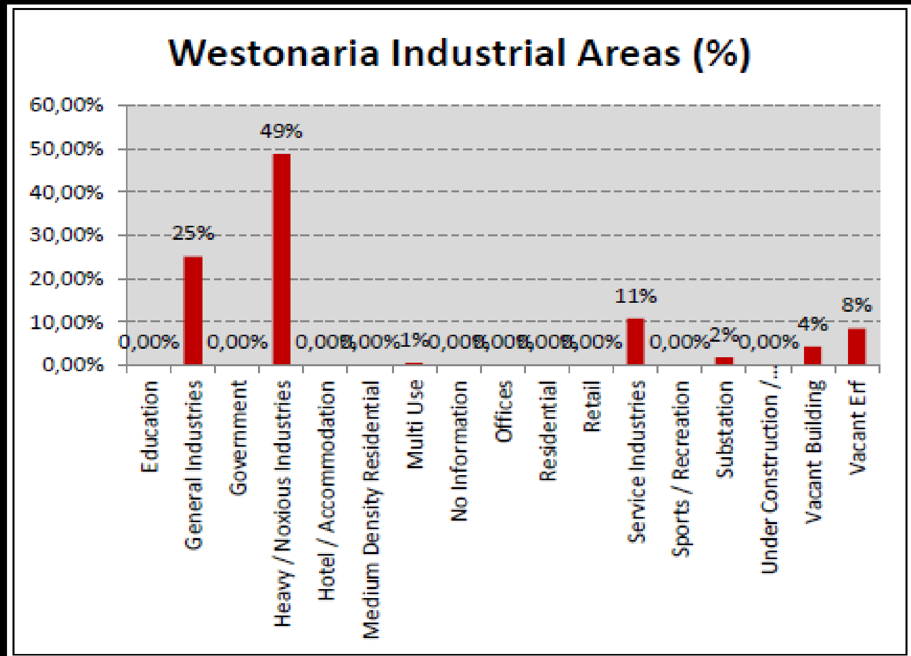
WESTONARIA – WESTONARIA INDUSTRIAL NODE



- Main industrial land use:
  - Heavy / noxious industries (22ha / 49%)
  - General industries (11ha / 25%)
  - Service industries (5ha / 11%)
  - Vacant (4ha / 8%)



- Westonaria Total Industrial Area: 44ha



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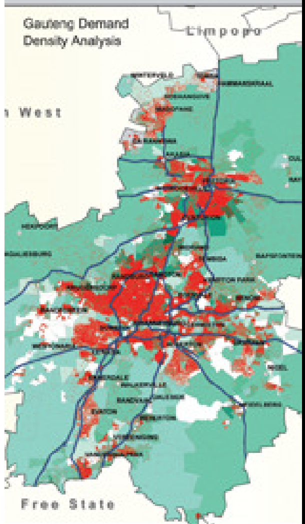

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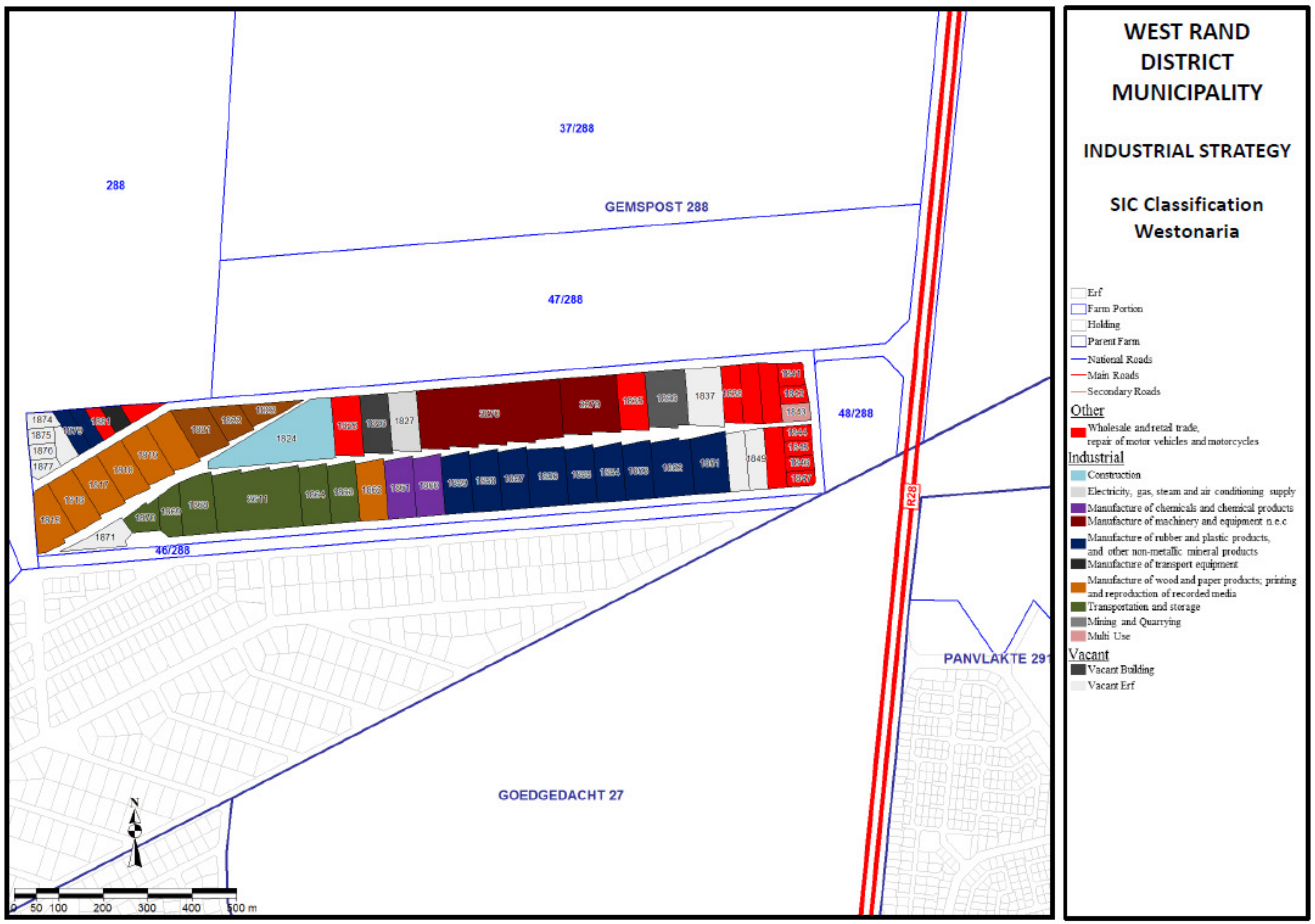

