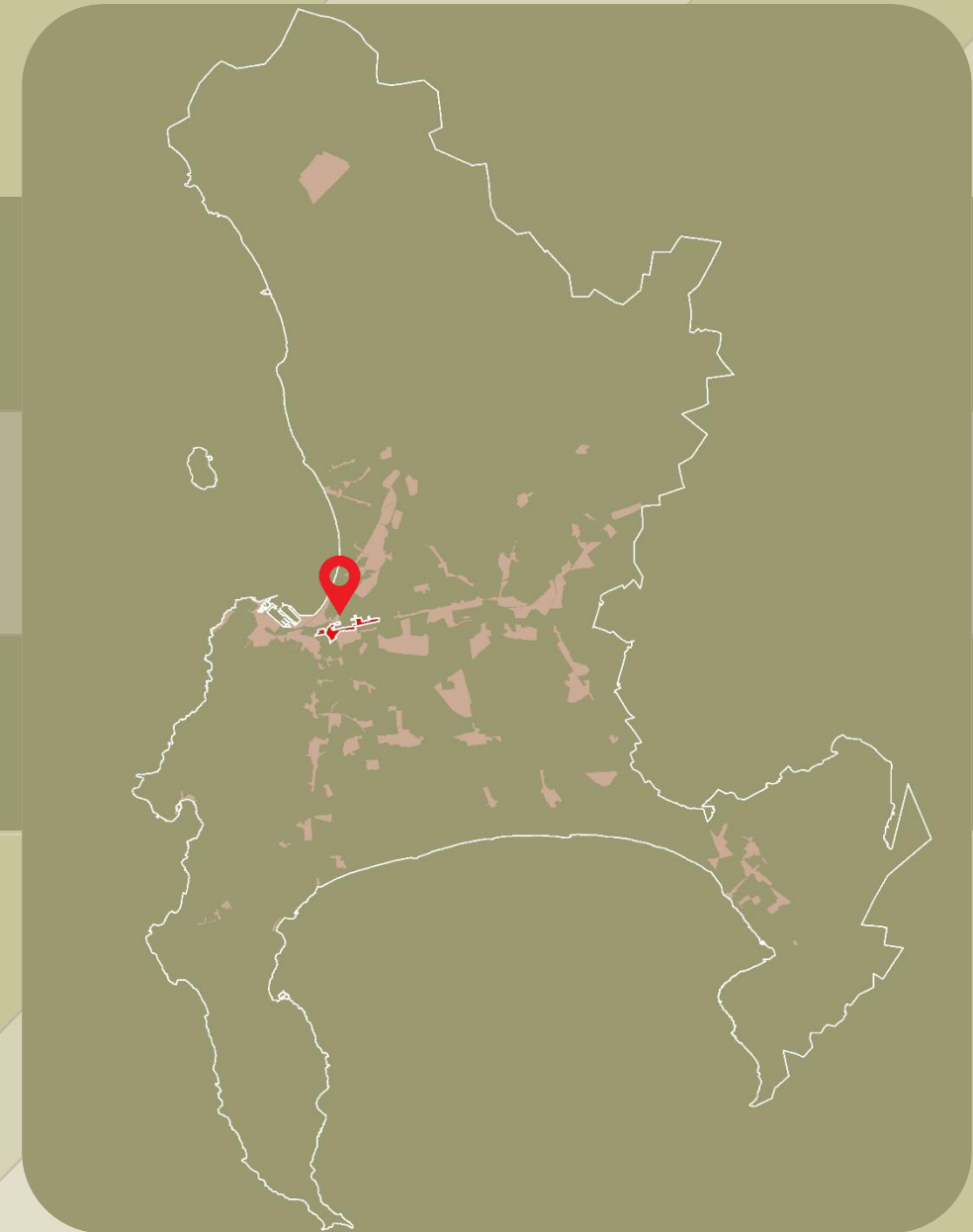


MAITLAND INDUSTRIAL ECONOMIC AREA PROFILE

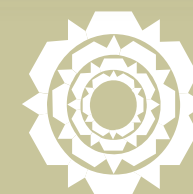
TREND ANALYSIS 2012-2022



Image source: City of Cape Town



June 2025



CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

Making progress possible. Together.

ACKNOWLEDGEMENTS

SPATIAL PLANNING & ENVIRONMENT DIRECTORATE

Executive Director: Spatial Planning & Environment Directorate
Rob McGaffin

Director: Urban Planning & Design Department
Erika Naude

AUTHORS

Metropolitan Spatial Planning and Growth Management
Annelise de Bruin (Manager)
Ashleigh Manyara, Haleem Tambay, Lance Boyd & Obey Vhuma

SUPPORTED BY

Policy and Strategy: Economic Analysis
Paul Court, Kristoff Potgieter & Jodie Posen

Enterprise & Investment
Faith Kolala, Pauline Van der Spuy & Gerschwin Williams

District Planning and Mechanisms
Nigel Titus & team across the 8 Districts

DATA CUSTODIANS

Valuations, Development Management & Policy and Strategy

DISCLAIMER:

The information contained herein is provided for general information only which is not intended to provide definitive answers and as such, is only intended to be used as a guide.

Whilst we strive to provide the best information at our disposal and take reasonable measures to ensure that it is up-to-date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability or availability of information for any purpose. Any reliance you place on the information is at your own risk.



CITY OF CAPE TOWN
ISIXEKO SASEKAPA
STAD KAAPSTAD

POLICY & REGULATORY CONTEXT

For the past decade, the global and national economic context has required regional economies to prioritise their investment decisions in space for greater efficiency. The Economic Areas Management Programme (ECAMP), as it was introduced, has therefore been considered a valuable economic data tool that provides valuable insights into the performance of the space economy at an area-specific level.

This update of ECAMP is further aligned with the Urban Planning & Design Department's business strategy to leverage spatial intelligence to unlock value within Cape Town's space economy by:

- a) Tracking the performance and implementation of its spatial development framework policies
- b) Developing the evidence base to inform and adjust said spatial policy
- c) Supporting spatially targeted investment and decision-making
- d) Providing a spatial lens of economic data within the Cape Town context

The following strategic objectives and programmes support the update of ECAMP:



INTEGRATED DEVELOPMENT PLAN 2022-2027

- [Objective 1](#) (Increased jobs and investment in the Cape Town Economy): Targeted urban development programme
- [Objective 15](#) (A more spatially integrated and inclusive city): Spatial strategy monitoring and evaluation project

INCLUSIVE ECONOMIC GROWTH STRATEGY (2021)

- [Applying an economic lens to policy-making by integrating sustainable analysis into City Decision Making in alignment with the MSDF.](#)
- The primary and most immediate scope of work must centre around economic recovery. To this end, implementation of this Strategy will be in the form of a [three-phase recovery approach](#).

MUNICIPAL SPATIAL DEVELOPMENT FRAMEWORK (MSDF, 2023) POLICY & STRATEGY IMPLEMENTATION

- Table 5.1: Spatial strategy 1: Substrategies and policy guidelines ([Policy 2, 4 and 5](#))
- Table A2: Spatial strategy 1: Policy guidelines, strategic and implementation intent ([Policy 4,2 and 4,3](#))

DISTRICT SPATIAL DEVELOPMENT FRAMEWORK (DSDF, 2023): SUB DISTRICT GUIDANCE

- Table Bay DSDF - Subdistrict 3: Central District:
 - District Development Guidelines ([page 66](#))
 - Subdistrict Development Guidelines ([page 99](#))
 - Consolidated Subdistrict SDF ([Figure 25: Subdistrict 3: Central District](#))

Policy & regulatory context

Conceptual framework

Introduction

Land use activities, employment overview & firm typologies

Development pipeline

Urban land markets

Agglomeration of industries

Market performance

Performance & Potential

CONCEPTUAL FRAMEWORK

Intended users

This profile provides a cohesive narrative to determine key trends across several data entry points to help inform decision-making. It also aims to help guide investment in cases where data is not readily available to the public.

Conceptual Framework

The reporting of updated time series microeconomic analysis on Cape Town's economic areas is informed by a conceptual framework, which aims to create spatial intelligence on *supply & demand factors according to the 5 themes* which have been identified. The 5 themes allow for an integrated narrative across area-based economic trends. The trends being reported throughout this profile are used to classify and assess the overall performance of Cape Town's economic areas.

Data preparation, sources, assumptions and limitations

The indicators reported in this profile feed off several automated data processes to add intelligence at a land parcel level which is then aggregated into economic areas. This profile draws across various datasets between 2012 and 2022 such as the General Valuation Roll, market reports, building plans, land use applications, property sales and SARS data. While many of the respective datasets are continuously refined over time, this profile will be updated as and when new data is available.

Contact details

Should you wish to make contact, please direct your feedback to the City of Cape Town's Metropolitan Spatial Planning and Growth Management branch via Future.CapeTown@capetown.gov.za.

