

INVEST IN THE NORTH WEST PROVINCE



NORTH WEST
DEVELOPMENT
CORPORATION

ABOUT NWDC



The North West Province is the ideal place for commercial ventures – and the North West Development Corporation guides the way as a valuable business partner.

The North West Development Corporation (NWDC) is an agency of the Provincial Government of the North West Province. It was established to plan, finance, coordinate, promote and carry out the economic development of the North West Province and its people. The NWDC focuses on the fields industry, commerce, finance, mining, tourism enterprise related activities and other business resulting in wealth and job creation while taking cognisance of aims and objectives of the Reconstruction and Development Programme of the Republic of South Africa. It is listed as a Schedule 3D provincial government entity in terms of the PFMA of 1994, Act 01 of 1999.

Vision:

To be the cornerstone of promoting trade, attracting investment, and ensuring inclusive economic growth and transformation in the North West Province.

Mission:

To contribute to the inclusive economic growth and transformation of the North West Province through:

- Industrial development;
- Commercial investment;
- Property development and management;
- Development of sustainable enterprises;
- Trade and investment attraction; and
- Programme management.

Values:

- Fairness
- Focus (Batho Pele)
- Integrity
- Diversity
- Accountability
- Professionalism
- Innovation
- Customer-Oriented

The NWDC's strategic thrust is to drive an inclusive strategy towards economic growth and transformation in the Province in line with the Provincial priorities.

The NWDC's purpose is to contribute towards the growth and transformation of the economy by positioning the North West Province as a competitor in the SADC Region, Africa and the globe in investment attraction.

The NWDC aims to demonstrate its leadership by implementing key programmes and providing support for the development of key sectors of the economy in line with the conventional economic and industrial policies of the Province.

Key strategic programme

- SMMEs and corporative development (financial and non-financial support)
- Project management services
- Special Economic Zone (SEZ)
- Property development and management
- Mining
- Agro processing
- Tourism
- Trade and Investment

AFRICA

SOUTH AFRICA



Quick Facts on SA & the North West Province

	NORTH WEST
OFFICIAL NAME	North West Province of South Africa
PROVINCIAL PREMIER:	Mr. Kaobitsa Abel Bushy Maape
CAPITAL CITIES:	Mahikeng
POPULATION: Mid 2021	4 122 854(6,9% of South Africa)
AREA km²:	104 882 (8,6% of South Africa)
TOTAL GVA-R (ZAR): Constant 2010 prices (R 1000)	R143 214 624 (5,36% of South Africa)
GVA-R GROWTH: Constant 2010 prices	-8,2% (2020) 6% projection for (2021)
GVA-R PER CAPITA (ZAR):	R34 024
INFLATION: Average for 2020	3.3% (STATSSA)
UNEMPLOYMENT RATE	32,2% (STATSSA Q1 2021)
PRINCIPAL LANGUAGES	Setswana, English, Afrikaans
MAJOR CITIES AND TOWNS	Rustenburg, Brits, Mahikeng, Tlokwe, Matlosana and Vryburg
AIRPORTS	Mahikeng and Pilanesberg
RAINFALL	400 – 700 mm per annum
INFRASTRUCTURE	<ul style="list-style-type: none"> • Extensive road, rail and air network • Water • Electricity • Telecommunications • Residential & commercial space • Health care • Higher educational facilities • Convention and exhibition venues
(Source: IHS Markit; Regional eXplorer 2142 (2.6p) July 2021 (2020 Figures))	

North West Provincial Districts

Bojanala Platinum District
Dr Kenneth Kaunda District
Dr Ruth Segomotso Mompoti District
Ngaka Modiri Molema District

North West Key Economic Indicators compared to South Africa

The table that follows on the next page summarises the key demographic and socio-economic characteristics for the NWP and its four district municipalities' in context of the South African picture with regards to demographics, development, household infrastructure, labour, income and expenditure, economy, tourism and international trade as per the 2019 IHS Global Insight Indicators.

The NW region covers approximately 104 882 square kilometres, comprising 8.6% of the national area. The NWP is not densely populated when compared to the national population density. The NWP houses approximately 7,0% of the country's total population.



KEY INDICATORS: South Africa, North West Province and NW District Municipalities (2019)

KEY INDICATORS: South Africa, North West Province and NW District Municipalities (2019)

(Source: IHS Markit: Regional Explorer, 19/23/2020 October 2020)							
		SA	North-West	Bojanala DM	Ngaikga Modiri DM	Dr Ruth Sese-motse Mmopoti DM	Dr Kenneth Kaunda DM
Size of Area	(km²)	1 221 246	104 882	18 333	28 114	43 764	14 671
	% Share of Region		8,6%	17,5%	26,8%	41,7%	14,0%
Demographic	Total population	58 985 395	4 141 939	1 848 133	961 960	5 222 406	809 441
	% Share of Region		7,0%	44,6%	23,2%	12,6%	19,5%
	Population Growth rate (%) 2019	1,5%	1,7%	1,9%	1,6%	1,5%	1,6%
Development	Human Development Index (HDI)	0,66	0,63	0,66	0,58	0,55	0,64
	Gini coefficient	0,63	0,61	0,62	0,60	0,59	0,61
	Poverty indicators						
	% People below the food poverty line (StatsSA defined)	29,4%	29,4%	23,3%	35,6%	38,3%	30,2%
	Poverty BPP rate (from upper poverty line)	31,1%	31,4%	31,4%	31,4%	31,3%	31,2%
	Highest level of education matrix only: age 20+	11 308 518	7 444 513	395 471	136 480	6 2398	150 164
	Literate age 15+, completed Grade 7 or higher	85,4%	79,7%	84,1%	74,1%	69,0%	81,9%
	Population density (number of people per km²)	48,30	39,49	100,81	34,22	11,94	55,17
	Urban Population Rate (%)	65,0%	46,8%	39,1%	28,9%	39,3%	90,3%

The NW shows improvement in most of the *developmental indicators* (2009 used as baseline). Most notable is the improvement in the Human Development Index (HDI) currently at 0.63 up 0.52 in 2009. Similar improvements are seen in both the number and percentage of people below the food poverty line (StatsSA defined). Improvements in all measures relating to schooling and education are also reported.

		SA	North-West	Bojane DM	Ngaek Modiri Molema DM	Dr Ruth Segomotsi Mompoti DM	Dr Kenneth Kaunda DM
Household Infrastructure	Share of house hold occupying formal dwellings (2019)	37,3%	34,9%	38,2%	62,4%	73,5%	39,7%
Labour	Number of EAP, official definition	22 824 610	1 390 252	633 470	316 021	132 033	286 706
	EAPs % of total population, official definition	32,7%	33,6%	34,4%	32,9%	29,1%	33,4%
	Unemployment rate, official definition (%)	28,2%	28,8%	34,5%	19,0%	20,8%	31,3%
	Sector's share of regional total (%)	SA	North-West	Bojane DM	Ngaek Modiri Molema DM	Dr Ruth Segomotsi Mompoti DM	Dr Kenneth Kaunda DM
	Agriculture	5,3%	6,3%	3,0%	3,7%	13,0%	7,4%
	Mining	2,8%	14,5%	27,1%	1,7%	2,2%	3,9%
	Manufacturing	10,3%	6,4%	6,9%	5,2%	4,8%	7,2%
	Electricity	0,6%	0,5%	0,4%	0,5%	0,6%	0,7%
	Construction	8,0%	7,0%	6,9%	6,8%	5,9%	8,0%
	Trade	21,6%	19,8%	18,2%	20,6%	20,4%	22,1%
	Transport	0,6%	3,5%	3,1%	3,8%	3,9%	3,8%
	Finance	16,6%	10,5%	9,2%	12,1%	9,9%	12,3%
	Community services	21,3%	23,2%	17,3%	31,6%	26,4%	26,8%
	House holds	7,9%	8,3%	7,8%	9,0%	10,8%	7,6%
	Total	100,0%	100,0%	99,9%	100,0%	99,9%	99,7%
Income & Expenditure	Annual per capita income (Rand, current prices)	60 821	54 137	64 319	41 338	37 081	57 117
	Annual per household income (Rand, current prices)	210 514	178 251	197 168	148 396	132 147	192 168
	Index of buying power	1,00	0,06	0,08	0,01	0,01	0,01

Source: IHS Markit: Regional Explorer 1692 [2.61] June 2019

The *Index of Buying Power* has also increased for the NW province. IHS Global Insight's Index of Buying Power (IBP) indicates that 6% of the country's spending power is located in the NW. Income levels in the NWP are below the national average (which is to be expected for the more rural areas in South Africa). The unemployment rate is slightly higher than that of the national average, while the percentage of people living in poverty is marginally lower than the national average. The NWP has a share of approximately 5.4% of national employment.

The NWP is a large and significant local economy in the South African economic context. North West mining GVA-R contributes approximately (R91,7bn) 33,8% to the total industries GVA (Current prices) in the province and 24,4% to national mining GDP and 14.0% to North West formal employment (122 000 jobs) and 32,7% to national mining employment. (Sources: IHS Markit: Regional eXplorer 1923 (2.6i) October 2020) and Statssa Q2 2020)

		SA	North-West	Bojanala DM	Ngaka Modiri Molema DM	Dr Ruth Segomotsi Mompoti DM	Dr Kenneth Kaunda DM
Economic	Gross Value Added by Region (GVA-R) Current prices (R 1000)	4 523 380 041	271 182 429	143 778 362	31 129 617	19 938 089	34 321 212
	% Share of SA	100,0%	6,0%	53,8%	18,9%	7,4%	20,0%
	Gross Value Added by Region (GVA-R) Constant 2010 prices (R 1000)	2 865 348 448	155 422 366	81 911 482	30 520 005	11 832 808	31 138 267
	% Share of SA	100,0%	5,4%	52,7%	19,6%	7,6%	20,0%
	Average annual growth (Constant 2010 Prices)	0,1%	-0,3%	-0,2%	-0,2%	0,0%	-0,6%
	Sector's share of regional total (%)	SA	North-West	Bojanala DM	Ngaka Modiri Molema DM	Dr Ruth Segomotsi Mompoti DM	Dr Kenneth Kaunda DM
	Agriculture	2,1%	2,3%	0,8%	4,0%	6,8%	3,1%
	Mining	8,3%	33,8%	54,3%	6,8%	8,3%	13,6%
	Manufacturing	13,2%	5,3%	5,4%	5,4%	3,7%	5,2%
	Electricity	3,8%	3,8%	2,6%	6,1%	4,9%	4,7%
	Construction	3,8%	2,5%	1,7%	3,2%	4,0%	3,5%
	Trade	15,1%	11,7%	8,9%	13,7%	15,7%	16,1%
	Transport	9,8%	6,0%	4,3%	8,0%	8,7%	7,7%
	Finance	19,7%	12,3%	9,3%	14,8%	17,3%	16,3%
	Community services	24,1%	22,2%	12,6%	38,0%	30,5%	29,8%
	Total Industries	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
	Gross Domestic Product- GDP (Current prices (R 1000))	5 077 625 041	304 422 579	158 218 397	38 035 042	23 083 984	62 515 130
	% Share of SA	100,0%	6,0%	52,5%	19,4%	7,6%	20,5%
	Gross Domestic Product- GDP Constant 2010 prices (R 1000))	3 148 337 086	171 278 105	88 515 383	34 408 025	13 331 106	35 022 390
	% Share of SA	100,0%	5,4%	51,7%	20,1%	7,8%	20,4%
	GVA-R Average annual growth (Constant 2010 Prices)	0,2%	-0,9%	-1,1%	-0,1%	-0,4%	-1,4%

Tress index	40,78	52,06	66,10	47,49	42,77	44,11
Location quotient	SA	North-West	Bojanala DM	Ngaka Modiri Molema DM	Dr Ruth Segamotse Mompoti DM	Dr Kenneth Kaunda DM
Agriculture	1,00	1,10	0,40	1,89	3,20	1,46
Mining	1,00	4,06	6,52	0,82	1,00	1,64
Manufacturing	1,00	0,40	0,41	0,41	0,28	0,40
Electricity	1,00	1,00	0,68	1,59	1,28	1,22
Construction	1,00	0,67	0,46	0,84	1,04	0,92
Trade	1,00	0,77	0,59	0,90	1,04	1,06
Transport	1,00	0,61	0,44	0,82	0,89	0,79
Finance	1,00	0,63	0,47	0,75	0,88	0,83
Community services	1,00	0,92	0,52	1,58	1,27	1,23
Total Industries	1,00	1,00	1,00	1,00	1,00	1,00