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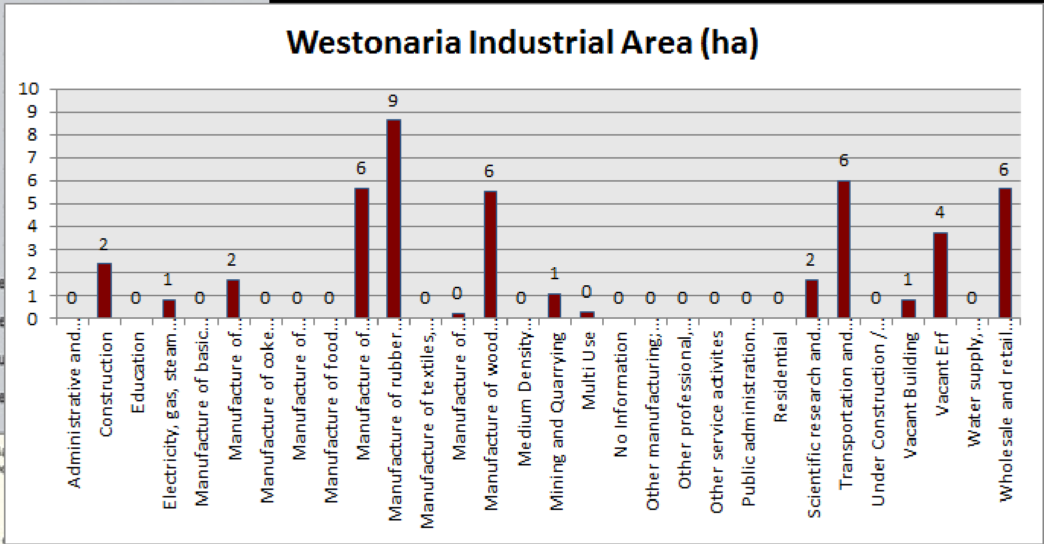
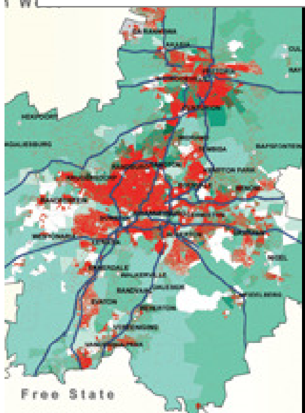
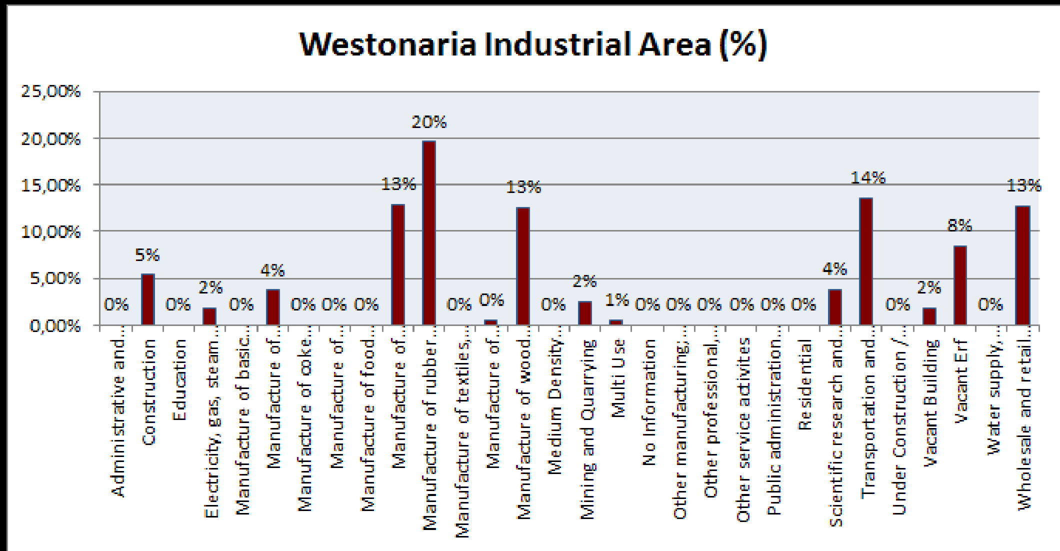


- Main industrial activities:
  - Manufacture of rubber and plastic products, and other non-metallic mineral products (9ha / 20%)
  - Manufacture of wood and paper products; printing and reproduction of recorded media (6ha / 18%)
  - Transportation and storage (6ha / 18%)





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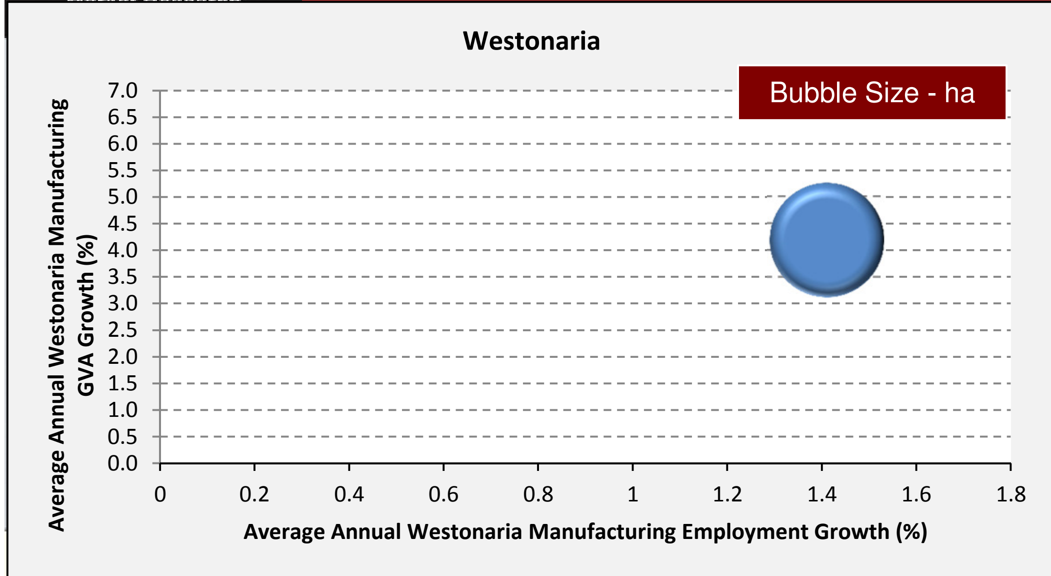
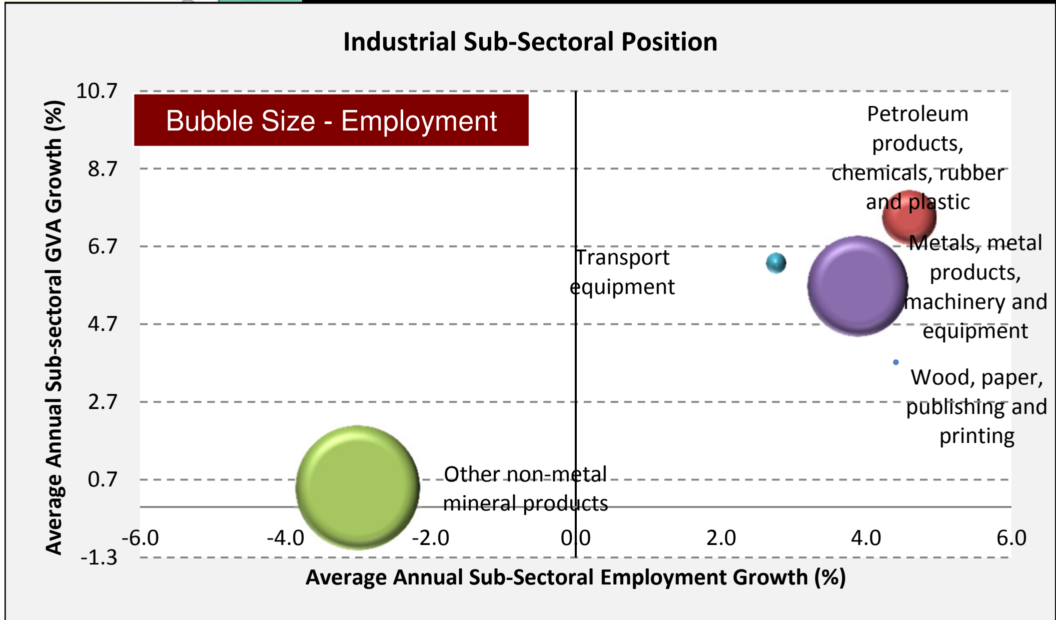
WESTONARIA LM





- Single industrial township in Westonaria
- 44.07 ha in extent
- Pure industrial concerns: 49.3%
- Development opportunity - Vacant erfs: 8.5% (3.7ha)
- Note:
  - 14% of land used for transport & storage
  - 13% of land used for wholesale, retail & automotive services.

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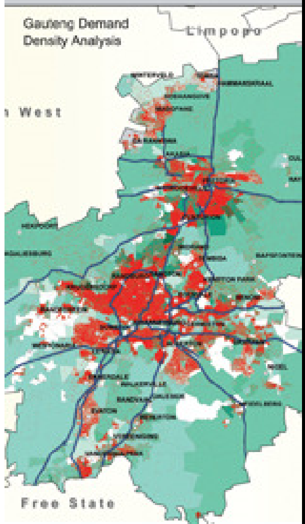

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WESTONARIA – WESTONARIA INDUSTRIAL NODE

- Prominent type of industries:
  - Heavy/ Noxious industrial
  - General Industries
- Prominent activities:
  - Wholesale and retail trade / Auto repairs – SAB Distribution Centre.
  - Manufacturers of Rubber and plastic products, and other non-metallic mineral products - Griniger Aveng concrete
  - Manufacturers of machinery and equipment - Avery Manufacturing Duraset.
  - Transport and Storage - Murray and Roberts
  - Manufacturers of wood and paper products, printing and reproduction of recorded media - Seagull Mining.