MICRO-ECONOMIC DEMAND & SUPPLY FACTORS

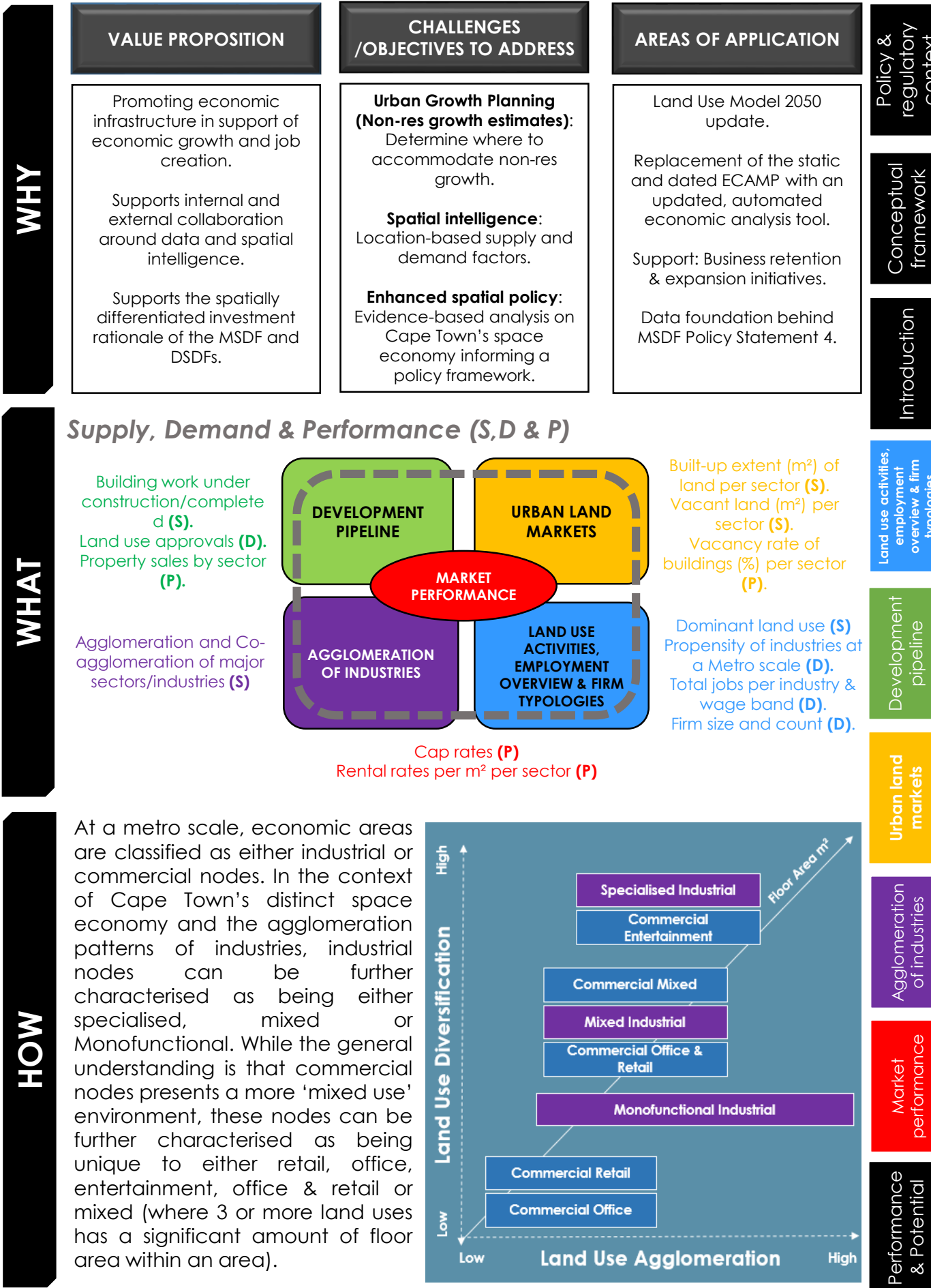
This profile examines a range of micro-economic indicators to highlight trends in supply and demand specific to the economic area. The indicators include:

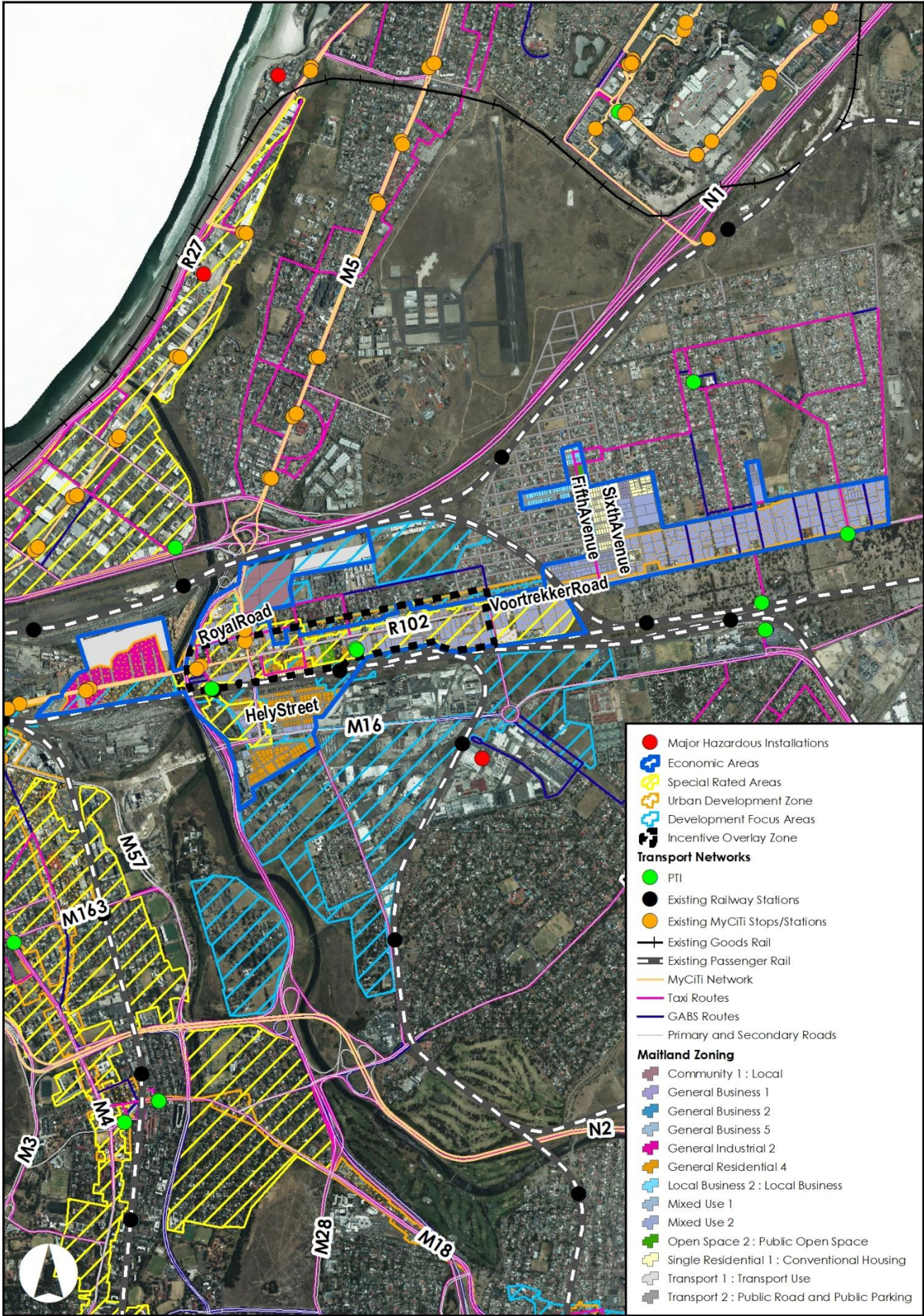
- Property sales per land use sector
- Building work completed
- Types of land use applications approved
- Vacant land per land use sector
- Built-up land and take up rate per land use sector
- Dominant land uses present in an area
- Building vacancy rate overtime
- Capitalisation rate over time
- Rental rate p/m² by land use sector
- Jobs per industry

MACRO-ECONOMIC REPORTS AND INDICATORS

For additional insights into the macro-economic factors affecting the regional economic condition, refer to the following reports for more information on macro-economic indicators related to Cape Town:

- [Economic Performance Indicators for Cape Town](#)
- [Regional Market Analysis and Intelligence 2023/24](#)
- [Provincial Economic Review and Outlook \(PERO\)](#)
- [Municipal Economic Review and Outlook \(MERO\)](#)





MAITLAND

Location

- The area is approximately 8km east of Cape Town's Central Business District and the Port of Cape Town. Furthermore, it is located 15km from Cape Town International Airport.
- It is also situated along Voortrekker Road and near the M5 highway, providing easy access to areas across Cape Town.
- Additionally, it is along a public transport corridor which includes a number of Public Transport Interchanges and is serviced by rail, taxis, GABS and MyCiTi.
- Access to a skilled workforce from surrounding areas, includes the broader Maitland, Pinelands and the wider Cape Town areas.
- Due to its location, the area also attracts a skilled workforce from areas across Cape Town.