(Source: IHS Markit: Regional Explorer 19/23 (26) October 2020)

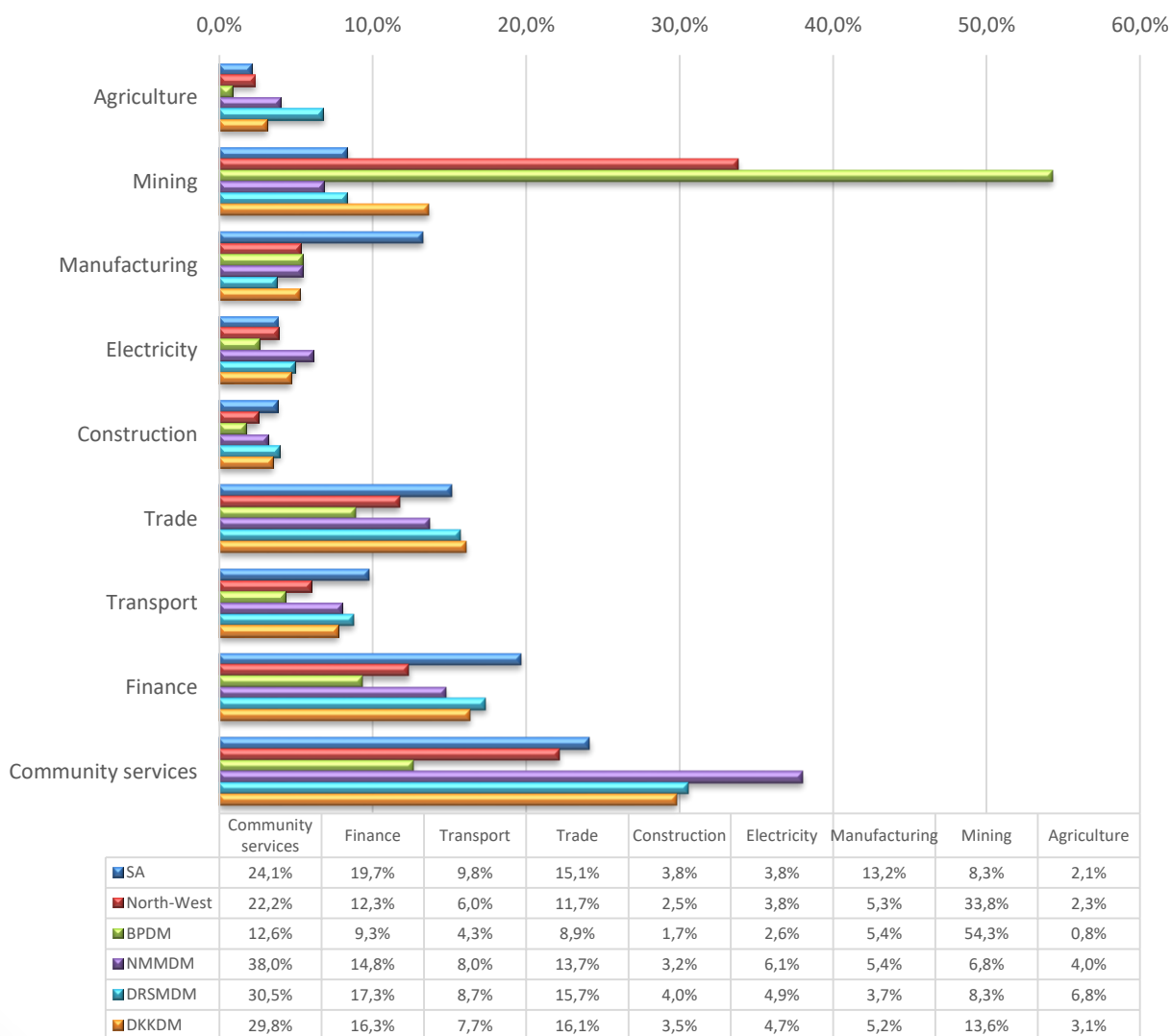
The *Gini coefficient* indicates that the level of equality is decreasing from 0,60 in 2009 to 0.62 in 2018 of the North West province. This is a trend for South Africa and the District Municipalities as well.

With regards to the economy, the *Tress index* provides insight into the level of concentration (or diversification) within an economic region. A Tress index value of 0 means that all economic sectors in the region contribute *equally* to GVA, whereas a Tress index of 1 means that only one economic sector makes up the whole GVA of the region. In the table above it is clear that the NW province is one of the most concentrated economies in the country due to the mining sector.



Figure 6: Sector share contribution of the nine (9) broad economic sectors to the economy of the North West Province and the NW District Municipalities 2019.

GVA-R 2019; Sector's share of regional total (%); Broad Economic Sectors (9 sectors); Current prices (R 1000) (Source: IHS Markit: Regional eXplorer 1923 (2.6i)October 2020)



Total Tourism spend as % of GDP (Current prices) is 4,1% for the North West province but higher in Bojanala at 4,6% where the Pilanesberg Game Reserve is located. It is clear from the 2018 figures that domestic tourism is decreasing and international tourism is increasing. The increase in international Tourism will definitely be adversely affected by the COVID-19 Pandemic as international tourism was restricted.

Table 10: Tourism Statistics 2019

Number of Trips by Purpose of trip	SA	NW	BPDM	NMMDM	DRSMDM	DKKDM
Leisure / Holiday	2 664 310	370 514	262 366	23 774	16 081	60 284
Business	3 112 129	133 292	72 766	17 408	2 042	29 075
Visits to friends and relatives	23 933 080	1 279 573	905 643	395 036	260 012	312 252
Other (Medical, Religious, etc)	3 362 225	152 017	52 925	27 734	23 229	42 008
Total	39 277 734	2 536 408	1 311 762	465 972	307 447	451 221
Number of Trips by Origin of tourist	SA	North-West	BPDM	NMMDM	DRSMDM	DKKDM
Domestic tourists	29 557 239	1 250 521	229 010	374 166	265 462	321 936
International tourists	9 719 295	625 222	422 751	91 207	41 979	129 285
Total tourists	39 277 734	2 536 408	1 311 762	465 972	307 447	451 221
Bednights by Origin of Tourist	SA	North-West	BPDM	NMMDM	DRSMDM	DKKDM
Domestic tourists	92 294 064	5912 974	2 244 371	1 197 121	249 375	1 022 107
International tourists	102 426 632	5 164 526	3 125 032	695 517	315 140	962 270
Total tourists	207 320 742	11 083 560	6 029 429	1 892 632	1 164 515	1 996 977
Total Tourist Spending (R 1000, Current prices)	273 152 377	12 524 130	7 342 069	2 072 134	259 224	2 248 023
2018 Growth in Tourism (using bednights) by origin	SA	North-West	BPDM	NMMDM	DRSMDM	DKKDM
Domestic tourists	-4,5%	-2,0%	-1,5%	-2,5%	-2,4%	-2,5%
International tourists	6,5%	5,1%	5,6%	4,7%	2,7%	4,7%
Total tourists	0,9%	1,2%	2,1%	0,1%	-1,0%	0,9%
Total Tourist spend as % of GDP (Current prices)	3,4%	4,1%	4,6%	3,5%	3,7%	3,6%
Average Tourist spend per resident capita (Rand, Current prices)	4 621	3 024	3 972	2 134	1 646	2 772

Source: IHS Markit: Regional Explorer 1923 p.61 | October 2020 |

Table 11: International Trade Statistics 2019

International Trade	SA	North-West	Bojanele DM	Ngeke Modiri Molema DM	Dr Ruth Segametsi Mompeti DM	Dr Kenneth Kaunda DM
Exports (R 1000)	1 308 144 999	108 472 583	99 697 307	1 578 752	739 251	1 457 273
Imports (R 1000)	1 263 823 998	6 237 964	3 255 797	264 500	183 652	2534 016
Total Trade (R 1000)	2566 968 997	109 710 547	102 953 108	1843 252	922 902	3 991 289
Trade Balance (R 1000)	39 321 000	97 234 619	96 441 510	1 314 253	555 599	-1 076 743
Exports as % of GDP	25,7%	34,0%	62,4%	2,7%	3,2%	2,3%
Total trade as % of GDP	50,6%	36,0%	64,4%	3,1%	4,0%	6,4%
Regional share - Exports	100,0%	7,94%	7,7%	0,1%	0,1%	0,1%
Regional share - Imports	100,0%	0,49%	0,3%	0,0%	0,0%	0,2%
Regional share - Total Trade	100,0%	4,27%	4,0%	0,1%	0,0%	0,2%

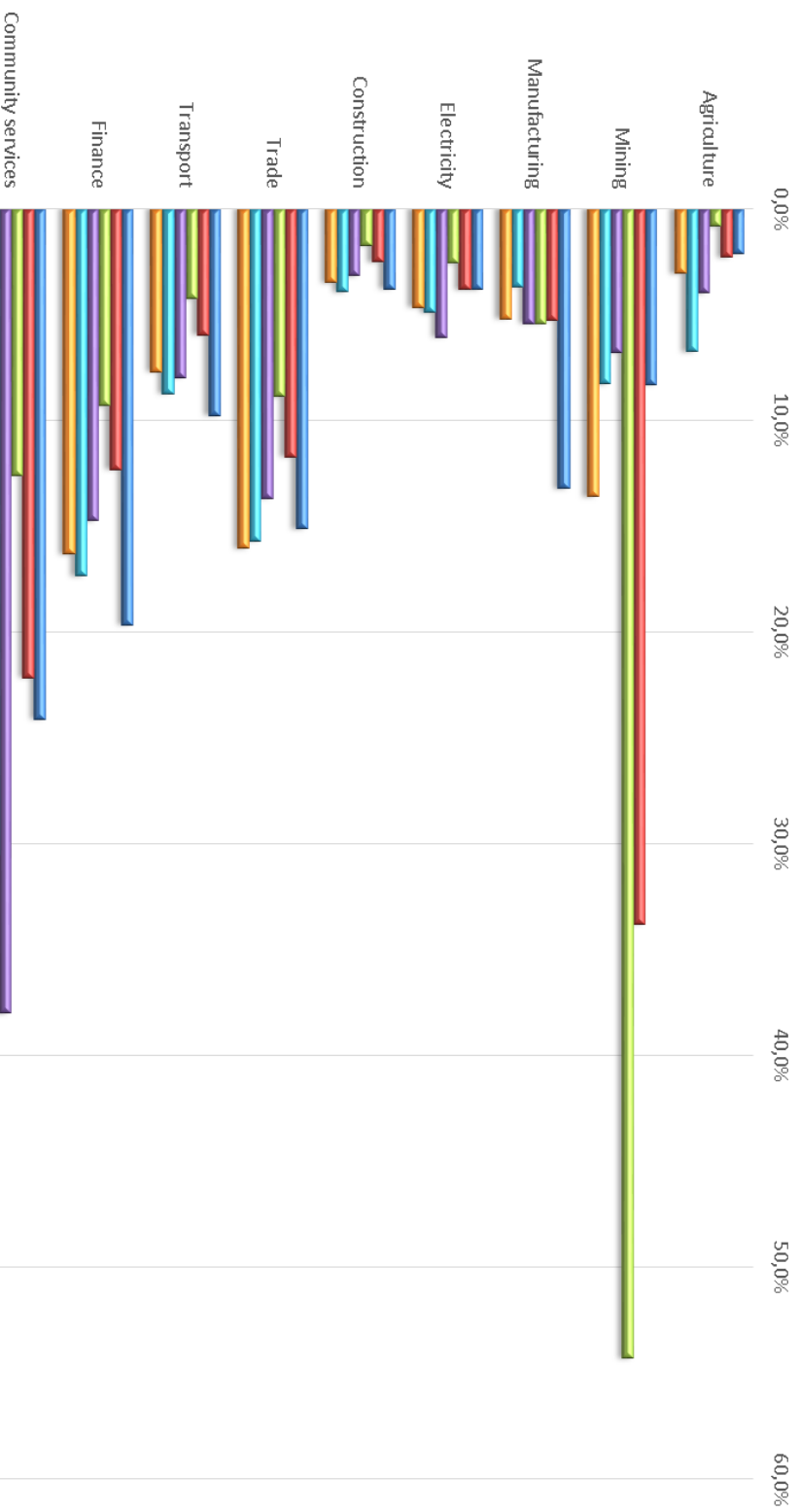
(Source: IHS Markit: Regional Explorer, 19/23 (2.6i) October 2020)

Exports from the Province are low as per the statistics above. This can be attributed to the fact that most of the exporters in the North West have their Head Quarters in other provinces and the exports are recorded there. The province has a healthy positive export balance which indicates more exports than imports. Please see more information in the section on trade.