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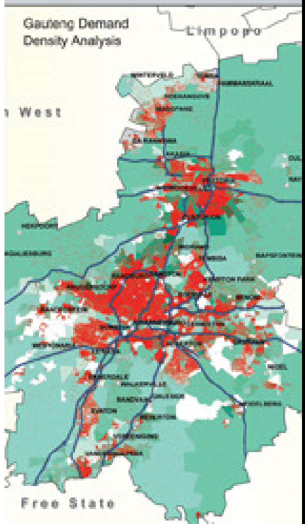

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WESTONARIA – WESTONARIA INDUSTRIAL NODE

Strengths

The industrial area is directly accessible from the R28.

- Low vacancy.

Weaknesses

- Limited sign value and exposure.
- Orientation away from main road.

Opportunities

- N12 corridor
- Good regional strategic location (N12 / R28).

Threats

- Undermined land
- Dolomite

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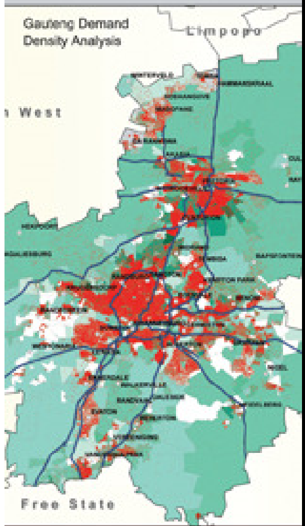

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Part 3

INDUSTRIAL DEVELOPMENT STRATEGY FUNDAMENTALS

1. Economic building blocks for sustainable industrial development
2. Industrial Localisation drivers & bid-rent factors
3. Industrial Sector Support

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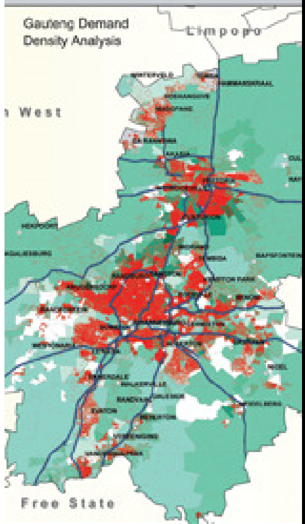

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1. ECONOMIC BUILDING BLOCKS FOR SUSTAINABLE INDUSTRIAL DEVELOPMENT

Factor Input 1 Land (incl. Space Economy)
- Availability of resources (renewable & non-renewable)
- Bulk services capacity
- Availability of land for spatial expansion / growth
- Stability of utilities
- Stable business environment
- Security of tenure
- Security of real estate values
- Spatial expansion capacity

Factor Input 2 Labour / Demographics
- Labour supply & demand
- Availability of skills
- Physical & mental aptitudes
- Labour absorption rate
- Population growth
- Downstream demand – household consumption / disposable income
- Social / cultural tolerance

Factor Input 3 Capital
- Capital formation
- Investment leveraging
- Attractive risk and returns profile
- Capital growth, income stream growth
- Business formation (new – small, medium, micro)
- Business retention and expansion capacity

Factor Input 4 Entrepreneurship
- Global competitiveness
- Research & Development (R & D) capacity
- Energy
- Job creation
- Work ethic: focus on production – not industrial action
- Profitable environment; minimal red tape
- Human, intellectual & social capital formation

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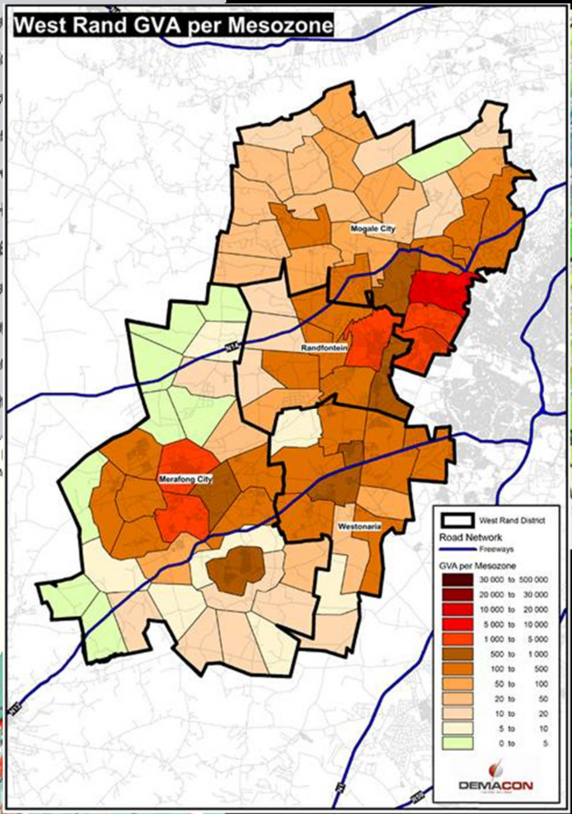
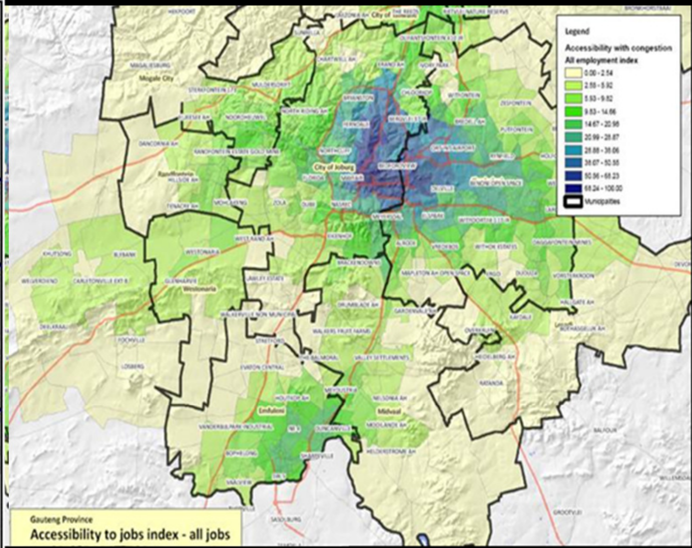
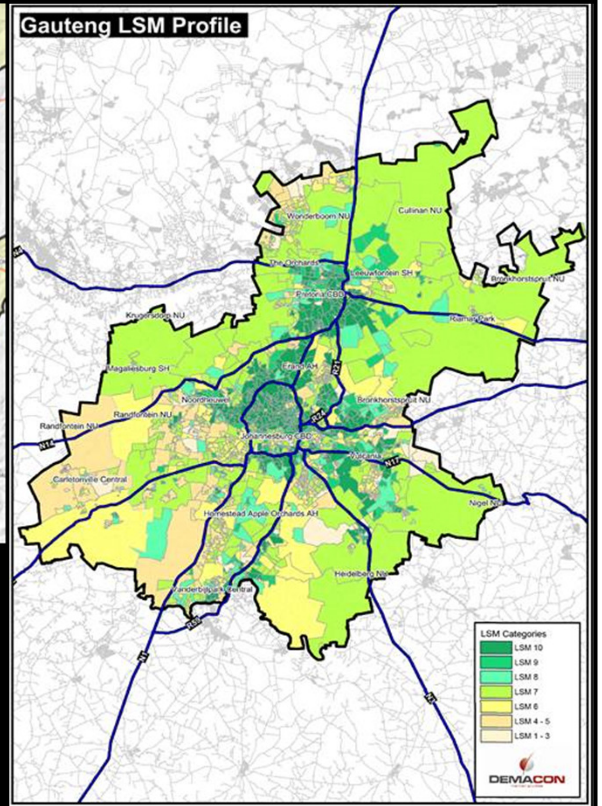
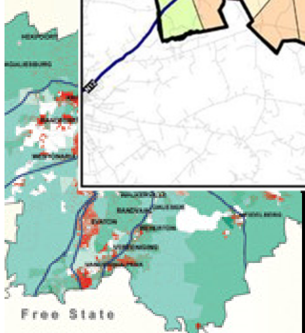
2. INDUSTRIAL LOCALISATION DRIVERS – KEY ECONOMIC CONSIDERATIONS

Real Estate Market Studies









1. Urban economic energy dissipates from the core to the periphery.
2. Projects closest to the high energy nodes and corridors are most likely to have the greatest / most sustainable impact.