Zoning, land use and form

- The area is primarily characterised by a variety of zonings, which include industrial, residential, business and mixed-use purposes.
- In terms of land use, the area is further characterised by light and heavy industrial uses, which include warehousing, depots, retail, office, residential and public amenities/facilities.
- The average land parcel sizes throughout the entire extent of the area range between 500 to 20,000m².

Spatial planning mechanisms

- The area is serviced by a City Improvement District.
- The area has been identified as a Development Focus Area as part of the Table Bay District Spatial Development Framework.
- Parts of Maitland, along Voortrekker Road, are also incentivised as part of the National Treasury's tax incentive ([Urban Development Zone](#)).
- The area also includes an [Incentive Overlay Zone](#).

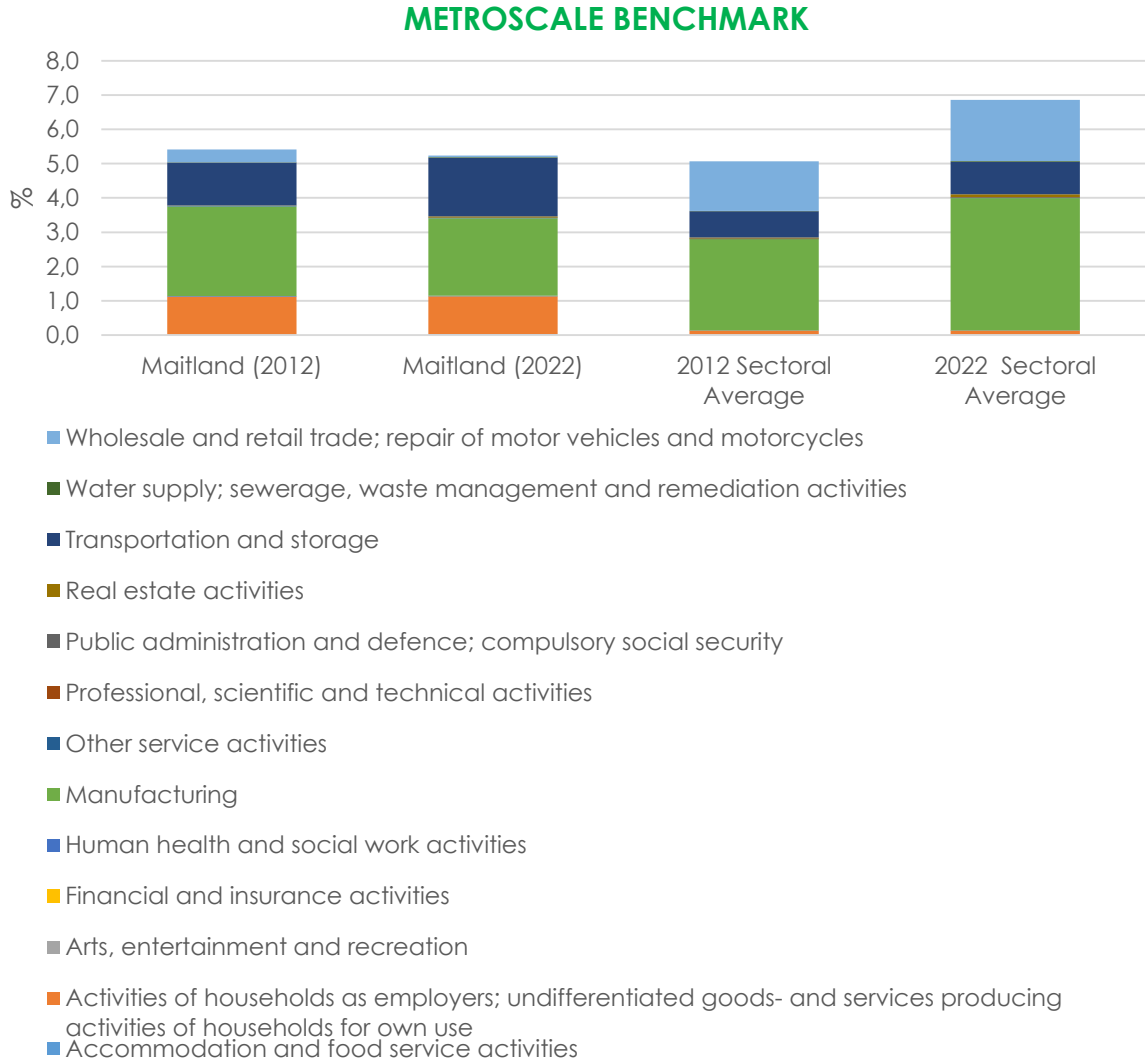
Key highlights of the area include:

- The area started to establish itself from the 1900s and has developed into an industrial economic area.
- It serves as a gateway to the Voortrekker Road corridor, a development route and offers opportunities for urban regeneration, with mixed-use development opportunities.
- Maitland hosts a variety of businesses, including printing companies, engineering firms, media companies, and business administrators.
- The Black River is being used as an asset to create new opportunities and improve access between Maitland and the river.
- The Maitland Local Spatial Development Framework (LSDF) aims to support inclusive economic development and address housing needs in the area, including affordable housing options.

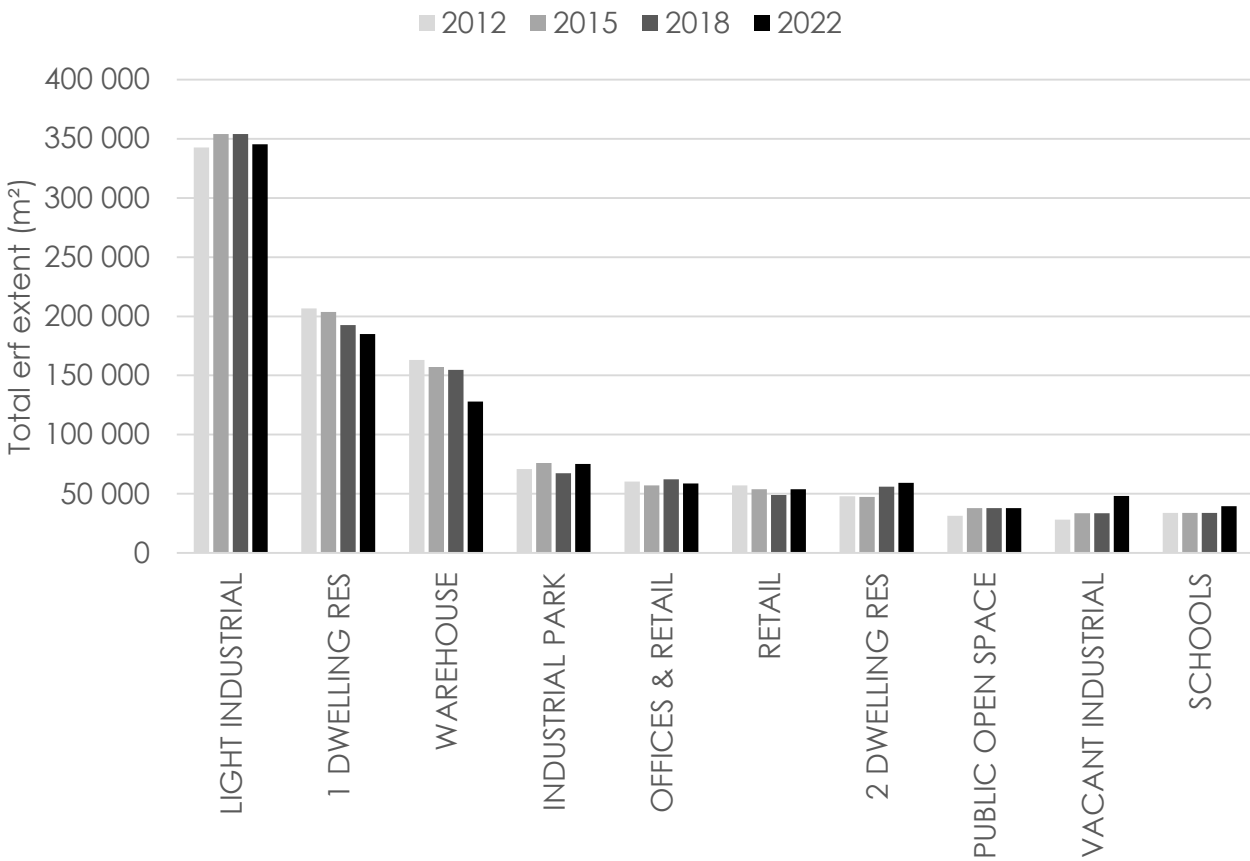
LAND USE ACTIVITIES

A recent analysis involved converting land use codes from the General Valuation Roll (GV Roll) into Standard Industrial Classification (SIC) codes. This was done to determine the prevalence of industries operating in areas with similar characteristics.