Compared to 2017, North West exports increased from approximately R24 bn to approximately R88 bn representing 30,3% of the GDP of the North West province, compared to 8.9% in 2017. Imports remained at about R6 bn. R72bn of the exports where from Rustenburg and R11 bn from Madibeng.

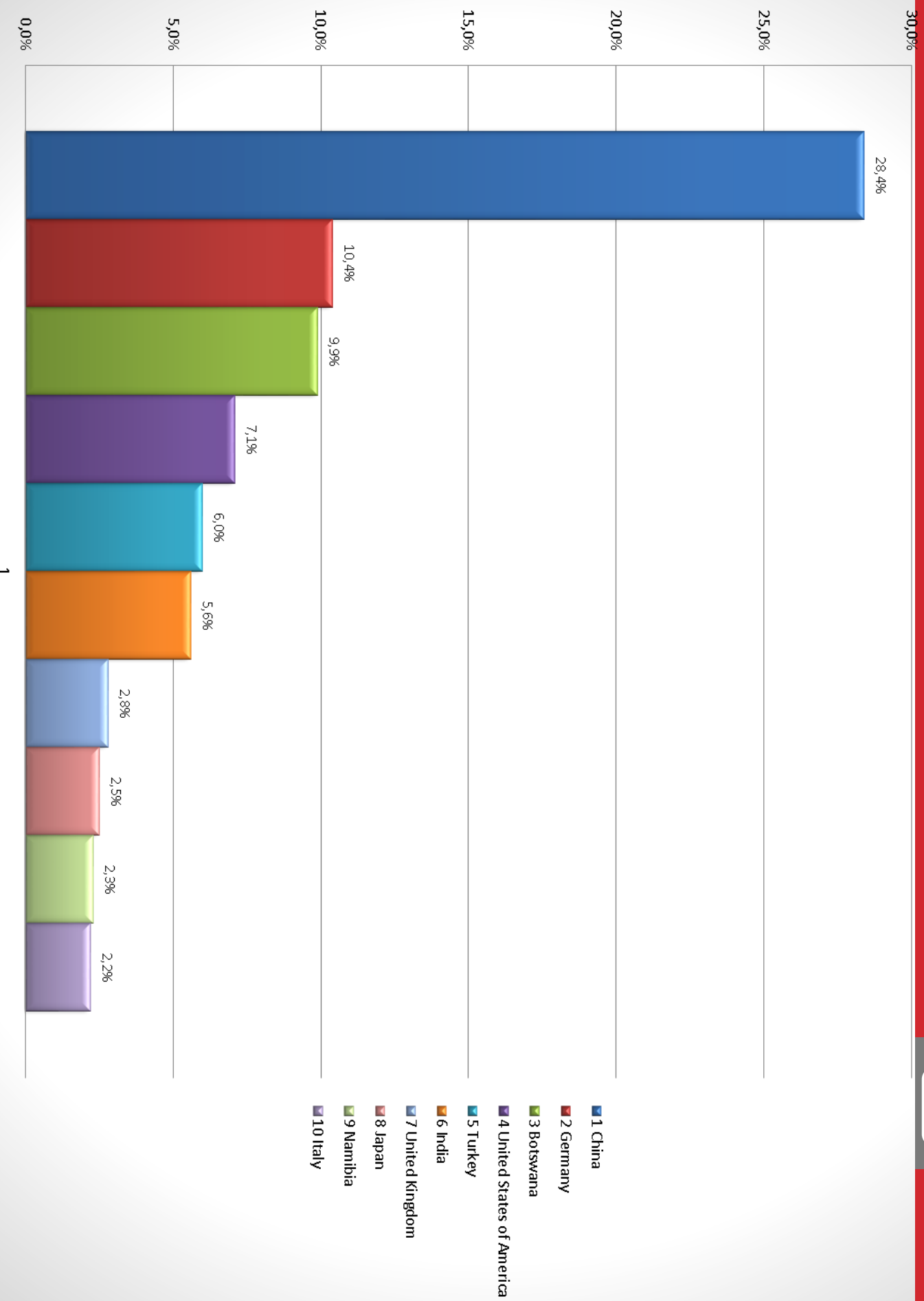


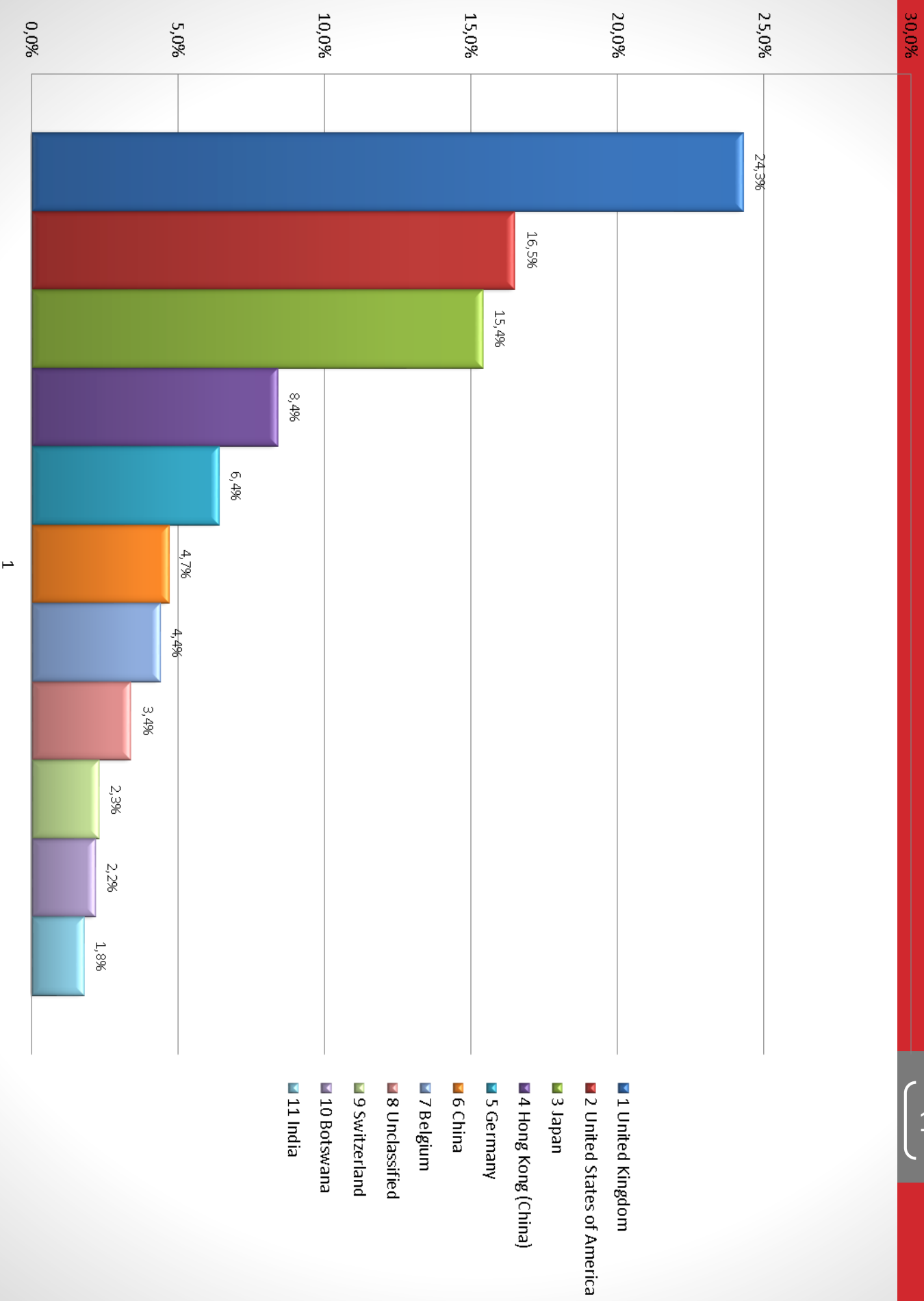
GVA-R 2019; Sector's share of regional total (%); Broad Economic Sectors (9 sectors); Current prices (R 1000) (source: IHS Markit: Regional explorer 1923 (2.6) October 2020)