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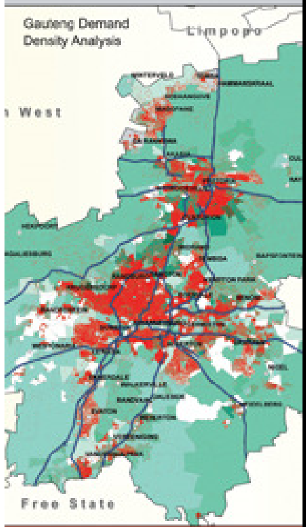

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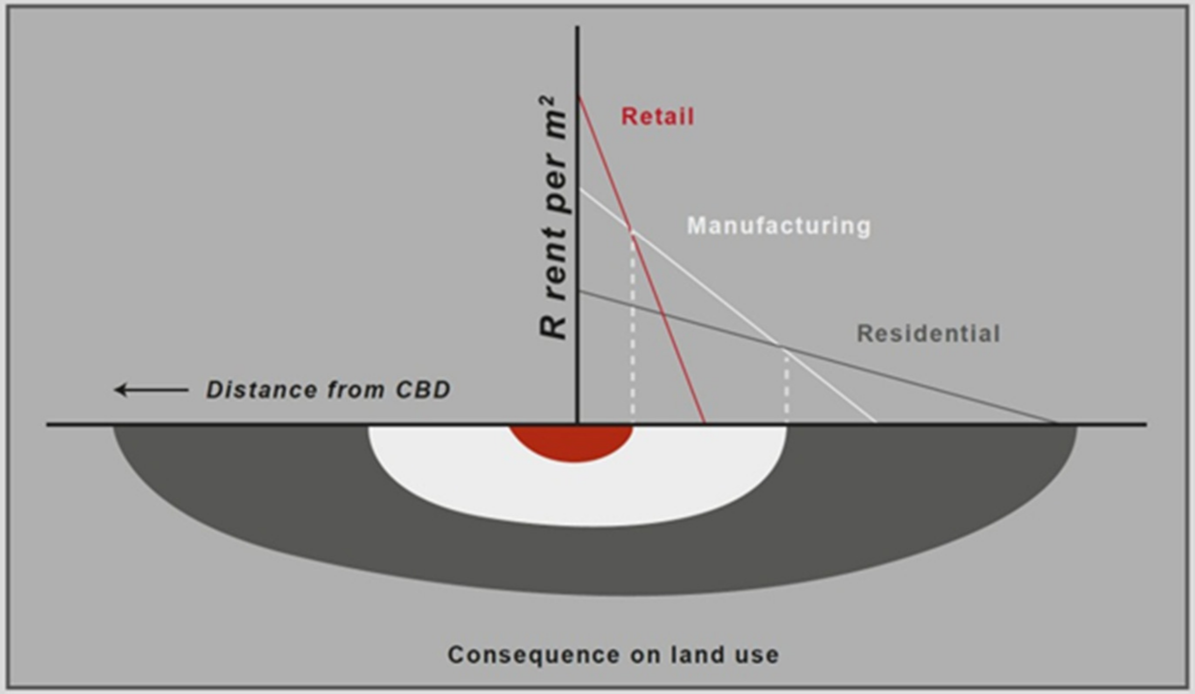
INDUSTRIAL DEVELOPMENT SEEKS WELL LOCATED, COMPETITIVELY PRICED LAND

Rent Bid Curve



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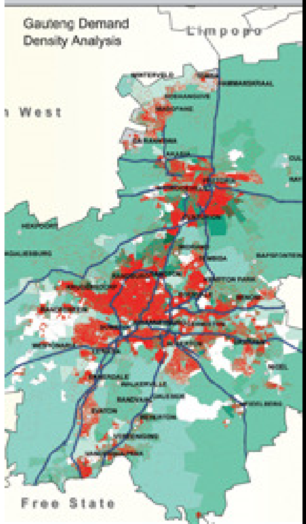

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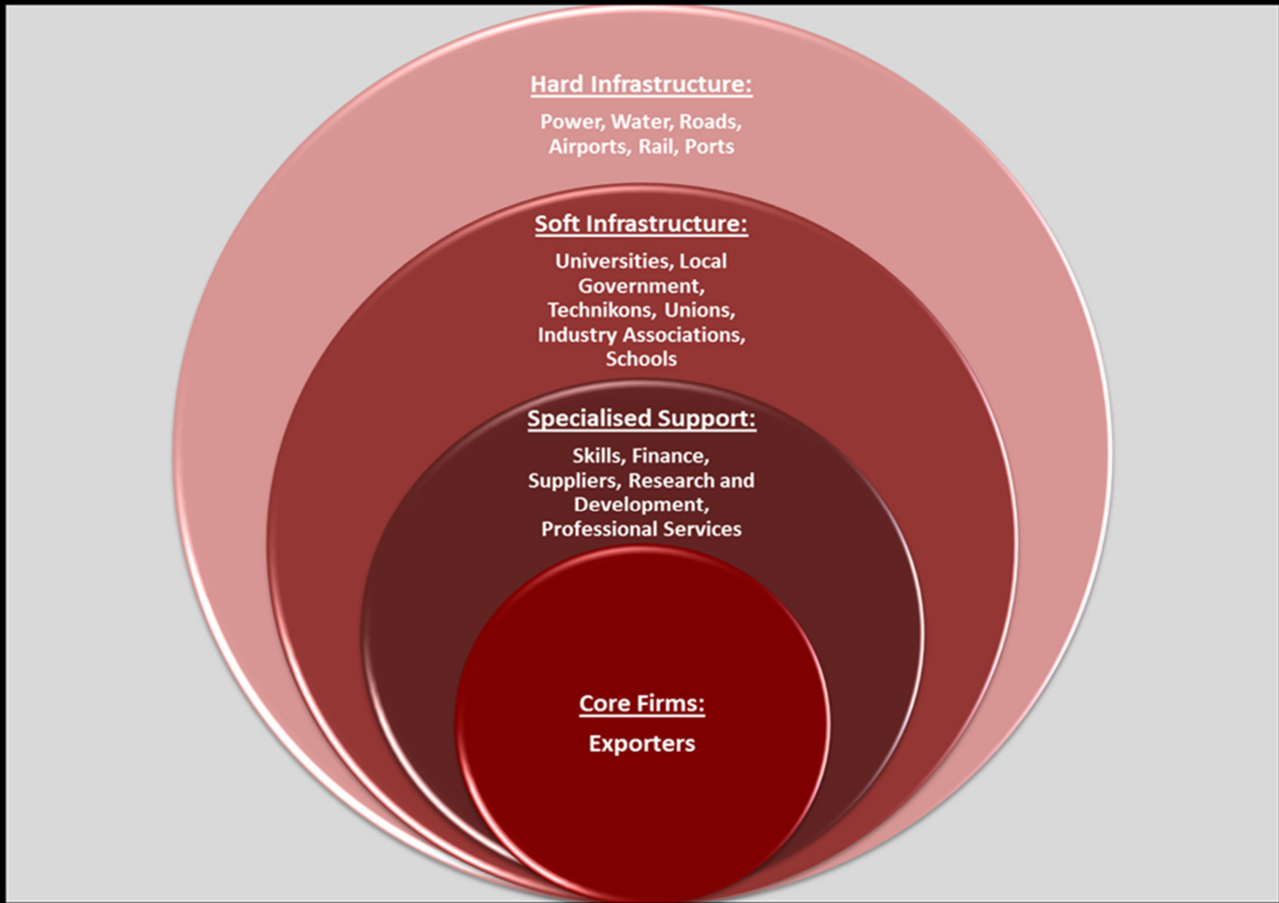
3. INDUSTRIAL SECTOR SUPPORT

CLUSTER COMPOSITION



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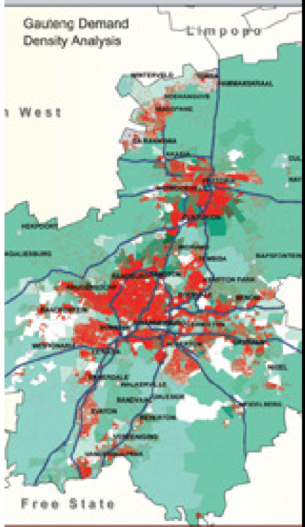