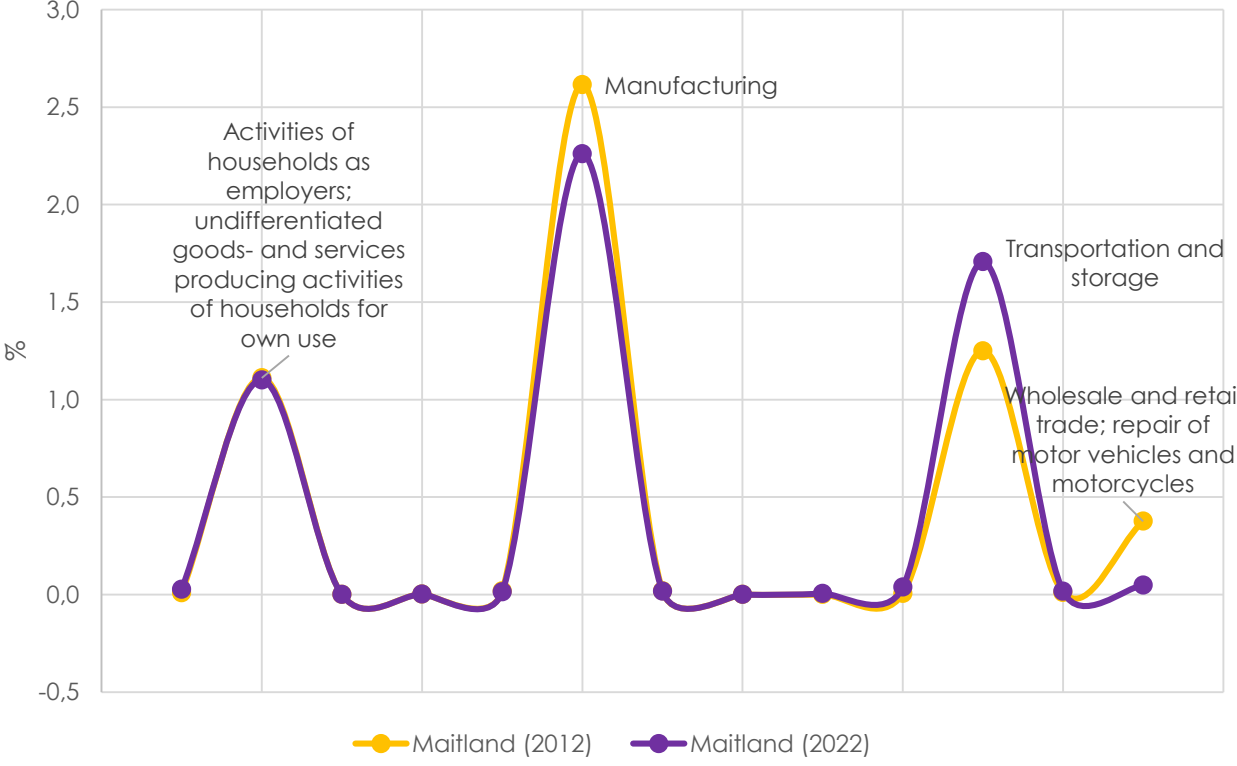
- Between 2012 and 2022, Maitland was mainly characterised by a greater propensity for manufacturing, transport & storage, household activities and wholesale & retail, as indicated by the **Nodal Typology**. This typology highlights the industries with the largest floor area (m²) operating within the economic area.
- The **MetroScale Benchmarking** positions Maitland as a significant contributor to manufacturing, transport & storage and wholesale & retail, which performs lower than the sectoral average, but higher for household activities when compared to other industrial areas across Cape Town.
- Additionally, the GV Roll supports the findings from the SIC data by showing the **dominant land use** over time. It details the cumulative floor area (m²) for light industrial, warehousing, industrial parks, offices, retail and residential.



TOP 10 MOST DOMINANT LAND USES BETWEEN 2012 AND 2022



NODAL TYPOLOGY FOR 2012 AND 2022 (Mixed Industrial)



Source: 2012 – 2022 land use codes converted to SIC codes (May 2024 analysis)

Policy & regulatory context

Conceptual framework

Introduction

Land use activities, employment overview & firm typologies

Development pipeline

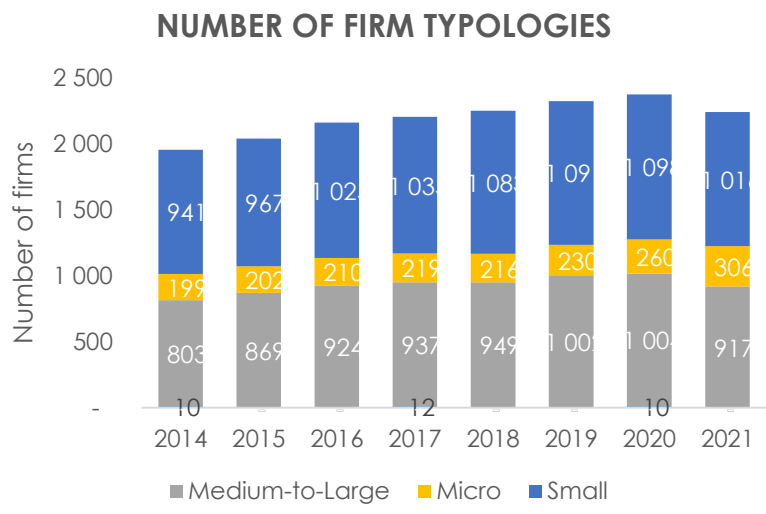
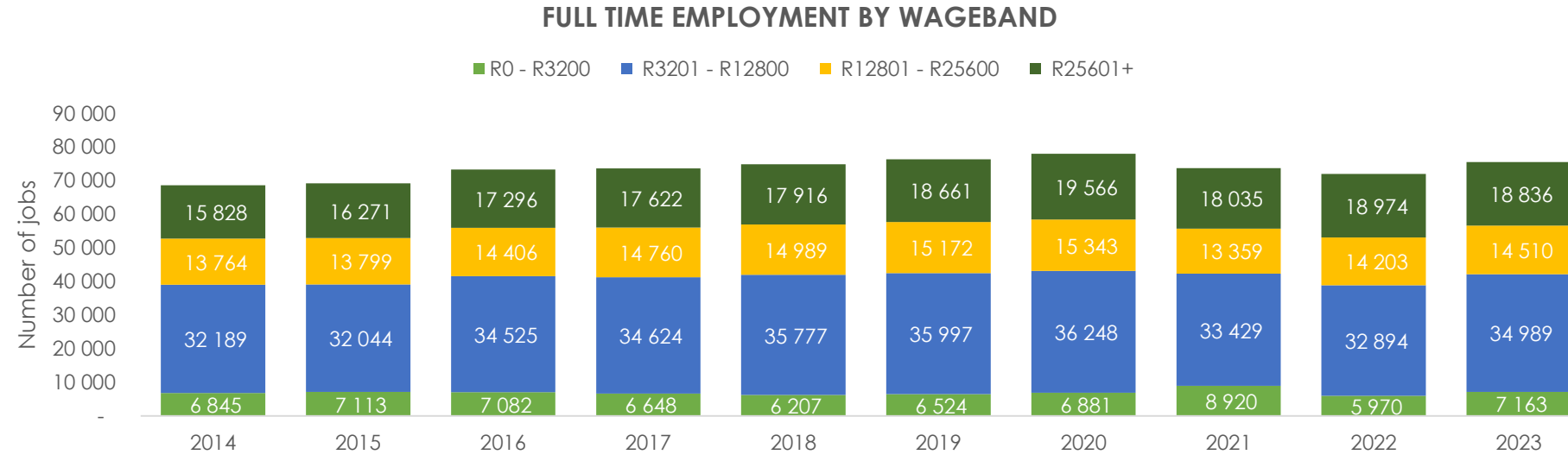
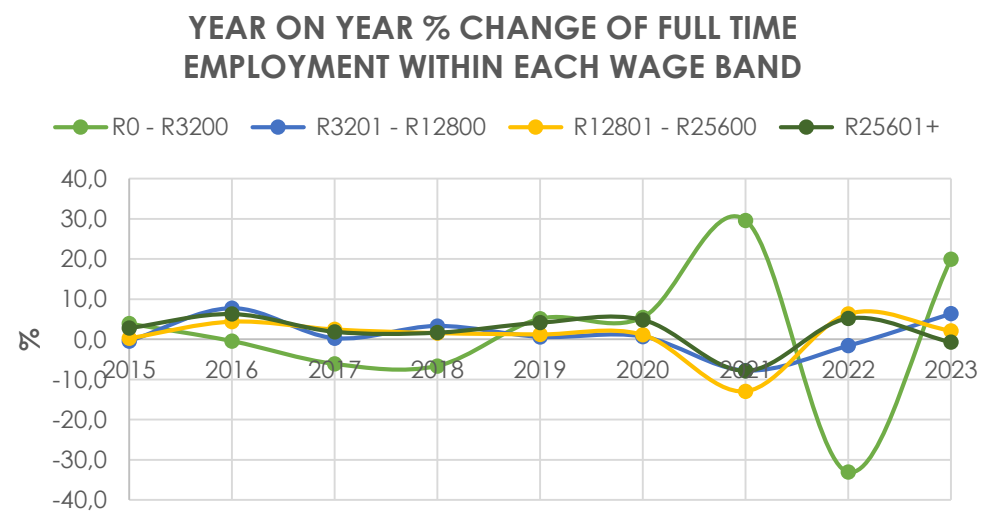
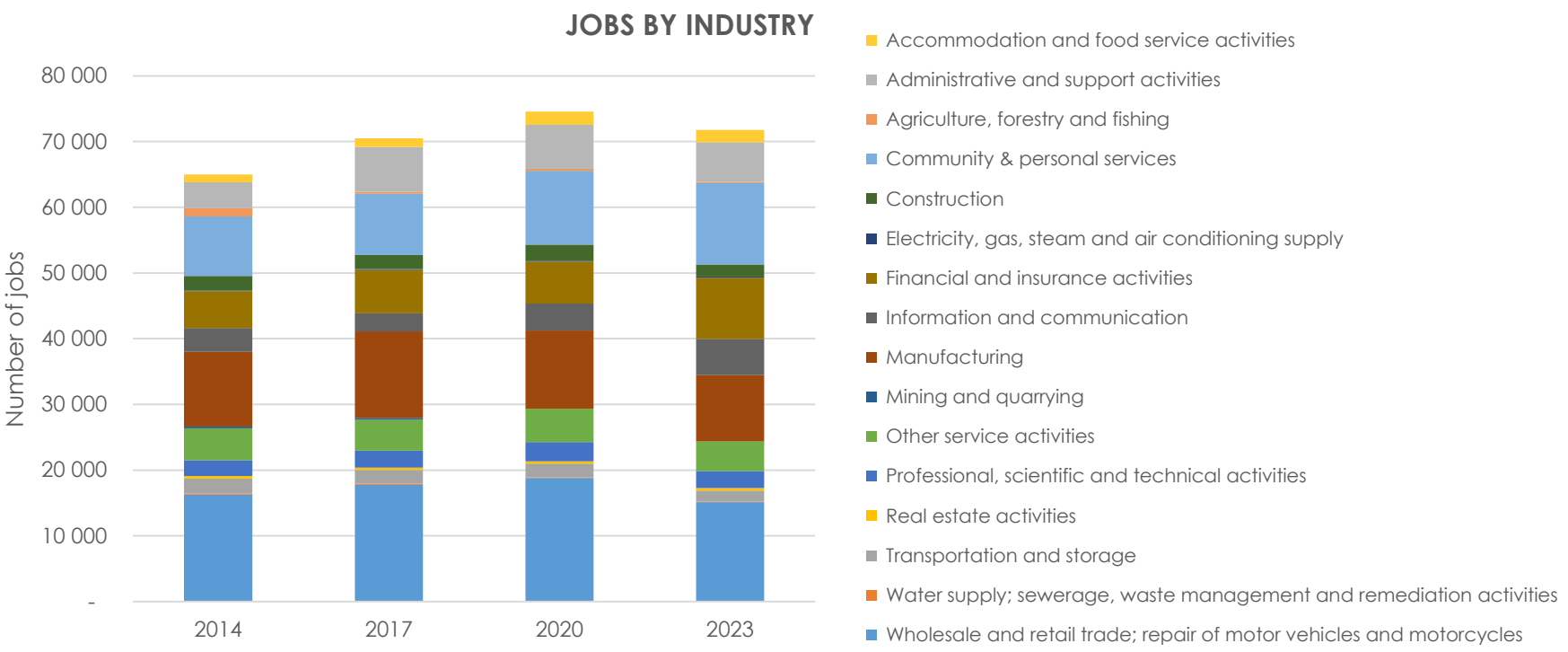
Urban land markets