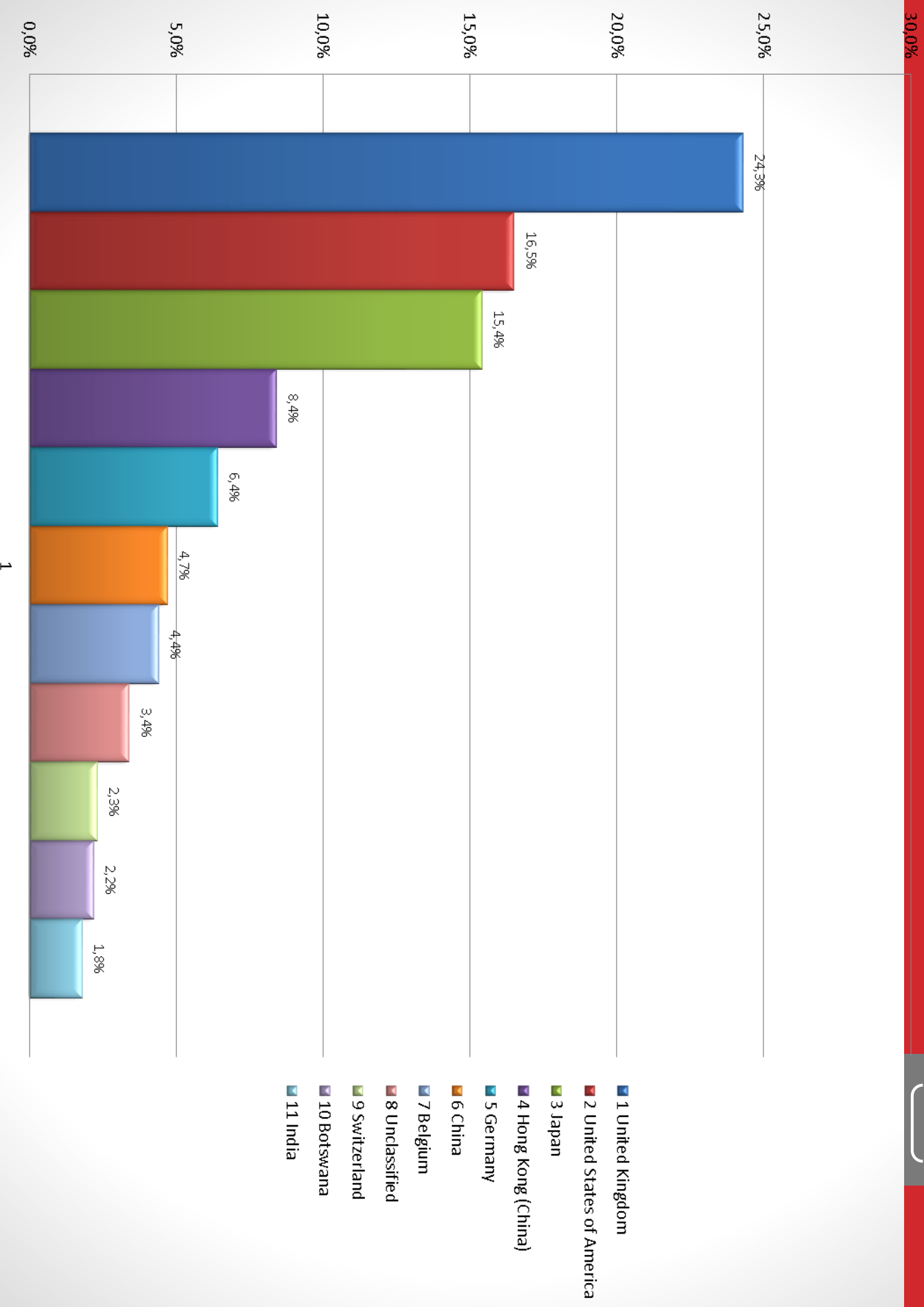


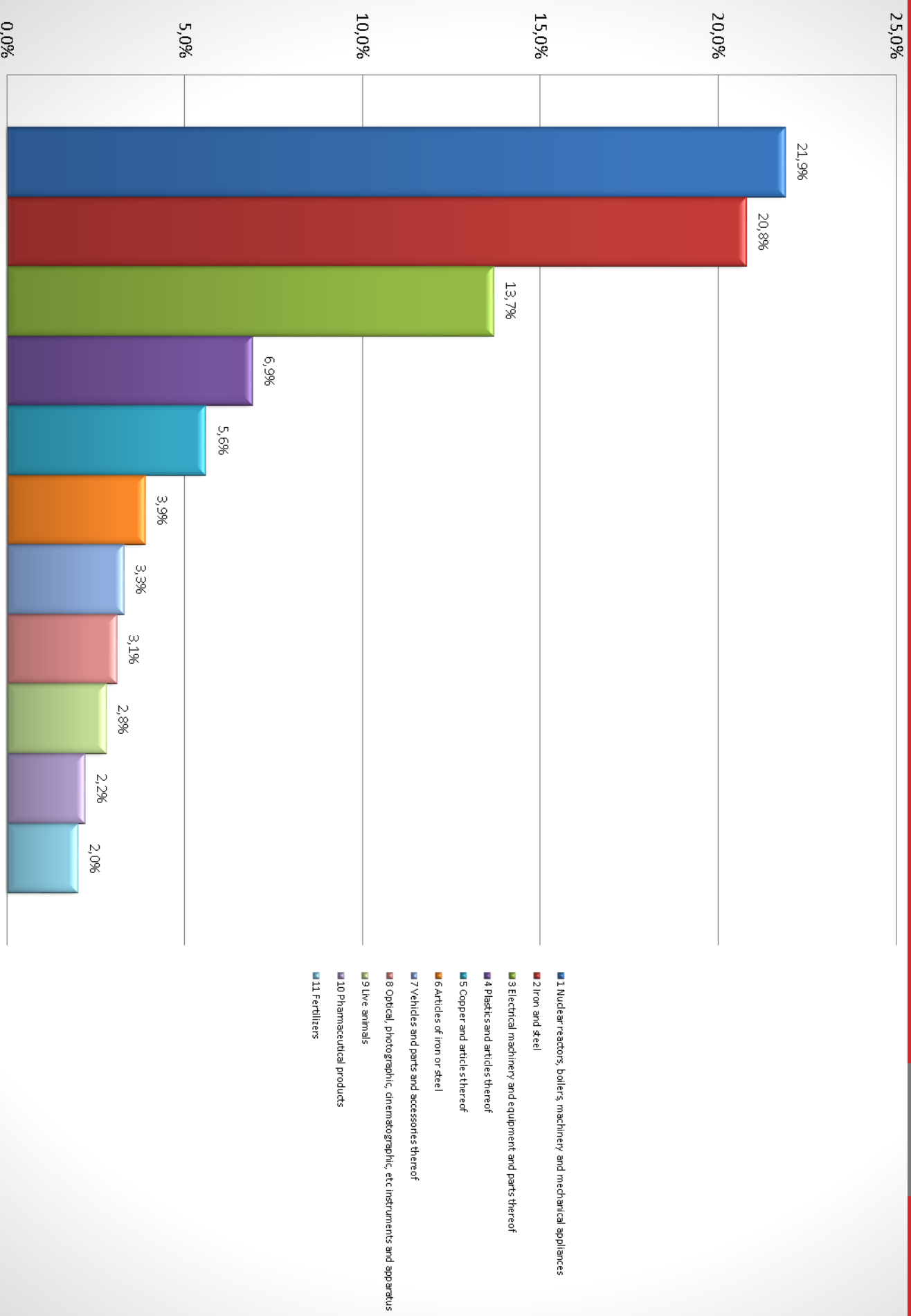
International Trade 2019

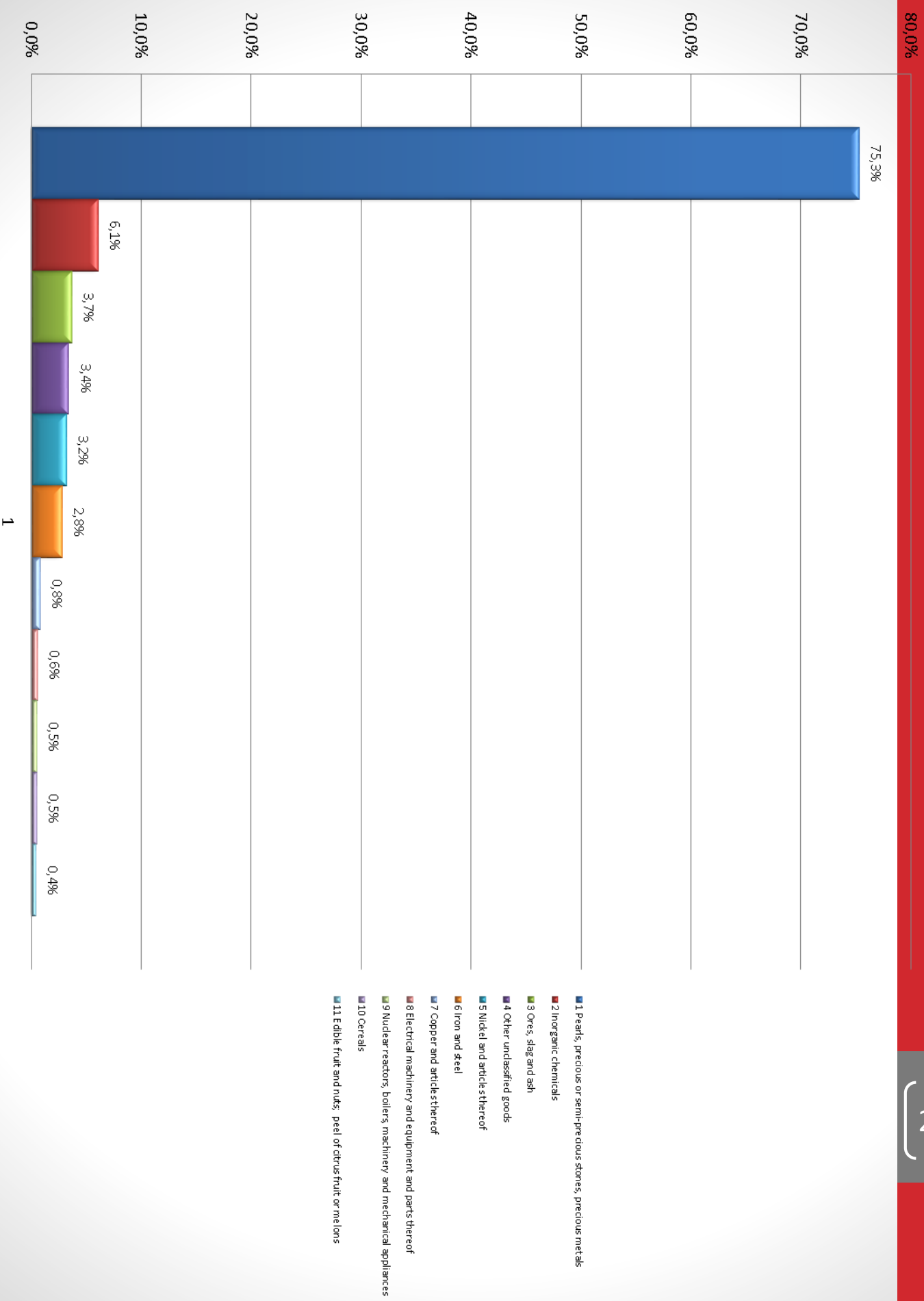
	SA	North-West	Bojanala DM	Ngaka Modiri Molema DM	Dr Ruth Segomotsi Mompati DM	Dr Kenneth Kaunda DM
Exports (R 1000)	1 303 144 999	103 472 583	99 697 307	1 578 752	739 251	1 457 273
Imports (R 1000)	1 263 823 998	6 237 964	3 255 797	264 500	183 652	2 534 016
Total Trade (R 1000)	2 566 968 997	109 710 547	102 953 103	1 843 252	922 902	3 991 289
Trade Balance (R 1000)	39 321 000	97 234 619	96 441 510	1 314 253	555 599	-1 076 743
Exports as % of GDP	25,7%	34,0%	62,4%	2,7%	3,2%	2,3%
Total trade as % of GDP	50,6%	36,0%	64,4%	3,1%	4,0%	6,4%
Regional share - Exports	100,0%	7,94%	7,7%	0,1%	0,1%	0,1%
Regional share - Imports	100,0%	0,49%	0,3%	0,0%	0,0%	0,2%
Regional share - Total Trade	100,0%	4,27%	4,0%	0,1%	0,0%	0,2%









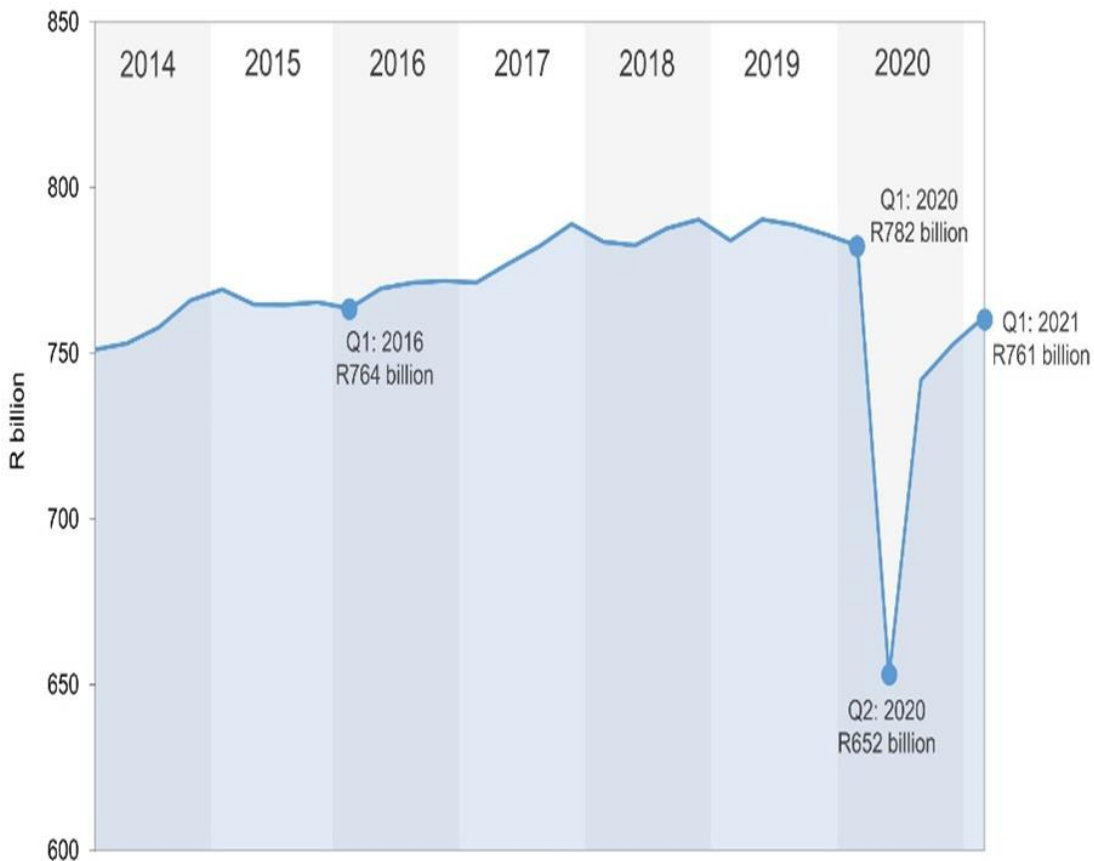


South African GDP Growth Q1 2021

The COVID-19 pandemic and subsequent lockdown restrictions caused significant disruptions to the South African economy. Real GDP was R782 billion in the first quarter of 2020 (January–March).² In the second quarter of 2020 (April–June), when lockdown restrictions were at their most stringent, economic output slumped to R652 billion. Economic activity has increased since then, in line with easing lockdown restrictions, with real GDP rising to R761 billion in the first quarter of 2021.