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BALANCED DEVELOPMENT STRATEGY

Factor conditions

Related & supporting industries

Demand conditions

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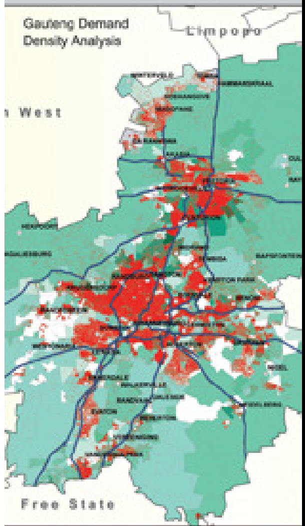

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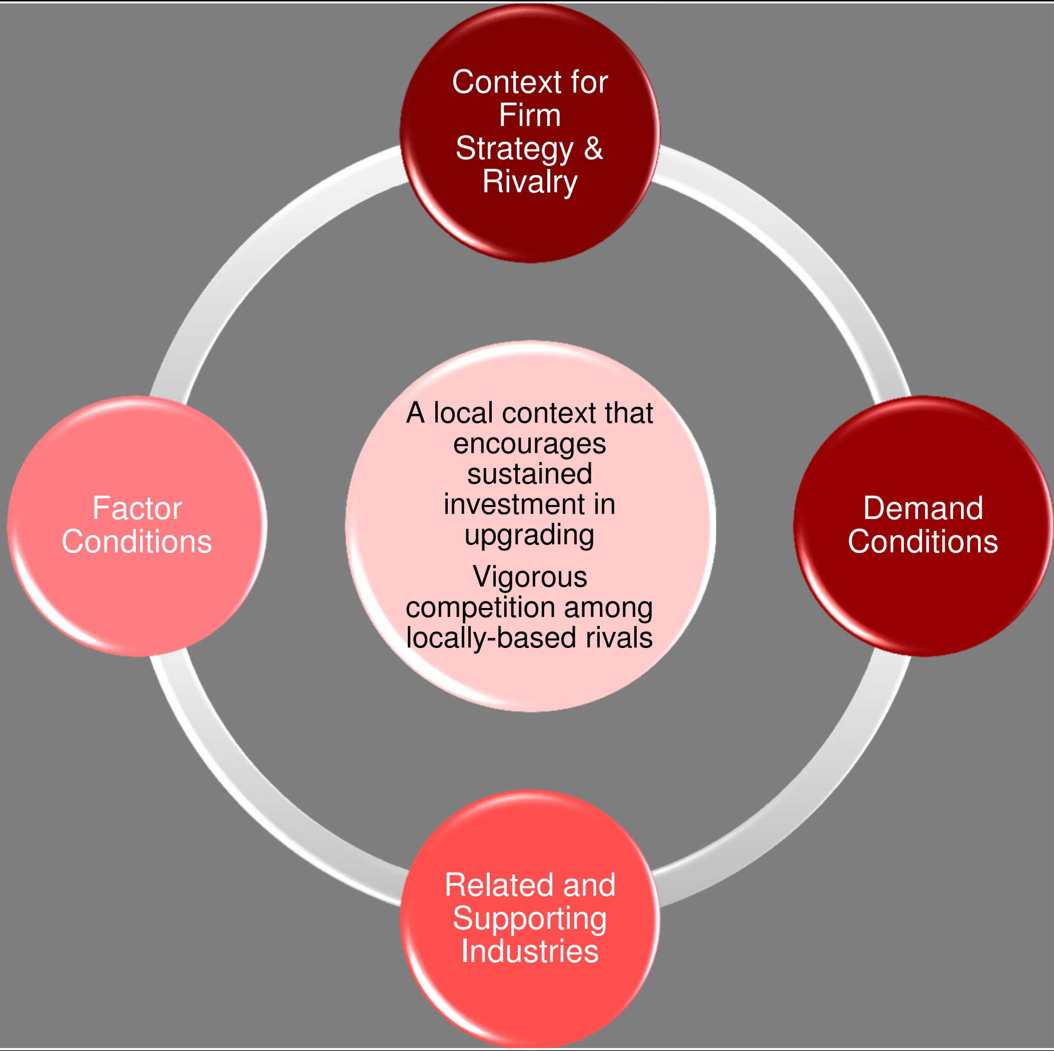
PORTER'S DIAMOND – *HEALTHY INDUSTRIAL ENVIRONMENT*



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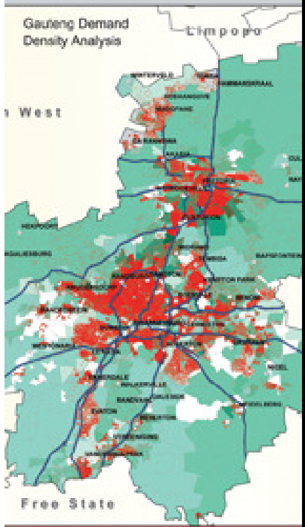

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PROJECT TYPE 1 – NEW INDUSTRIAL NODES

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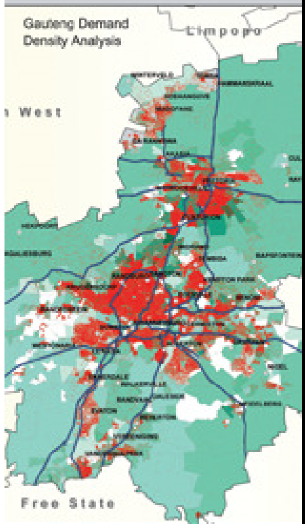

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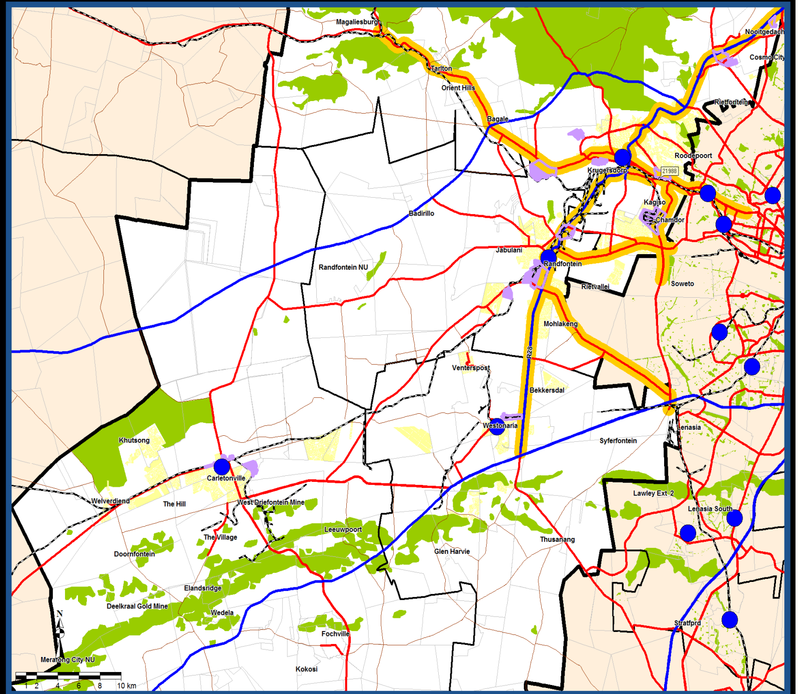
PROJECT TYPE 1 – NEW INDUSTRIAL NODES

MULDERSDRIFT / R28 CORRIDOR

- Location: R28 corridor – Silver Star Casino node
- Focus: industrial park focused on logistics, warehousing, distribution, wholesale trade. Brand the node / corridor – e.g. elements of "The Rand Trade & Knowledge Hub"
- Development Gap – YES
- Probability - HIGH



WESTONARIA / N12 CORRIDOR

- Location: N12 corridor – Soweto Westonaria strip
- Focus: industrial park focused on logistics, warehousing, distribution, wholesale trade
- Development Gap – YES
- Probability – Moderate - High