Agglomeration of industries

Market performance

Performance & Potential

EMPLOYMENT OVERVIEW & FIRM TYPOLOGIES



Jobs/Firms

The number of job opportunities in the Maitland area gradually increased from 65,000 to 71,000 jobs between 2014 and 2023. Over time, most jobs have been concentrated across a mix of industries, namely, community & personal activities, manufacturing, financial & insurance activities, wholesale & retail and administrative activities.

The total number of firms in the area increased from 1,950 to 2,200 between 2014 and 2021. While small and medium to large firms are almost similar in total number, the area also includes micro firms.

Income bands

The income bands provide insights into the skill levels of employees in the area. The data indicates that a larger proportion of employees earn up to R12,800, with a significant number of employees earning in the upper income brackets as well.



Source: SARS data extract for period between 2014 and 2023. Firm size data only available between 2014 and 2021.

Policy & regulatory context

Conceptual framework

Introduction

Land use activities, employment overview & firm typologies

Development pipeline

Urban land markets

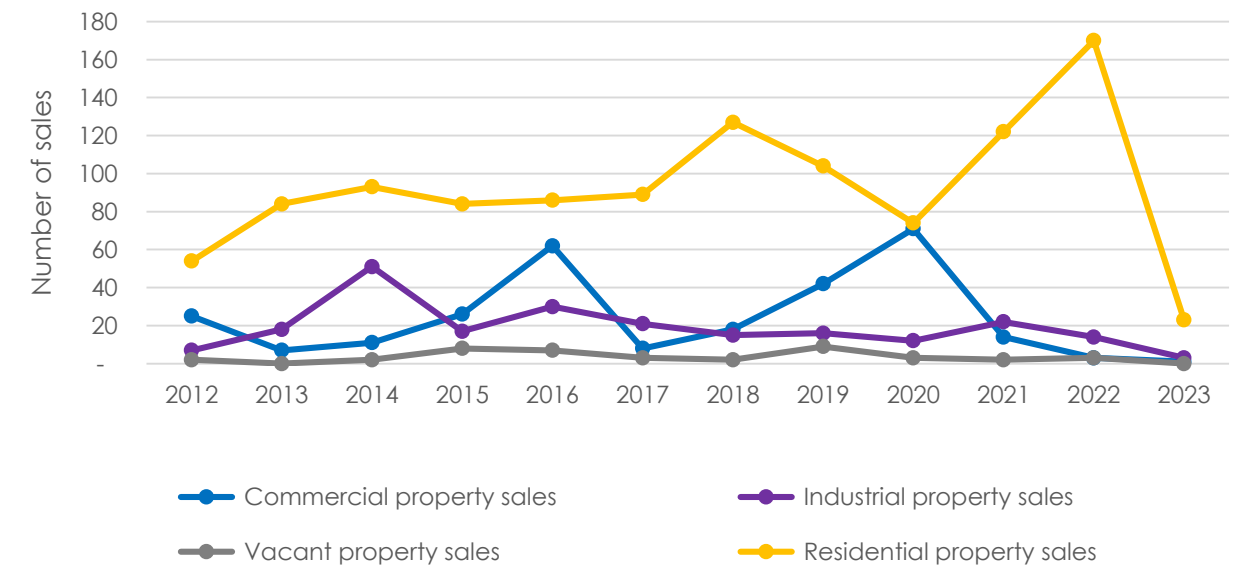
Agglomeration of industries

Market performance

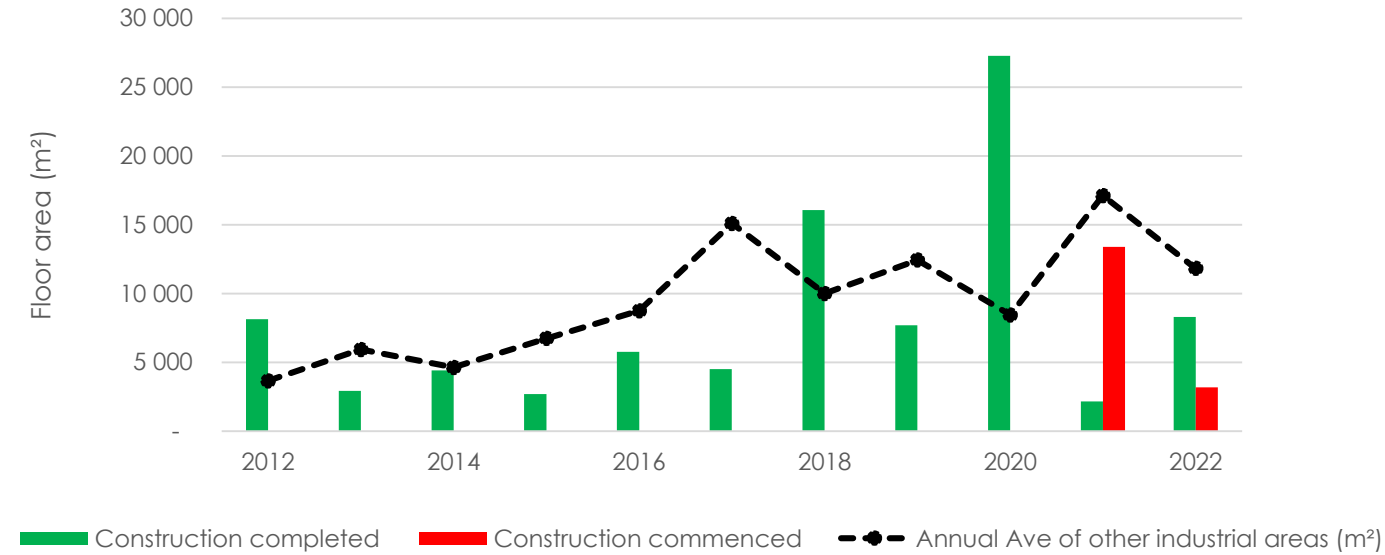
Performance & Potential

DEVELOPMENT PIPELINE

PROPERTY SALES BY SECTOR



BUILDING WORK COMPLETED/UNDER CONSTRUCTION RELATIVE TO AVERAGE OF AREAS WITH SIMILAR CHARACTER



Property sales

Property sales for the residential sector were the highest compared to other sectors and experienced a spike in sales in 2018 and 2022. Both commercial and industrial property sales mostly fluctuated, with commercial being the higher of the two. Minimal property sales were recorded for vacant land.