The COVID-19 pandemic: South African GDP fell to R652 billion in Q2: 2020

Real GDP (constant 2010 prices, seasonally adjusted)



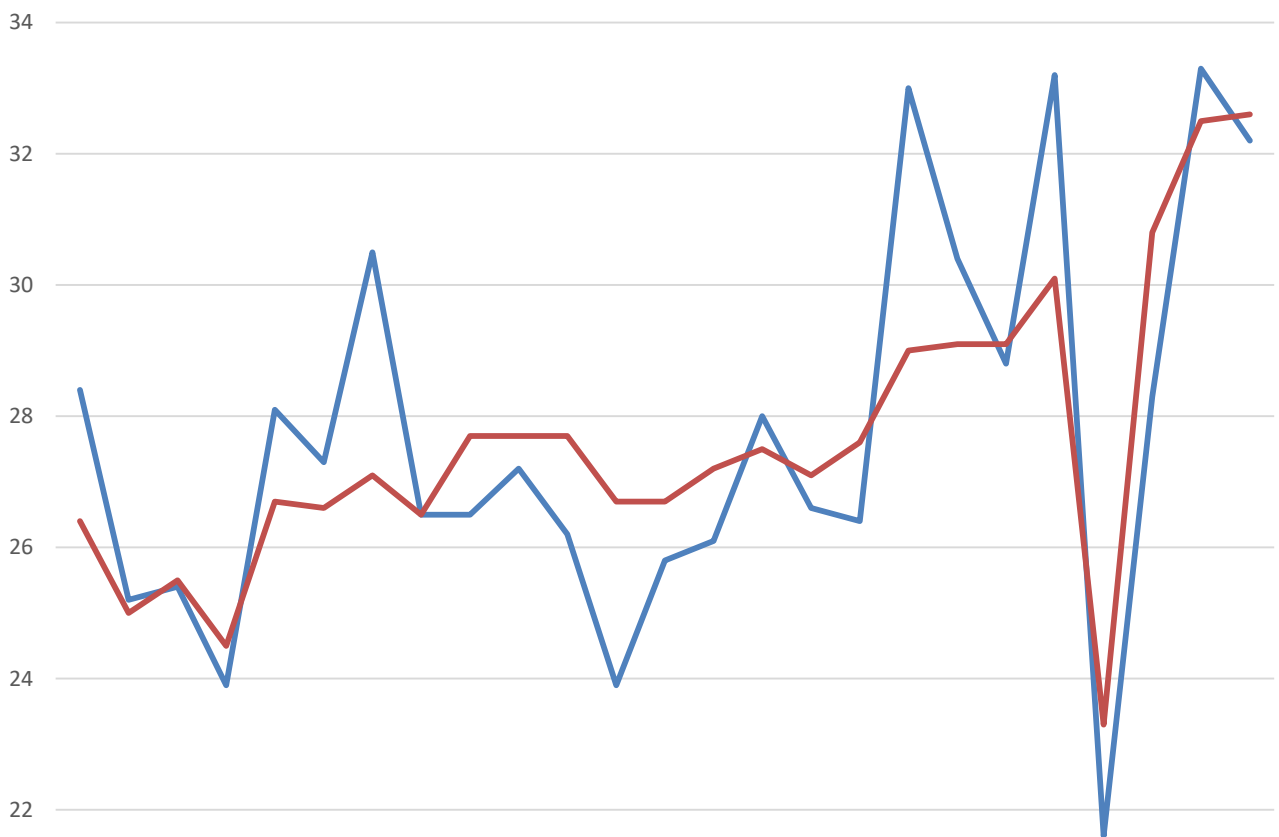
Source: Gross domestic product (GDP), 1st quarter 2021

South African and North West Unemployment Rate

The number of employed persons in South Africa stood at 14.9 million as at Q1 2021 of which 933 000 were employed in the North West Province. The South African population between the ages of 15-64 was 39,4.

South Africa and North West Unemployment Rate

(Source: STATSSA Q1 2021)

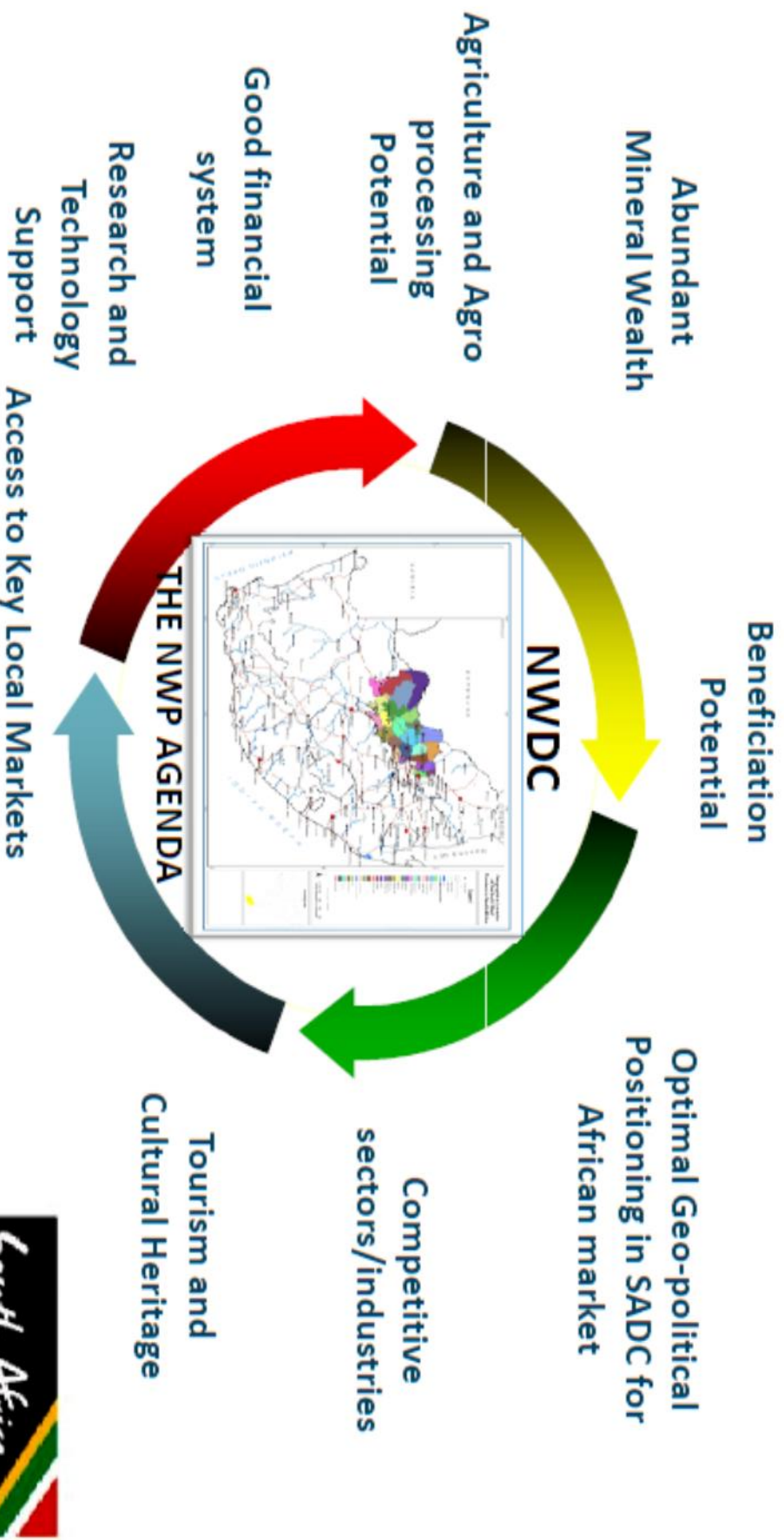


	Jan - Mar 2015	Apr - Jun 2015	Jul-Sep 2015	Oct - Dec 2015	Jan - Mar 2016	Apr - Jun 2016	Jul-Sep 2016	Oct - Dec 2016	Jan - Mar 2017	Apr - Jun 2017	Jul-Sep 2017	Oct - Dec 2017	Jan - Mar 2018	Apr - Jun 2018	Jul-Sep 2018	Oct - Dec 2018	Jan - Mar 2019	Apr - Jun 2019	Jul-Sep 2019	Oct - Dec 2019	Jan - Mar 2020	Apr - Jun 2020	Jul-Sep 2020	Oct - Dec 2020	Jan - Mar 2021
NW	28	25	25	24	28	27	31	27	27	27	26	24	26	26	28	27	26	33	30	29	33	22	28	33	32
SA	26	25	26	25	27	27	27	26	27	27	27	26	26	27	27	27	28	29	29	29	30	23	31	33	33

Location Quotient 2019 (Source: IHS Markit: Regional Explorer 1923 (2.6i) October 2020)									
	Agriculture	Mining	Manufacturing	Electricity	Construction	Trade	Transport	Finance	Community Services
NW	1,10	4,06	0,40	1,00	0,67	0,77	0,61	0,63	0,92
District Municipalities									
BPDM	0,40	6,52	0,41	0,68	0,46	0,59	0,44	0,47	0,52
NMMDM	1,89	0,82	0,41	1,59	0,84	0,90	0,82	0,75	1,58
DRSMDM	3,20	1,00	0,28	1,28	1,04	1,04	0,89	0,88	1,27
DKKDM	1,46	1,64	0,40	1,22	0,92	1,06	0,79	0,83	1,23
Local Municipalities									
BPDM									
Moretele	0,32	0,28	0,80	2,39	0,92	1,21	0,88	1,12	1,03
Madibeng	0,67	4,05	0,74	0,76	0,68	0,80	0,67	0,62	0,77
Rustenburg	0,18	9,39	0,15	0,26	0,22	0,30	0,21	0,27	0,24
Kgetlengrivier	0,40	9,33	0,14	0,20	0,26	0,30	0,27	0,21	0,27
Moses Kotane	0,31	6,10	0,16	1,38	0,43	0,75	0,33	0,52	0,61
NMMDM									
Ratlou	2,47	0,98	0,25	0,72	0,92	0,83	0,77	0,73	1,76
Tswaing	6,31	0,63	0,42	0,56	0,95	0,94	0,87	0,55	1,51
Mahikeng	0,79	0,39	0,27	1,69	0,77	0,91	0,81	0,87	1,79
Ditsobotla	2,73	1,24	0,82	0,60	1,02	0,89	1,02	0,69	1,24
Ramotshere Moiloa	1,31	1,36	0,36	3,69	0,68	0,94	0,60	0,62	1,34
DRSMDM									
Naledi	3,44	0,41	0,29	0,90	0,88	1,34	1,17	1,10	1,05
Mamusa	4,66	0,96	0,22	1,31	1,51	1,14	0,78	1,00	0,99
Greater Taung	1,04	1,65	0,17	2,12	0,86	0,81	0,72	0,87	1,41
Lekwa-Teemane	4,23	0,62	0,69	0,70	1,27	1,11	0,97	0,73	1,19
Kagisano/Molopo	4,43	1,23	0,16	1,04	1,07	0,78	0,76	0,60	1,63
DKKDM									
City of Matlosana	0,51	2,30	0,31	1,07	0,87	1,12	0,84	0,87	1,07
Maquassi Hills	5,75	1,33	0,41	0,50	1,33	1,03	0,78	0,65	1,17
JB Marks (Tlokweng/Ventersdorp)	2,19	0,71	0,51	1,54	0,94	0,98	0,71	0,80	1,48

The NWP Trade and Investment Environment

Positioning the North West Province for Growth and Development



Bojanala Special Economic Zone

Transforming the Bojanala region into a sustainable beneficiation hub for mineral processing (PGM), capital equipment, renewable energy components and agro-processing.

Why Bojanala SEZ?

Access to Infrastructure

- 88 factories available, 7,2% of total land for SEZ;
- Water volumes available: Vaalkop Dam – 20km from site(160mm pipeline);
- Sewer: 200mm to the existing WWTW;
- Electricity supply: 11MVA current- new substation at Ledig under construction.