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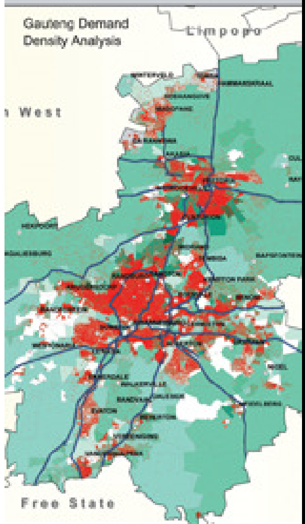

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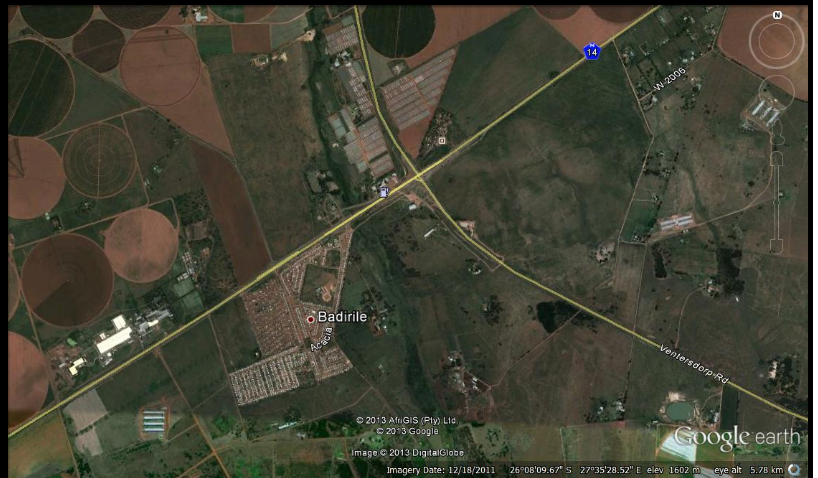
PROJECT TYPE 1 – NEW INDUSTRIAL NODES

TARLTON/ N14 NODE/ R24 CORRIDOR

- Location: Tarlton / N14 intersection / area
- Focus: agro-processing
- Development Gap – YES
- Probability – Moderate

BADIRILE NODE / N14 NODE

- Location: Badirile / N14 intersection / area
- Focus: agro-processing
- Development Gap – YES
- Probability – Moderate



<u>Note</u>: medium scale agro-processing plants have a tendency to locate on farms. Large scale plants gravitate towards centrally located, major urban markets. Feeds into downstream sectors.

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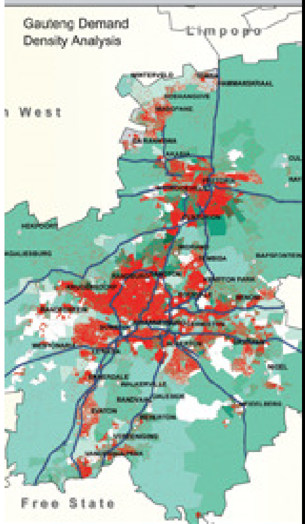

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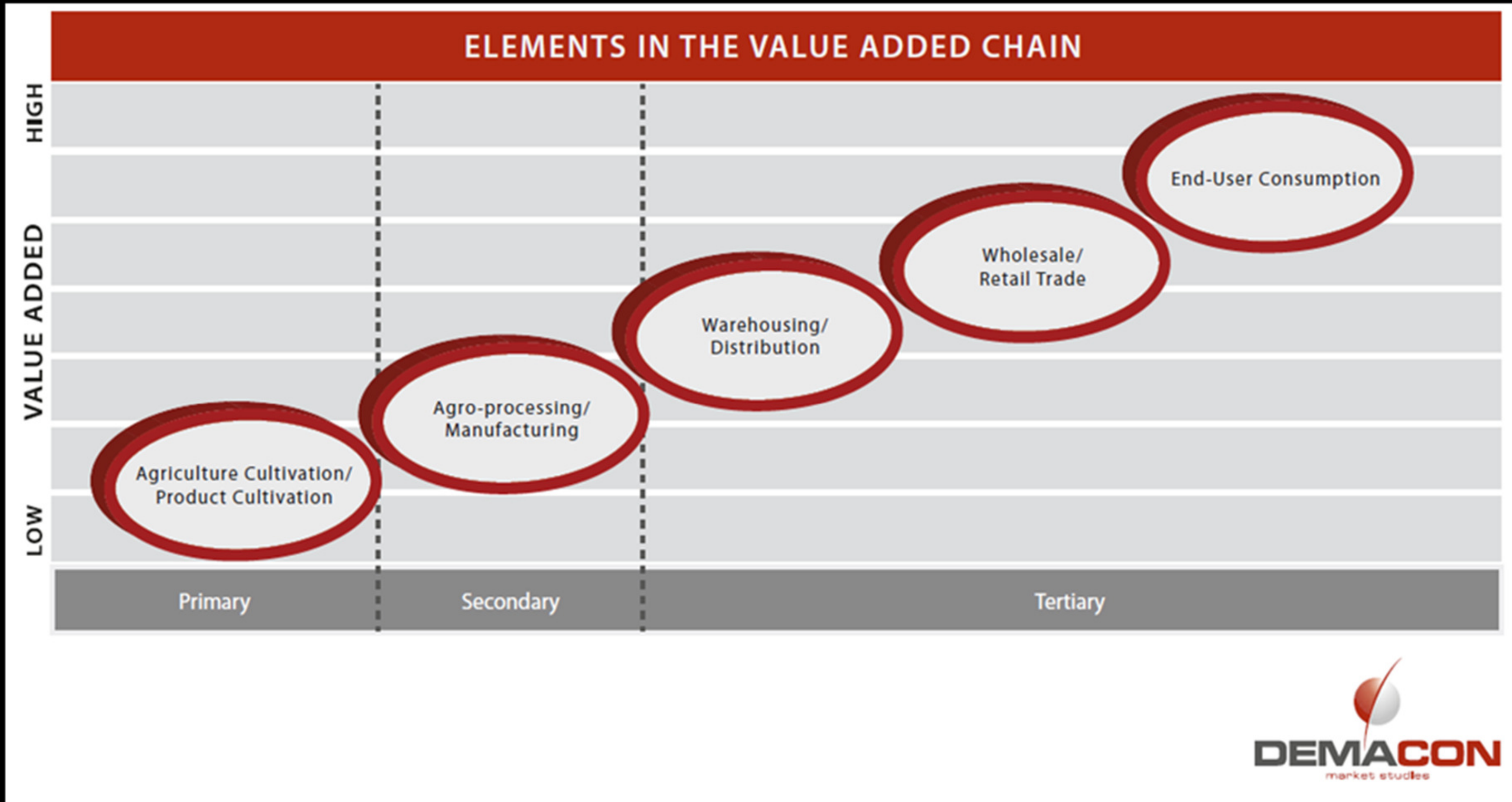
ELEMENTS IN THE VALUE ADDED CHAIN



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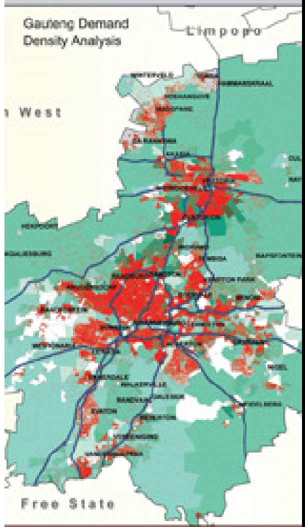

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PROJECT TYPE 2 – ESTABLISHED INDUSTRIAL NODES

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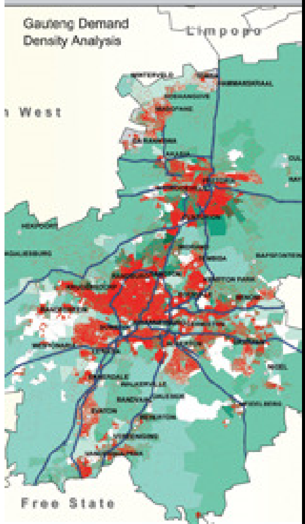