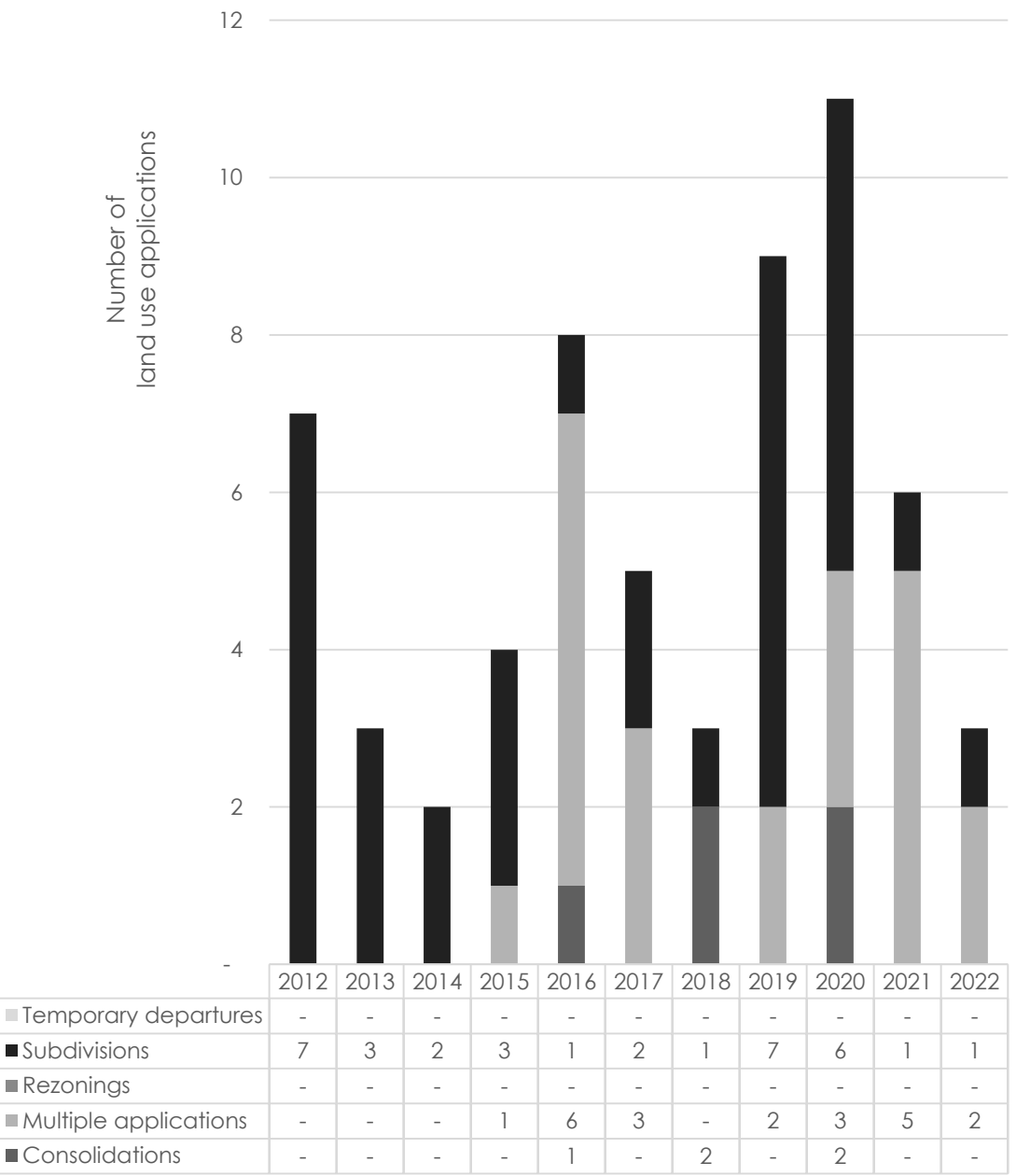
Land use applications

While the area is characterised by a variety of land uses and zoning, most of the approvals granted over the past decade were for subdivisions and multiple applications. Multiple applications may include a combination of the types seen in the graph.

Building plans

Following on from property sales and land use approvals, building work activity commenced in 2012 and progressed consistently over the 10 years. A spike in building work activity was observed in 2012, 2018 and 2020, where it exceeded the metro's annual average when compared across all other industrial areas.

APPROVED LAND USE APPLICATIONS



Source: City's DAMS (building plans and land use applications extract), General Valuation Roll.