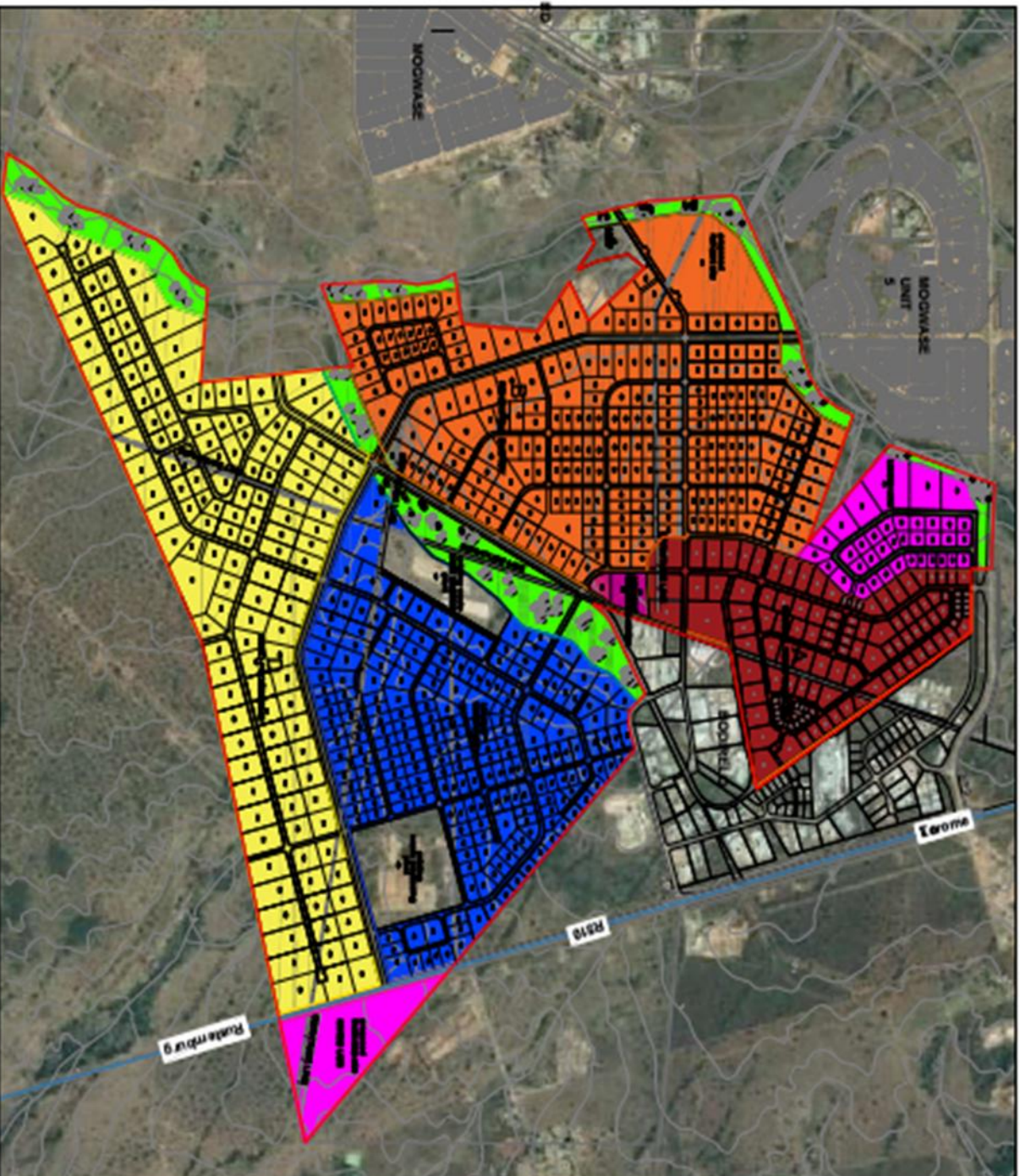
Access to Transport Logistics Infrastructure

- Rail (1km from site with unutilised sidings)- Transnet Freight Rail part of PSC;
- Air (Pilanesberg Airport= 19km);
- Road (along R510 connecting to N4).

Access to Markets

- Platinum group metals is the major product of the mining sector in the North West as the province contributed 40% of world's platinum and 55% of the platinum in the South Africa in 2017.
- The North West province also produces 70% of the dimension stone and granite, 32% of chrome and 20.7% of gold of South Africa. Other minerals produced in the province include diamonds, vanadium, slate, limestone, nickel, silica, manganese, phosphate, fluorspar and zinc.

PROPOSED BOJANALA SEZ – GEOGRAPHIC LOCATION

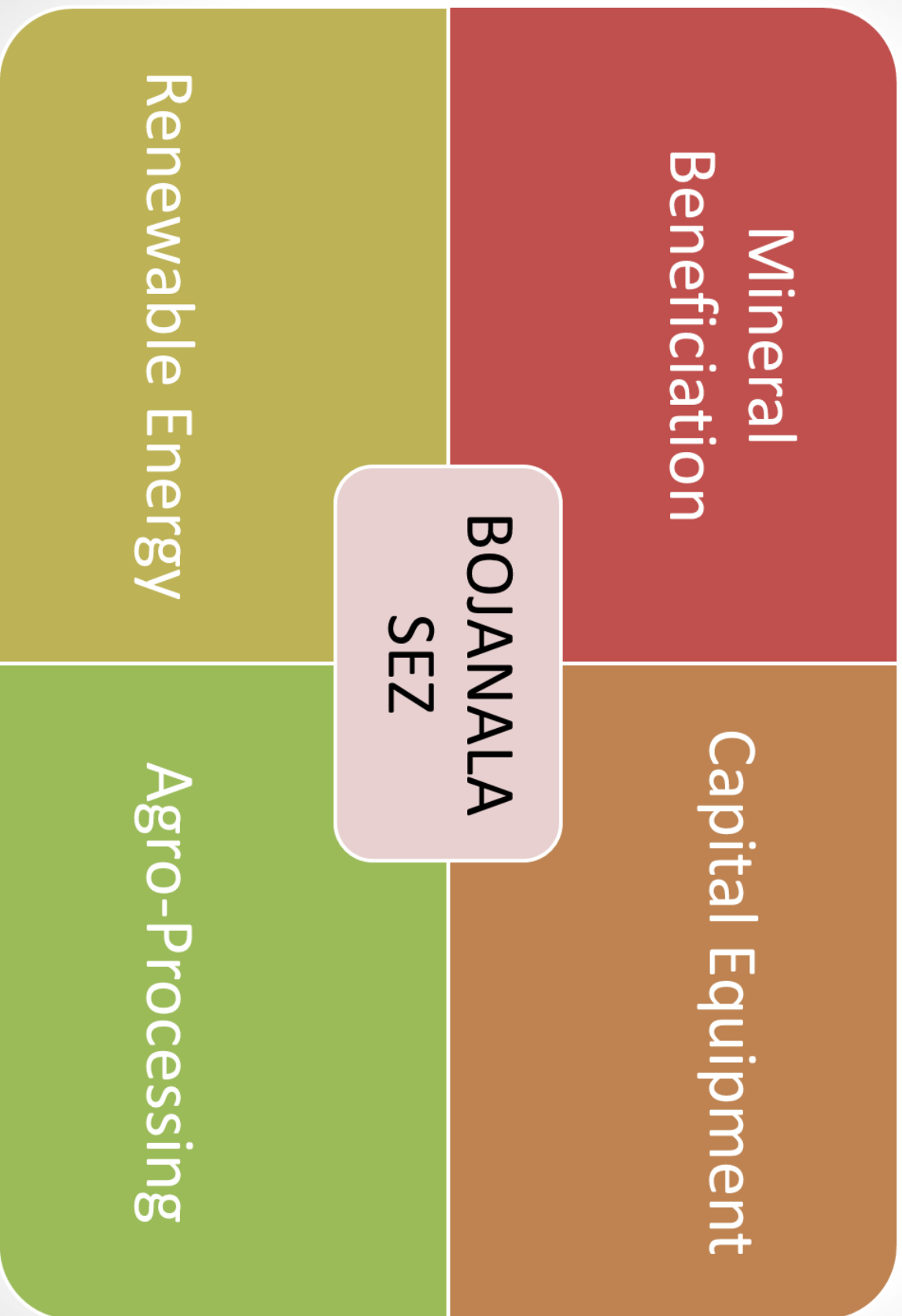


Located at Bodirelo Industrial Park in Mogwase

Mogwase is in Moses Kotane LM – Bojanala District

50km from Rustenburg along R510 road

Sectoral Focus



SEZ Incentives and Benefits for Investors

- Corporate Tax of 15%;
- Accelerated allowance on buildings and improvement to buildings;
- Salaried employees (below R6000) to receive wage allowance;
- Capital allowance – plant and machinery imports;
- Special customs and VAT incentives;
- Retain status for 10 years;
- Sunset clause until 2024.



Trade & Investment Facilitation

The North West Development Corporation Trade & Investment Facilitation assist with the following:

- Facilitating joint venture and equity partnerships;
- Providing information on financing options and investment incentives;
- Providing advice on feasibility studies and business plans;
- Assisting investors to obtain work and business permits;
- Providing assistance in obtaining suitable factory space;
- Assisting existing firms to expand and re-invest;
- Assisting companies to find export markets for their products;
- Advisory services to improve company growth and performance;
- Competitiveness improvement support; and
- Facilitating market access to businesses in the province.



INVESTMENT OPPORTUNITIES



TABLE OF CONTENT

- THE BOJANALA SEZ
- PILANESBERG NATIONAL PARK
- BAKGATLA AND MANYANE RESORT
- RUSTENBURG GATEWAY PRECINCT
- RUSTENBURG MULTI-DIMENSIONAL INTEGRATED LOGISTICAL HUB
- LEEMA COMPUTER MANUFACTURING PROJECT
- GOAT VALUE CHAIN BENEFICIATION OPPORTUNITIES
- MOLOPO NATURE RESERVE
- ORKNEY VAAL
- AQUACULTURE PROGRAMME
- MONONTSHA FEEDLOT
- TAUNG AGRO PROCESSING HUB
- BOSHOEK AND LINDLEYSPOORT
- LINDLEYSPOORT DAM
- PELCHEM SOC LTD
- MOLATEDI DAM
- WITKOP FLUORSPAR MINE (PTY) LTD
- KETLAPHELA PHARMECEUTICALS SOC LTD
- BLACK GRANITE BENEFICIATION
- MAHIKENG AIRPORT DEVELOPMENT
- LETLAMORENG DAM DEVELOPMENT
- GROOT/KLEIN MARICO RIVER
- SPRINGBOKPAN GRAIN VALUE CHAIN 1
- SPRINGBOKPAN GRAIN VALUE CHAIN 2
- MATLOSANA N12 DEVELOPMENT
- GOAT MASSIFICATION

THE BOJANALA SEZ

LOCATION: Mogwase, Moses Kotane Local Municipality

ESTIMATED VALUE: R5 billion

STATUS: Awaiting the licensing of the SEZ by DTI.

OPPORTUNITY DESCRIPTION

The Bojanala SEZ is a Department of Trade and Industry (dti) initiative to drive the industrialization of the Bojanala District Economy from primary production to secondary and tertiary production through manufacturing.

The purpose of the SEZ is to:

- Facilitate the creation of an industrial complex, having strategic national economic advantage for targeted investments and industries in the manufacturing sector and tradeable services;
- Develop infrastructure required to support the development of targeted industrial activities;
- Attract foreign and domestic investment;
- Provide the location for the establishment of targeted investments;
- Enable the beneficiation of minerals and natural resources including platinum and chrome;
- Take advantage of existing industrial and technological capacity, promote integration with local industry and increasing value-added production;
- Promote regional development and new innovative economic activities; and

- Create decent work and other economic and social benefits in the region including broadening of economic participation by promoting small, micro and medium enterprises and co-operatives, and promoting skills and technology transfer. All the above opportunities will be realized in the four key cluster sectors;
- Mineral Beneficiation: smelting of platinum & chrome, platinum beneficiation - fuel cells; medical equipment manufacturing and jewelry manufacturing.
- Mining Capital Equipment Manufacturing and Supply: production of various products utilized in mining (rock drill, pipes, valves etc.);
- Renewable Energy: manufacturing of energy storage products including batteries, solar panels and electricity; and
- Agro-Processing: further processing of agriculture crops.



PILANESBERG NATIONAL PARK

LOCATION: Pilanesberg, Moses Kotane Local Municipality

ESTIMATED VALUE: R155 million

STATUS: Feasibility completed and investors sought to drive the project.

OPPORTUNITY DESCRIPTION

The development of new mid-market resort on the perimeter of Pilanesberg National Park. The mid-market to up-market resort would fulfil current market needs (both foreign and domestic). The proposed resort to be developed on the immediate periphery of the park with an inclusion of a recreational resort.

BAKGATLA & MANYANE RESORTS

LOCATION: Pilanesberg, Moses Kotane Local Municipality

ESTIMATED VALUE: R58 million

STATUS: Feasibility completed and investors sought to drive the project.

OPPORTUNITY DESCRIPTION

Redevelopment and expansion of the Bakgatla & Manyane resorts. The project includes:

- Revamping of existing self-catering chalets;
- Expansion of self-catering chalets;
- Upgrading camp sites and camping area;
- Redevelopment of the tents & tented area;
- Upgrading or redevelopment of the recreational facilities.