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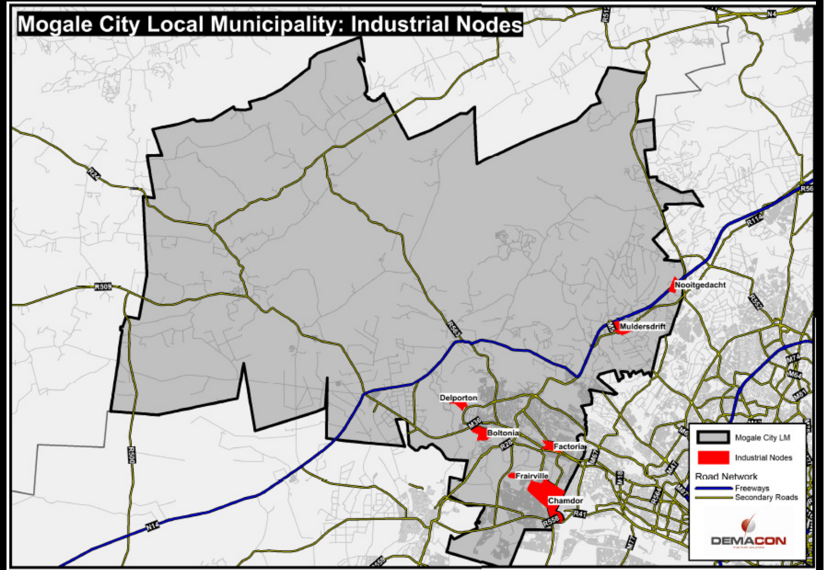
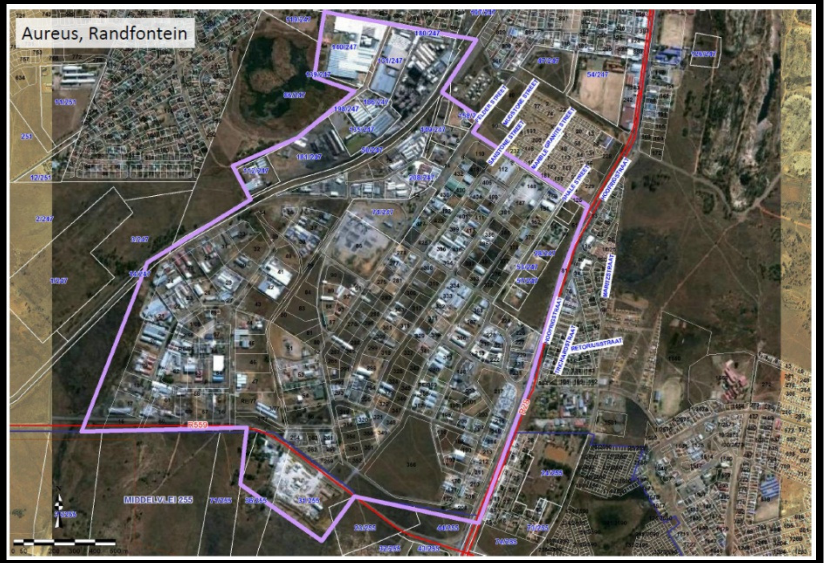
- **CHAMDOR / FACTORIA / BOLTONIA**
  - Location: Mogale City – within urban fabric
  - Focus: neighbourhood upgrade, security & branding programmes.
  - Development Gap – YES
  - Probability - HIGH

- **AUREUS**
  - Location: R28 corridor
  - Focus: neighbourhood upgrade, security & branding programmes; future expansion plan.
  - Development Gap – YES
  - Probability – HIGH





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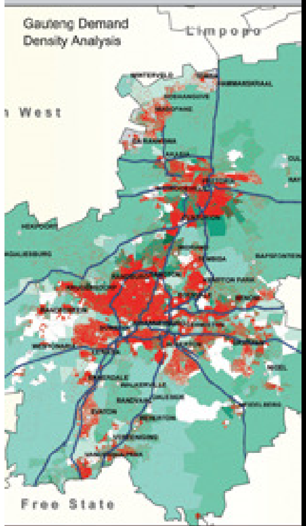

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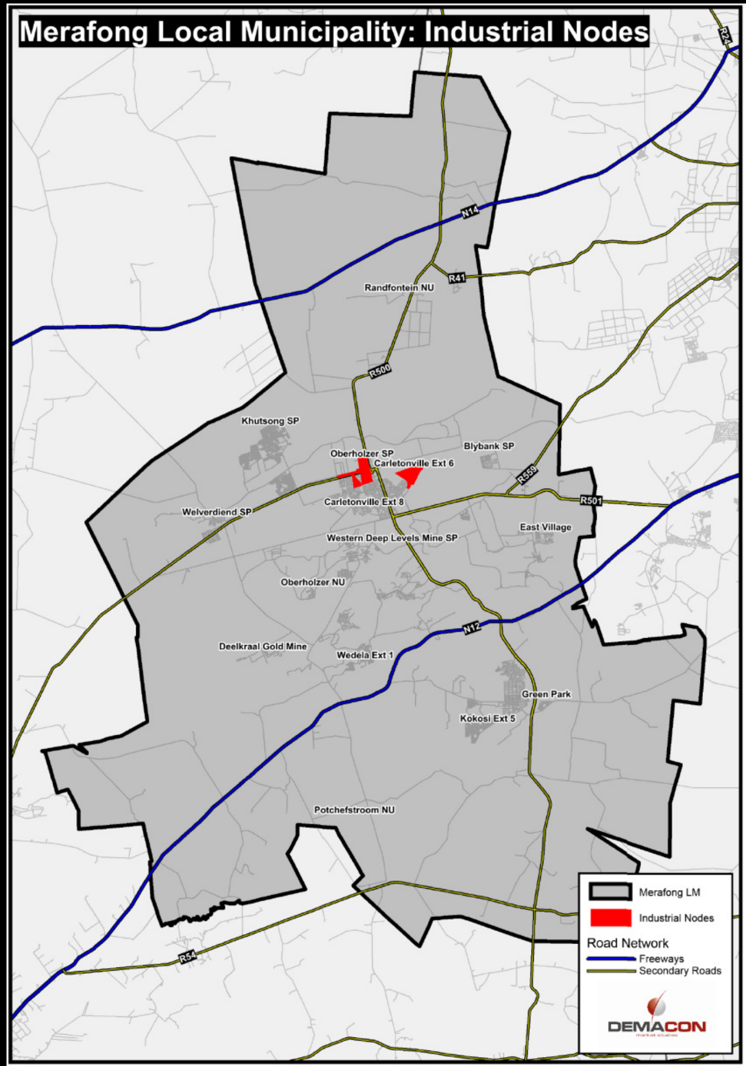
PROJECT TYPE 2 – ESTABLISHED INDUSTRIAL NODES

- **CARLTONVILLE**
  - Location: Merafong
  - Focus: SMME development; industrial hives; mining service related industries.
  - Development Gap – YES
  - Probability - Moderate
- **OBERHOLZER**
  - Location: Merafong
  - Focus: SMME development; industrial hives; mining service related industries.
  - Development Gap – YES
  - Probability – Moderate



A New Edge to Market Research

Real Estate Market Studies

- Retail
- Residential typology models
- Office
- Industrial
- Warehousing & distribution
- Tourism / Shortstay accomodation
- MICE activities

Real Estate and Fiscal Impact Analysis

Demographics Profiling & LSM Profiling

Customer In-store Surveys

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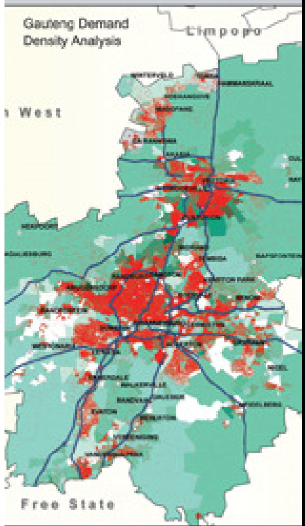