Policy & regulatory context

Conceptual framework

Introduction

Land use activities, employment overview & firm typologies

Development pipeline

Urban land markets

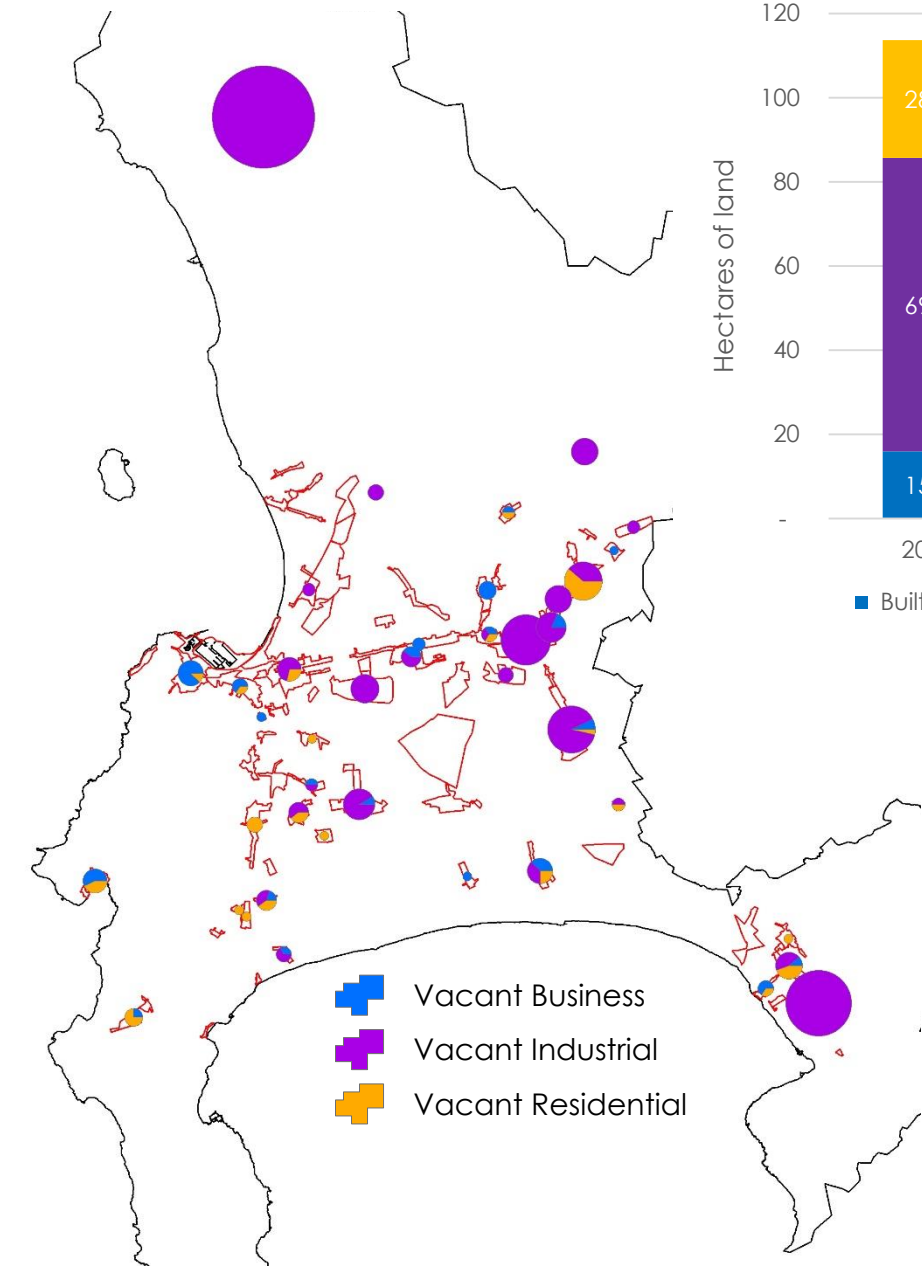
Agglomeration of industries

Market performance

Performance & Potential

LAND USE CHANGE & VACANCY RATES

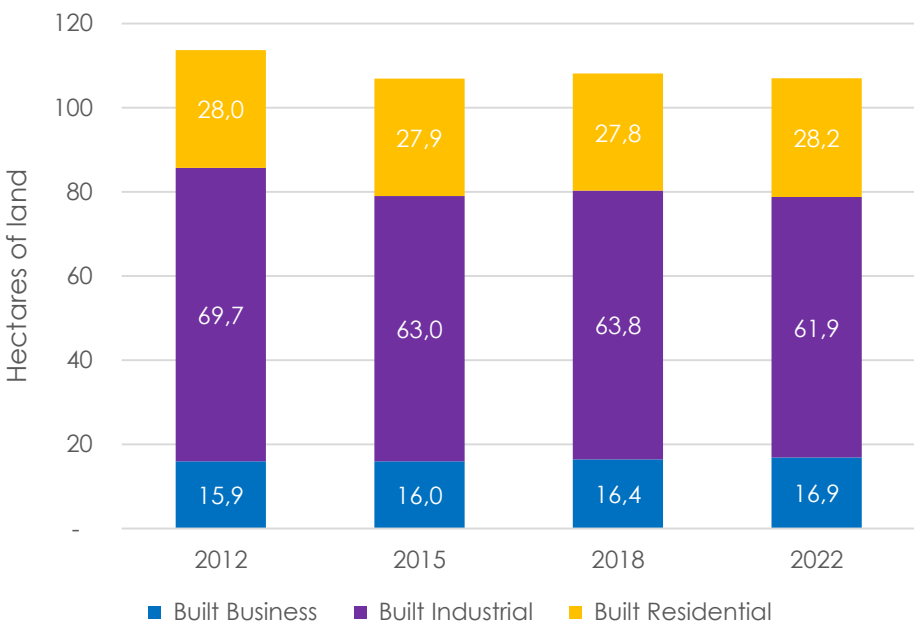
VACANT LAND ACROSS CAPE TOWN (GV 2022)*



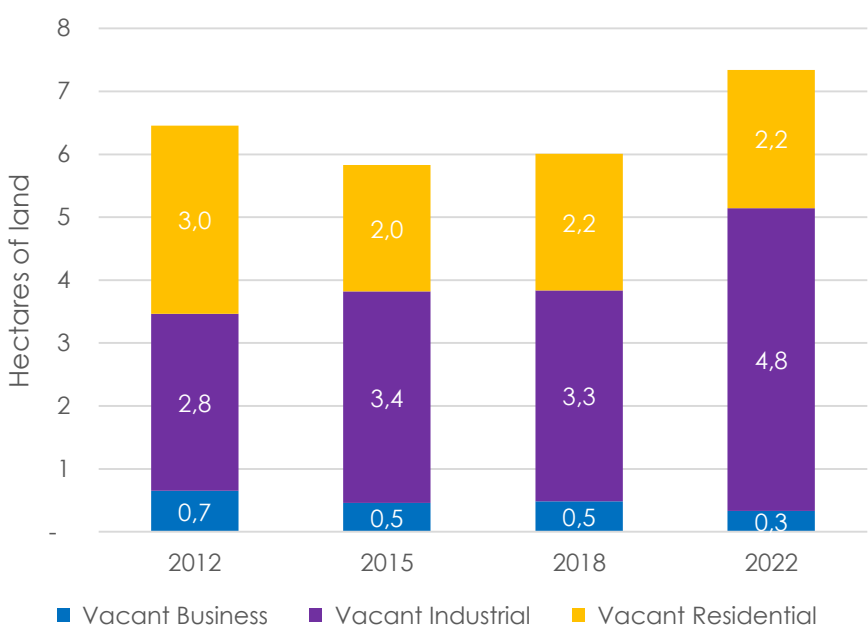
Number of land parcels that are vacant by size			
Erf Size	Commercial	Industrial	Residential
1) 1-250m ²	1	4	7
2) 251-500m ²	6	2	3
3) 501-1000m ²	1	6	2
4) 1001-2500m ²		5	5
5) 2501-5000m ²		1	2
6) 5001-10000m ²		4	1
7) >10000m ²			

Source: City's General Valuation Roll and Market Reports

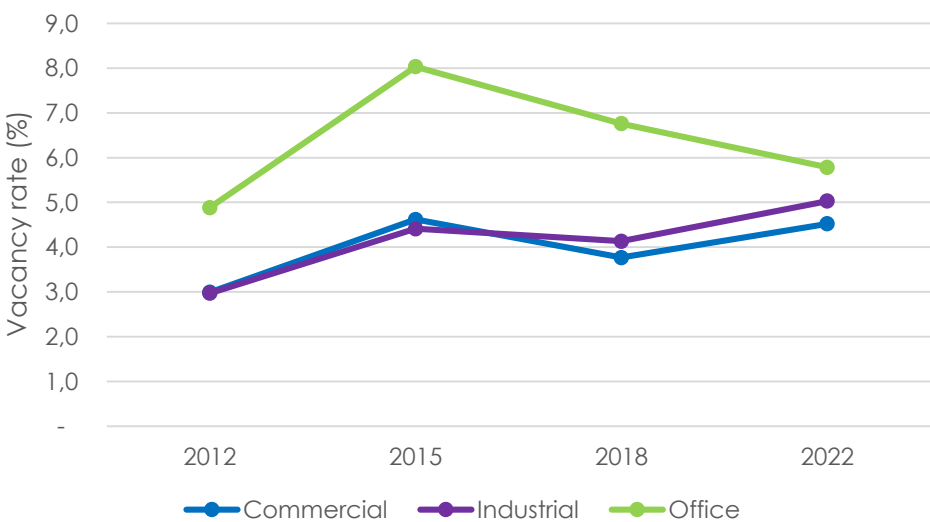
BUILT-UP LAND EXTENT BY SECTOR (TOTAL ERF EXTENT)



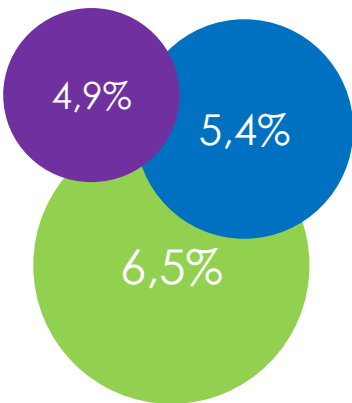
VACANT LAND EXTENT BY SECTOR (TOTAL ERF EXTENT)



AVERAGE VACANCY RATE OF EXISTING BUILDINGS



METRO AVERAGE: VACANCY RATES PER SECTOR FOR 2022*



Vacant land

The map illustrates the latest General Valuation Roll (2022) by showcasing vacant land across the metropolitan area. It complements the 2022 bar graph depicting available vacant land. While the area has mostly been stable in terms of the built-up land, a considerable amount of vacant land is available, as of 2022. Additionally, the remaining vacant land is categorised based on the number and size of the land parcels, as reflected in the accompanying table.

Vacancy rates

In addition to vacant land, vacancy rates for the industrial and commercial sectors increased from 3% in 2012 to 5% and 4,5% in 2022, respectively. The office sector increased from 4,9% in 2012 to 5,8% in 2022.

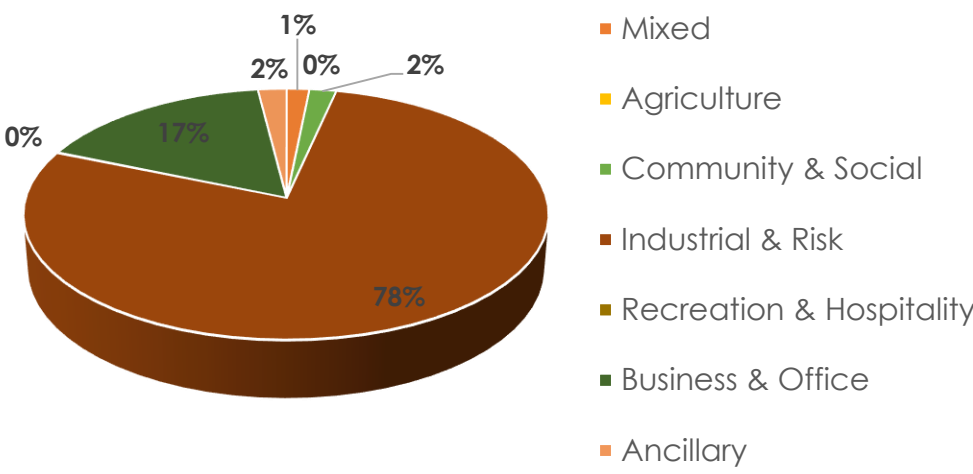
*A metro view that provides further context relative to this economic area.