RUSTENBURG GATEWAY PRECINCT

LOCATION: Rustenburg Local Municipality (Bojanala DM)

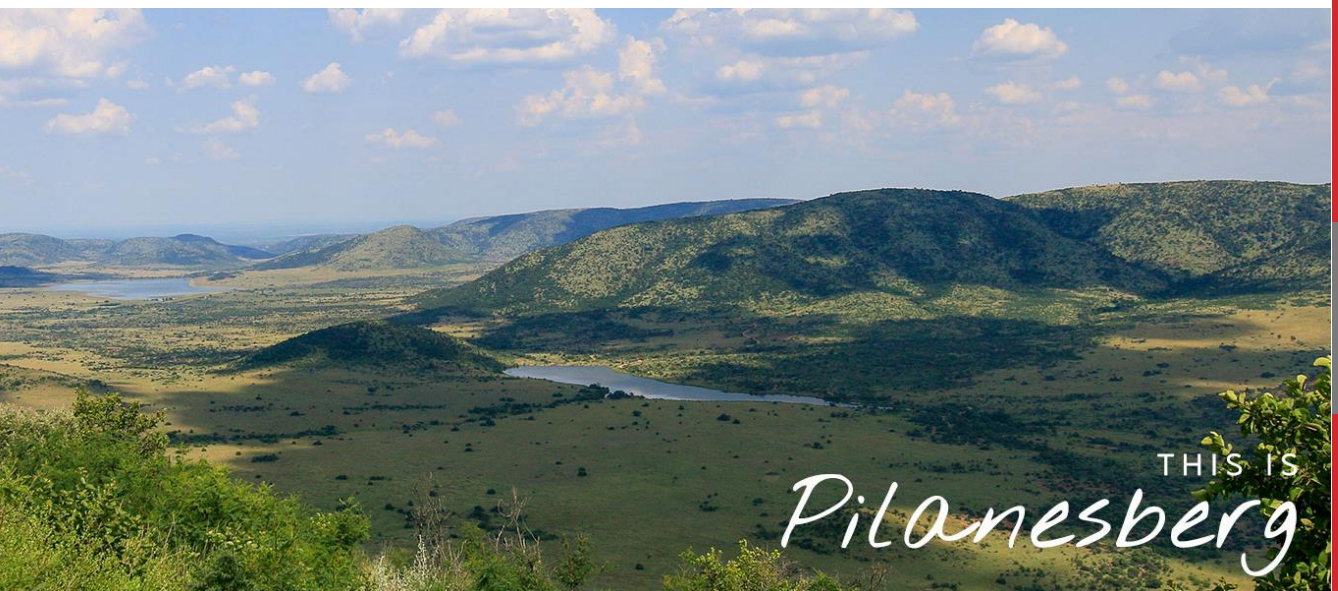
ESTIMATED VALUE: R 2 billion

STATUS: Feasibility study and market testing conducted.

OPPORTUNITY DESCRIPTION

International African Convention Centre and Hotel including some office and retail space, This is planned to be at Kgaswane Game Reserve. The IACC will be adjacent to the Civic Centre, Paul Bodenstein Park as well as the Visitor Information Centre and Rustenburg Show Grounds.

Feasibility studies and Market Testing have been conducted. This will be supplemented by the hotel as well as retail space and small offices. There have also been feasibility studies conducted to transform the Visitor Information Centre into a Trade and Investment Development Centre. This centre will offer state of the art office space with boardroom facilities.



RUSTENBURG MULTI- DIMENSIONAL INTEGRATED LOGISTICAL HUB

LOCATION: Rustenburg Local Municipality (Bojanala DM)

ESTIMATED VALUE: R 150 million

STATUS: Feasibility study and business plan available.
Investment is sought.

OPPORTUNITY DESCRIPTION

A multi-dimensional and integrated logistical hub is proposed to be developed at Rustenburg, which provides amongst other investment opportunities the following:

- Development of an inland Logistical Hub that interconnects all modes of transport (road, rail and airport) at the project site;
- The strengthening and expansion of road, rail and airport infrastructure to support interconnectivity is required;
- Warehousing and logistics centre will be a multimodal freight centre with multiple modes of freight transport providing logistics and distribution companies with the flexibility required to optimise logistics planning on an ongoing basis; and
- A fresh produce market is also proposed at the site.



LEEMA COMPUTER MANUFACTURING PROJECT

LOCATION: Tlhabane Rustenburg Local Municipality

ESTIMATED VALUE: R55 million

STATUS: A group of NWP youth under Leema are seeking technical partners and investing partners to establish ground breaking computer manufacturing in the province.

OPPORTUNITY DESCRIPTION

Leema industries is a high tech manufacturing company, which manufactures computers, laptops, servers and LED lights. The aim is to localize the manufacturing of high tech industries. The project will roll out in 3 phases creating over 280 skilled jobs. The product prototypes have passed the SITA tests and are in the final approval stage with ICASA.



GOAT VALUE CHAIN BENEFICIATION OPPORTUNITIES

LOCATION: Taung and Ganyesa (Dr RSM)

ESTIMATED VALUE: Multiple value chain opportunities

STATUS: Value chain analysis conducted. Multiple opportunities along the value chain identified for which project champions and investors are sought.

OPPORTUNITY DESCRIPTION

Approximately 746 000 goats are located in NW, representing around 11% of the total goats in South Africa (SA). Of this total, close to 13% are Boer goats, 20% Kalahari Red goats and the rest are indigenous goats (DAFF, 2015). These goats are resistant to most tropical diseases and parasites. The perceived resilience of these goats, coupled with the fact that they are indigenous to the country makes them a popular choice for non-commercial farmers in NW.

Investment required to boost Goat Production in the North West province:

- Organising farmers into cooperatives;
- Contract farming;
- Combination farming;
- Capacity building interventions for existing and new goat farmers;
- Investment in cross-breeding through the initiation of cross-breeding programmes;
- Investment in dedicated goat processing facilities;
- Investment to expand downstream production of value added goat meat, milk, cheese and yoghurt products as well as goat skins.

MOLOPO NATURE RESERVE

LOCATION: Tlaskgameng Kagisano Molopo Local Municipality

ESTIMATED VALUE: R160 million

STATUS: Existing facilities, investment sought to optimize the businesses.

OPPORTUNITY DESCRIPTION

This is a 24 000 Hectors Nature Reserve bordering Botswana. It is a hunting destination with potential for free roaming game. An opportunity for investors to develop tourism products within the park. Develop 5 rondavel family units for visitor accommodation. Furthermore developments of safari tents and ablution block.

ORKNEY VAAL

LOCATION: Matlosana Local Municipality

ESTIMATED VALUE: R149 million

STATUS: Investment attraction. Feasibility completed and investors sought to drive the project.

OPPORTUNITY DESCRIPTION

Orkney Vaal Resort is an attractive piece of land on the banks of the Vaal River encompassing an area of approximately 20 hectares with approximately 1km of river frontage. The potential of the resort is considerable like lion lodge, entertainment area, lion park and boating facilities.

AQUACULTURE PROGRAMME

LOCATION: Bloemhof Lekwa-teemane Local Municipality (Dr RSM)

ESTIMATED VALUE: R35 million

STATUS: Investment and technical partners for this project is sought.

OPPORTUNITY DESCRIPTION

This aquaculture opportunity aims to supply fish out-grower plants to entrepreneurs and communities. They also assist clients in the operational management of their plant and supply the fingerlings (baby fish) and feed, to produce high quality protein at affordable prices. Since 1973, the global aquaculture sector has grown at an annual compounded rate of 9.2% per annum and, until 2030, is projected to grow at 3.5% p.a. It is also widely accepted that climate change, over-fishing and pollution are rapidly depleting wild fish stocks worldwide.

- The average annual per capita fish consumption in Sub-Saharan Africa is approximately 8.9kg;
- Almost all tilapia produced in the region is locally consumed, with very limited exports;
- Tilapia is a traditional and favourite dish in almost all countries of SSA;
- The markets are diverse - ranging from small scale/ simple-rural based to more sophisticated commercial distribution chains - small to large retail chains;
- Small-scale traders (especially women) have become more important in the fish distribution chain; and

- Large retail supermarkets are increasingly becoming important - such depots ensures consistent supply of quality product as demanded by large retail chains.

MONONTSHA FEEDLOT

LOCATION: Ipopeng Rustenburg Local Municipality

ESTIMATED VALUE: Multiple value chain opportunities to the value of R25 million. Government has already supported the venture to the value of R6 million

STATUS: Existing project, opportunity exists for expansion Government supported the project to an amount of R2.6 million. The Strategic partner will be responsible for the overall success of the business. Feasibility and Business plan done.

OPPORTUNITY DESCRIPTION

The project is in Ipopeng village 28-35km away from Magaliesburg town. The enterprise is privately owned and specialises in growing superior quality cattle. It is formed by Ipopeng cooperative and Bokone meats (Pty) Ltd. Ipopeng is a cooperative formed by former workers of the feedlot and also the current lessee whereas Bokone Meats is the strategic investor and partner. The enterprise comprises 52 beneficiaries. Bokone Meats will provide a market for all finished and ready to slaughter LSU. The business is envisaged to operate commercially with the assistance of an experienced partner who will advise and mentor the beneficiaries in all their farming and work activities.

Currently the enterprise is having 101 weaners on the feedlot and 221 breeding stock. Other facilities and resources include;

- Feedlot: 70ha: Feedlot and ancillary improvements;
- The property has 15 feedlot pens with a carrying capacity of 19 000 cattle;
- 170ha : dry-land pasture;
- 130ha: arable land; and
- 750ha: veld (natural grazing).

TAUNG AGRO PROCESSING HUB

LOCATION: Taung (Dr RSM)

ESTIMATED VALUE: R25 million

STATUS: This is agro- consolidation and expansion that would lead to beneficiation of primary agriculture products around Taung.

OPPORTUNITY DESCRIPTION

Expected Outcomes:

- Established agro-hub infrastructure in Greater Taung;
- Provision of value adding machinery/equipment or technology for processing;
- Provision of marketing infrastructure to farmers such as storage space for farmers' products, cooling facilities and packaging facilities;
- Provision of basic infrastructure like electricity, roads, water and telecommunication/ICT network;
- High quality fresh produce stock.

BOSHOEK & LINDLEYSPOORT

LOCATION: Lindleyspoort Rustenburg Local Municipality

ESTIMATED VALUE: R50 million

STATUS: Feasibility completed and investors sought to drive the project.

OPPORTUNITY DESCRIPTION

Develop tourism products and attractions (with a nature tourism concept) on the R514 between Boshhoek and Lindleyspoort. The project should be developed into a vibrant tourism hub with a number of tourism recreational, shopping and support services similar to nodes created in Hartebeespoort dam and Hekpoort. This area is in close proximity to Rustenburg as a day visitor destinations, is well located for a stop-over facility for tourists travelling into the NW Eco City Node and as an alternative (more relaxed) route stop over for travellers on the N4.



LINDLEYSPOORT DAM

LOCATION: Lindleyspoort Rustenburg Local Municipality

ESTIMATED VALUE: R205 million

STATUS: Feasibility completed and investors sought to drive the project.

OPPORTUNITY DESCRIPTION

Develop a Resort at Lindleyspoort Dam. The dam creates an opportunity for multiple tourist and recreational activities. The climate, warm winter days and very hot summers, is suited for year-round water related activity such as boating, fishing, canoeing and other water sports. The open and flat landscape in significant portions of the shorelines provides for interesting but accommodating development potential.

PELCHEM SOC LTD

LOCATION: Madibeng (Bojanala DM)

ESTIMATED VALUE: R680 million

STATUS: Concept phase approved. Selected construction /operation site. Concluding a Joint Development Agreement (JDA) with the Industrial Development Corporation (IDC) to develop the project to a bankable business case.