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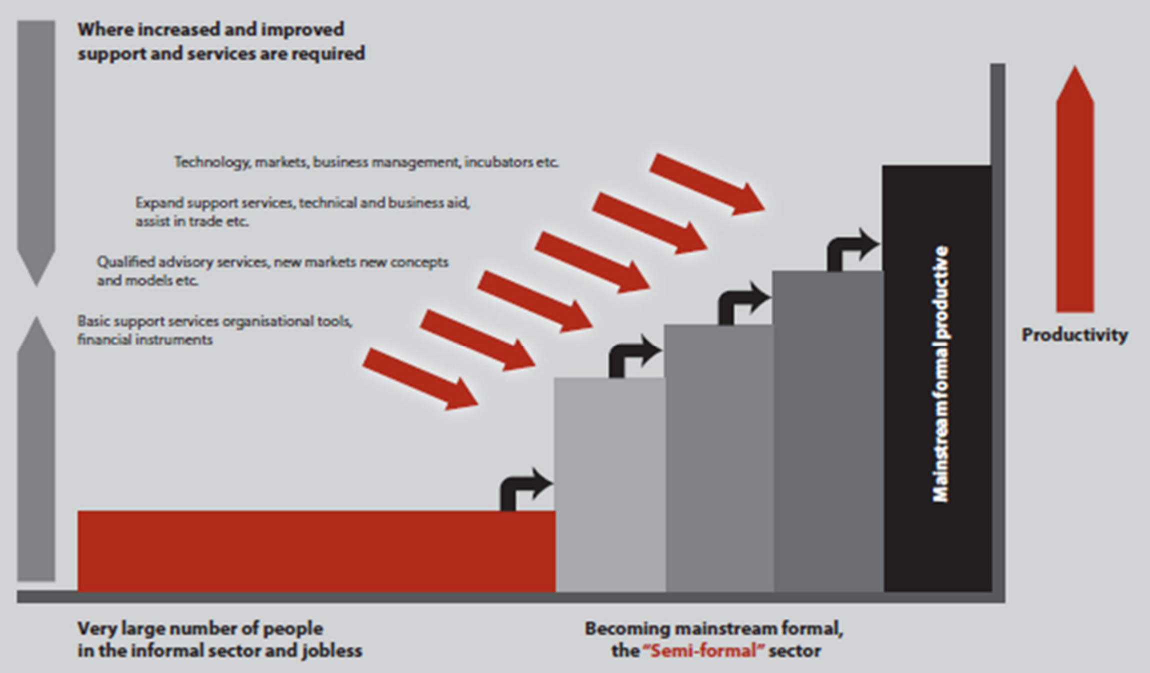
FORMALISATION MODEL

FORMALISATION PROCESS



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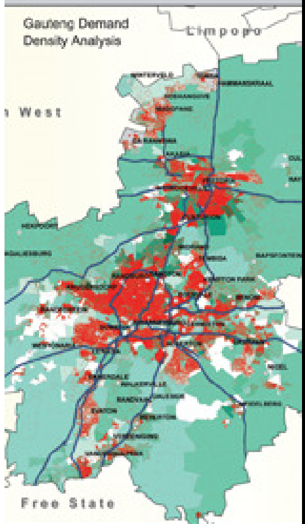

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MERAFONG CITY INDUSTRIAL DEVELOPMENT OPPORTUNITIES

1. Merafong is heavily impacted by mining operations in the region.
2. Limited local beneficiation takes place.
3. Strong service provider function – sub-contractors rendering services to mining industry.
4. Multiple SMME development opportunities.
5. The development of industrial hives and business start-up services could assist the SMME industry.

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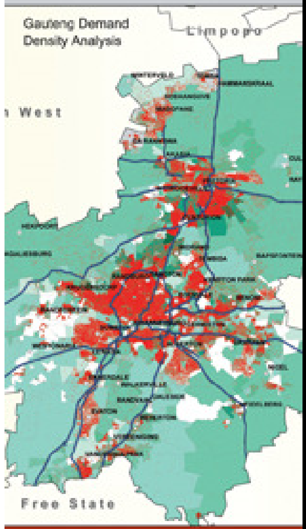

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PROJECT TYPE 3 – SUPPORT PROGRAMMES

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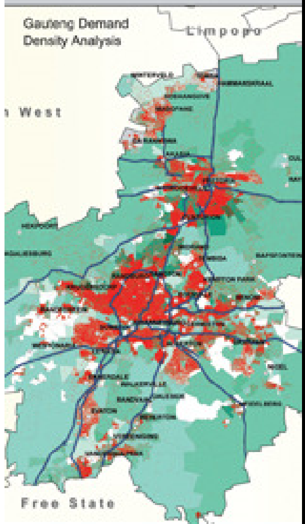

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PROJECT TYPE 3 – SUPPORT PROGRAMMES

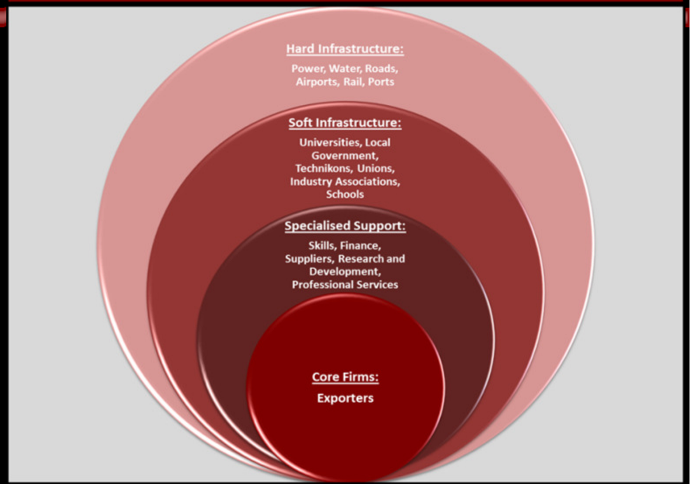
SUPPORT INFRASTRUCTURE

- Convention & exhibition centre
- Hotel
- University / College
- Locality: R28 / Silver Star node
- Development Gap – YES
- Probability - HIGH

INSTITUTIONAL ARRANGEENTS

- Industrial Incentive Policy
- Cluster / Network Programmes
- Industrial Databases
- Skills & learnership programmes

CLUSTER COMPOSITION



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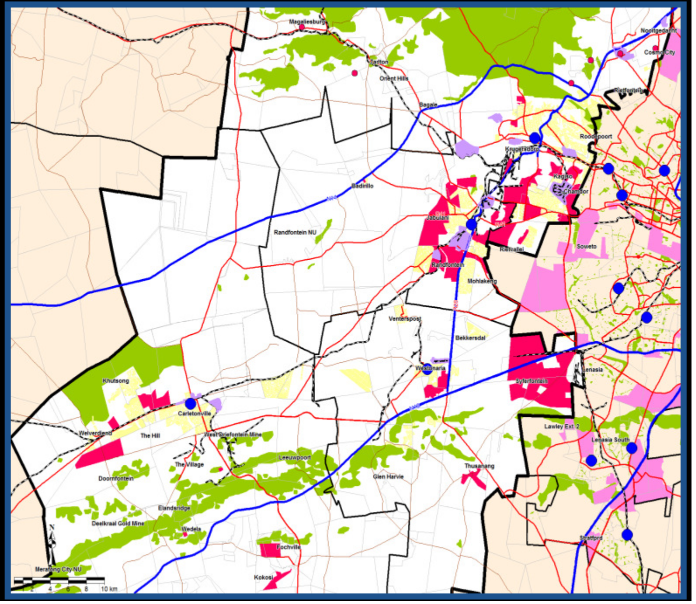

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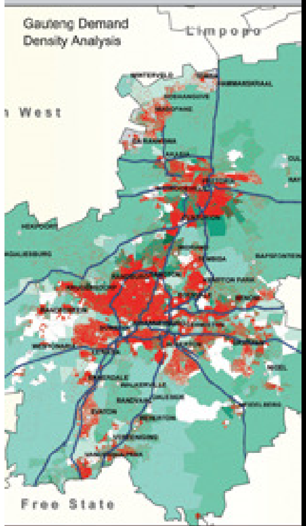

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FACTOR CONDITIONS

PRESSENCE OF HIGH QUALITY SPECIALISED INPUTS

1. **Human resources**
2. **Capital resources**
3. **Physical infrastructure**
4. **Administrative infrastructure**
5. **Information infrastructure**
6. **Scientific and technological infrastructure**
7. **Natural resources**

POTENTIAL PROJECTS

1. Develop an Industrial Representative Forum
2. Develop and implement an industrial information system
3. Establish a land-use database (monitor land use and allocate vacant land to new industrial projects)
4. Develop an economic performance monitoring system
5. Undertake an industrial skill matching exercise & develop learnership programmes
6. Revitalise industrial areas – implement building upgrade and management programmes
7. Develop infrastructure – land, buildings, services, access roads etc.