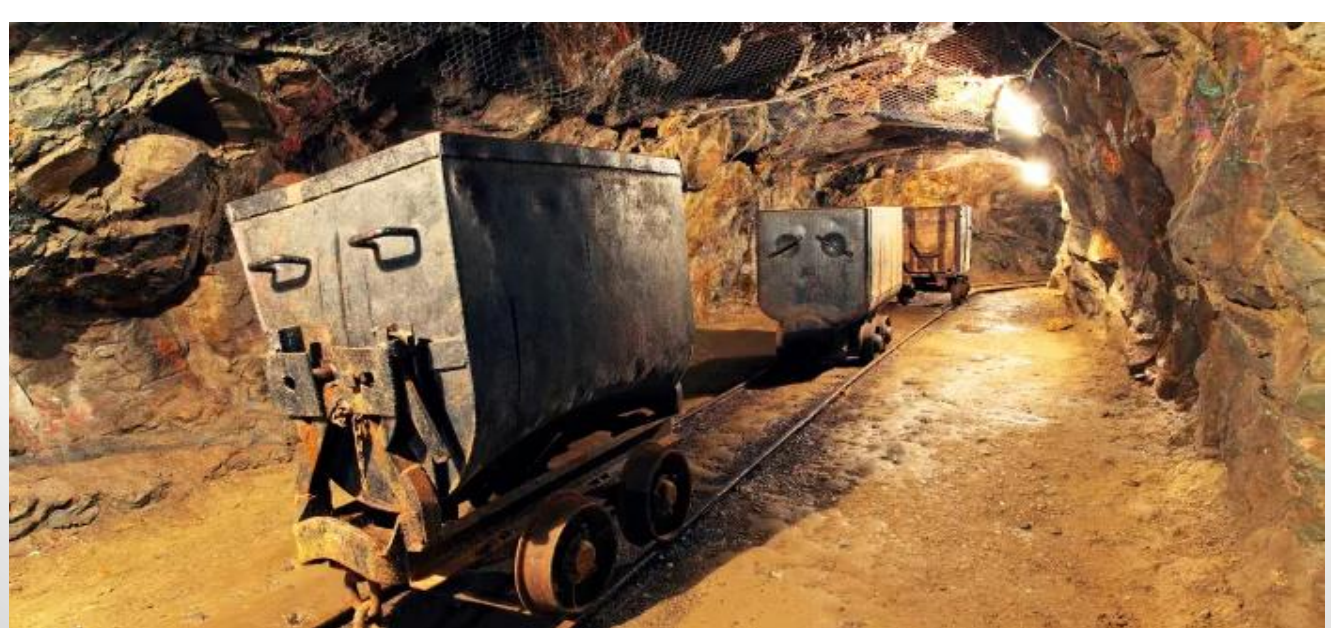
Concluding a Joint Development Agreement (JDA) with Mining entity for Fluorspar off take. In discussions with equity partners for equity stake and market access.

Prefeasibility stage.

OPPORTUNITY DESCRIPTION

Expansion and growth project Thuthukani:

- Government funding institutions in a Joint Development Agreement (JDA);
- Invitation of a Strategic / Technology Partner to form part of the shareholding structure;
- Beneficiation of fluorspar to produce 35 000 tons per annum of Hydrofluoric Acid (HF) and other high value fluorochemicals;
- Identified and main downstream high value products include fluoropolymers (PVDF & PTFE) and refrigerants (HFO);
- Yearly Sales at \$346 million;
- Project Lifespan - 50 years (development phase 6 years);
- Currently at prefeasibility phase;
- 2 more years of development to a bankable business case; and
- Commercial Operation Date - 2024 .



MOLATEDI DAM

LOCATION: Ramotshere Moiloa District Municipality,
Ngaka Modiri Molema District Municipality

ESTIMATED VALUE: R110 million

STATUS: Feasibility completed and investors sought to drive the project.

OPPORTUNITY DESCRIPTION

Develop a resort at Molatedi Dam. The Molatedi dam is a large dam located adjacent and partially incorporated into the Madikwe Game Reserve. It has interesting topography as well as flat shoreline areas, which allows for nature tourism development.



WITKOP FLUORSPAR MINE (PTY) LTD

LOCATION: Zeerust, (NMM District)

ESTIMATED VALUE: R640 million

STATUS: Phase I - development of new process technology (completed)

Phase II -Pilot Plant (scheduled for 2019- cost R20m)

Phase II -Commercialisation (scheduled for 2020 - 2022 - cost R640m).

OPPORTUNITY DESCRIPTION

Witkop Fluorspar Mine (Pty) Ltd. The primary business entails the mining, extraction and refinement of fluorspar from dolomitic ore, whilst simultaneously manufacturing dolomitic lime derivatives towards zero waste generation.

The existing plant and process is inefficient and not economical. A project is currently underway, funded fully from internal resources, to design and pilot a new process that will increase the efficiency of CaF_2 mineral extraction, whilst simultaneously providing a mechanism, using existing as well as added infrastructure, to manufacture value added burnt lime products that have been proven to be of value in the construction, agricultural and cement industries, thus reducing product to waste ratios from the current 1:9 to an estimated 1:3.



KETLAPHELA PHARMACEUTICALS SOC LTD

LOCATION: Madibeng (Bojanala DM)

ESTIMATED VALUE: R6 billion

STATUS: Security of supply for up to 30% of the future ARV first line treatment requirements as well as security of supply of other critical drugs in South Africa.

Stimulation of the local fine chemicals industries for the supply of raw materials and materials and reagents that are currently not available (manufactured) in the country.

OPPORTUNITY DESCRIPTION

Ketlaphela Pharmaceutical SOC Ltd "Ketlaphela" was created in response to the Cabinets, directive for the country to have its own State Owned Pharmaceutical Company. The State Owned Pharmaceutical Company is premised on supplying South African Manufactured Active Pharmaceutical Ingredients (API's) and final formulated medical products mainly for communicable diseases such as HIV/AIDS, Tuberculosis, and Malaria and later non-communicable diseases. The expected outcome of this project will be to set up local manufacturing of APIs in South Africa for essential medicines that creates thousands of jobs, directly & indirectly.



Given the size of the Molatedi dam and the different communities that are affected around the dam, it is recommended that not one large resort but rather a number of smaller developments be considered around the northern towards the west and east shoreline of the dam where it is wider.

BLACK GRANITE BENEFICIATION OPPORTUNITY (DIMENSION STONE)

LOCATION: Barseba Rustenburg Local Municipality

ESTIMATED VALUE: R2.5 billion

STATUS: This is a new opportunity seeking investment along the granite beneficiation value chain.

OPPORTUNITY DESCRIPTION

Black granite resource available from a community in Bojanala seeking to put up a plant within the local community to beneficiate the already existing granite quarrying. Activities within the dimension stone value chain move from quarrying, to block distribution, primary beneficiation (involving sawing and surface finishing of slabs), slab distribution, secondary beneficiation (involving the fabrication of finished goods) and, finally, installation and retail at the end-user stage of the value chain.



MAHIKENG AIRPORT DEVELOPMENT

LOCATION: Ngaka Modiri Molema

ESTIMATED VALUE: R351 million

STATUS: Feasibility and market research studies conducted.

OPPORTUNITY DESCRIPTION

Mafikeng Airport is destined to be developed to be an International Port of entry. Roucomm Systems was appointed to develop, manage and improve the operations at the airport. Amongst investment opportunities, the following are needed:

- Establish an Aircraft Maintenance and Repair Centre;
- Develop a Agri Hub;
- Property development; and
- Aviation Training.

LETLAMORENG DAM DEVELOPMENT

LOCATION: Magogoe Mahikeng Local Municipality

ESTIMATED VALUE: R120 million

STATUS: Existing facility, investment sought to optimize the business .

OPPORTUNITY DESCRIPTION

This opportunity is about the development of a recreation and events centre with the following opportunities: accommodation, conference facility, restaurants, cultural village, recreational and entertainment facilities.

GROOT/KLEIN MARICO RIVER

LOCATION: Groot Marico Ramotshere Moiloa Local Municipality

ESTIMATED VALUE: R38.1 million

STATUS: Feasibility completed and investors sought to drive the project.

OPPORTUNITY DESCRIPTION

The development of adventure activities (team building lodge) on Groot and Klein Marico river. Identified development opportunities for adventure and sport activities as a new direction for tourism in the province and for market expansion. The dams and riverine in the NW Eco Node is relatively underdeveloped and has major potential. The road access around the Groot/Klein Marico river is good with tar roads along both sides of the river. The development of a community adventure trails overnight camps in the Groot Marico Ridges (Linking the existing hiking trails, developing new trails linked to communities).



Springbokpan Grain Value Chain (1)

- This investment opportunity at Springbokpan includes Silo (50 000 tons) which is part of a set of three silos belonging to the Department of Rural Environment and Agricultural Development (READ). The other two silos are Kraaipan (90 000 tons) and Vryhof Silos (90 000 tons). Together they have a total storage capacity of 230 000 tons.
- Springbokpan is the Hub of Ngaka Modiri Molema grain value chain Agri-park with the other agri-parks located in other three Districts. The work at Springbokpan Grain Value Chain Agri-park has been going on for the past three years. This started with the refurbishment of the silos. The construction of milling plant is one of several infrastructure projects that were started for the Agri-park.



Springbokpan Grain Value Chain (2)

The other infrastructures to be constructed at the Agri-park are:

- Inputs Warehouse
- Machinery Warehouse
- Office Park and
- Food bank

The Department of Rural Development and Land Reform has commenced work on the access road and warehouse. Work on the Vryhof and Kraaipan silo refurbishment is planned to commence towards the end of the 3rd quarter of this year. READ is supporting farmers with production inputs to plant a minimum of 13,000ha to support the Grain Silos.



MATLOSANA N12 DEVELOPMENT

North West Province



NEW INVESTMENT: Matlosana N12 Development

Location Aerial View



The Matlosana N12 Development spans some 1 114 Ha on both sides of the N12 Treasure Route Corridor, situated between the mining towns of Klerksdorp and Stilfontein, in the City of Matlosana, DRKK district, North West Province of South Africa. It is a fully integrated mixed-use development.

Goat Massification in the North West

HS020450

Meat of goats, fresh/chilled/frozen

Goat meat is the meat of domestic goats often called chevon

The map demonstrates that there are 146 countries in the world that actually import meat of goat. Based on the DSM model potential demand for goat meat is approx \$76 million. SA imports and export this product but recently exports increased significantly
According to DAFF NWP has 11% of SA Goats



Current Selection Potential Export Markets for: South Africa (ZAF)

Imports & Products:

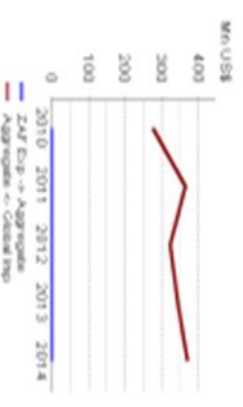
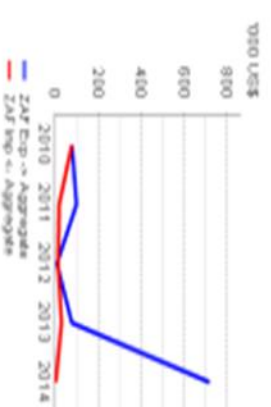
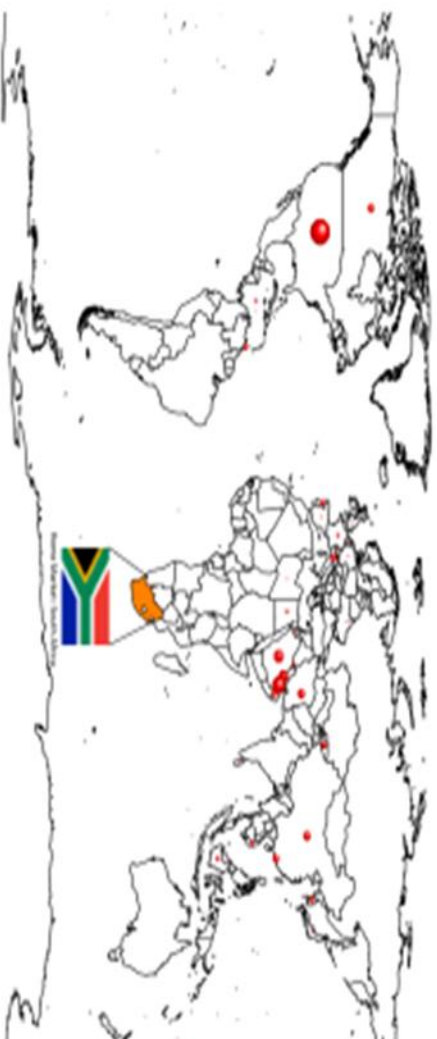
548 x 3

Contributors:

548

Total Potential (2015: 2014)

76.0M



North West Province Tourism : 7 Major Icons

Mahikeng Capital City



Hartbeespoort Dam



Taung Heritage Site



Sun City and Lost City



Madikwe Game Reserve



Vredefort Dome Heritage Site



Pilanesburg National Park





North West Development Corporation



@Invest_NWDC



North west Development Corporation



www.nwdc.co.za



+27 17 422 0067

209 First floor,
Beyers Naude drive,
Rustenburg,
0229