Policy & regulatory context
Conceptual framework
Introduction
Land use activities, employment overview & firm typologies
Development pipeline
Urban land markets
Agglomeration of industries
Market performance
Performance & Potential

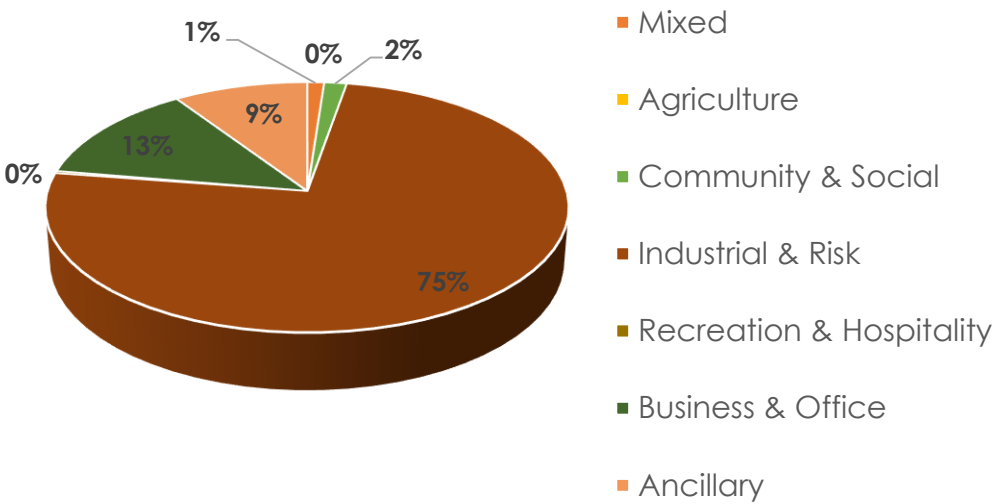
AGGLOMERATION OF INDUSTRIES

SECTORAL AGGLOMERATION AND CO-AGGLOMERATION RELATIONSHIPS

% OF LAND USE GROUPS (2012)



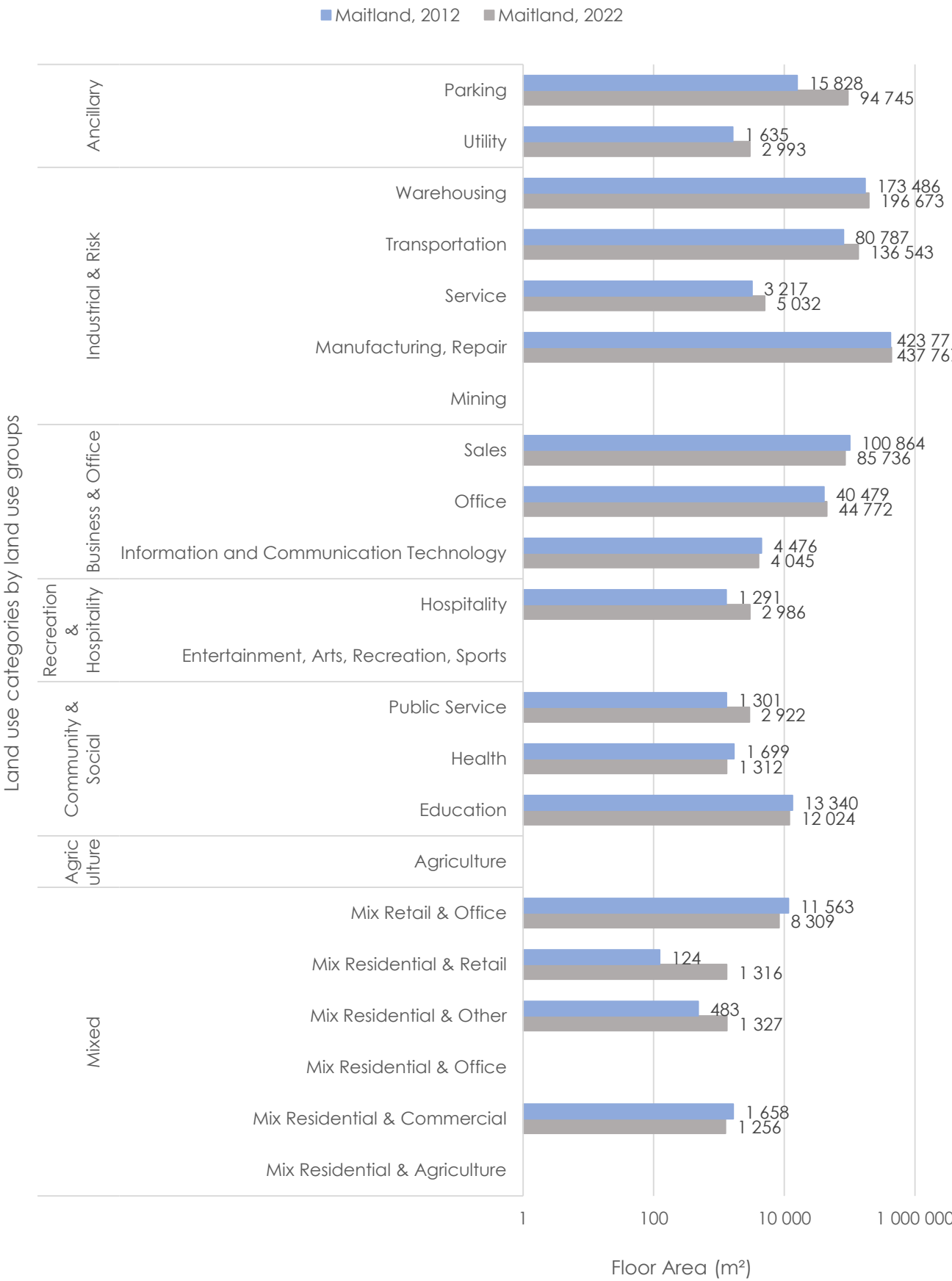
% OF LAND USE GROUPS (2022)



The pie charts represent the % split of land use groups agglomerated in Maitland. This % is based on the cumulative floor area (m²) across the various land uses and as can be seen by the chart, the Industrial & Risks group has been dominant in both 2012 and 2022 compared to the other groups, which are mainly in support of the dominant land use group.

Furthermore, the bar graph represents a comparative view between 2012 and 2022 on the co-agglomeration of land use categories within each of the land use groups. The area shows the most dominance between 2012 and 2022 for manufacturing, repairs, warehousing, transportation and sales. There is also a significant presence of other land uses, considering the diversity/character based on the locality of this economic area.

FLOOR AREA PER LAND USE CATEGORY FOR 2012 AND 2022



Source: Analysis of GV data (May 2024)

Policy & regulatory context

Conceptual framework

Introduction

Land use activities, employment overview & firm typologies

Development pipeline

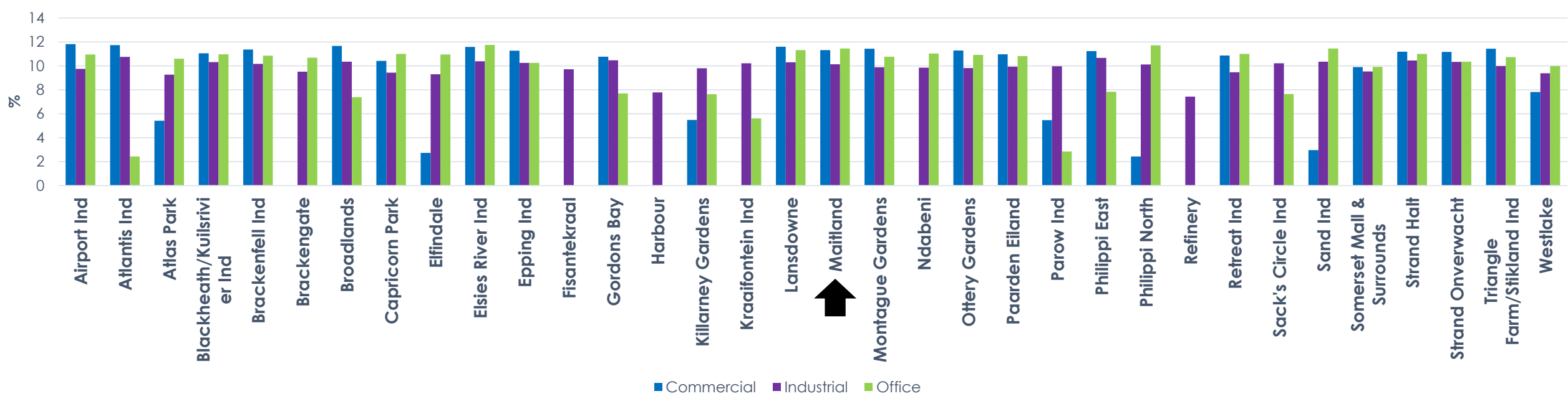
Urban land markets

Agglomeration of industries

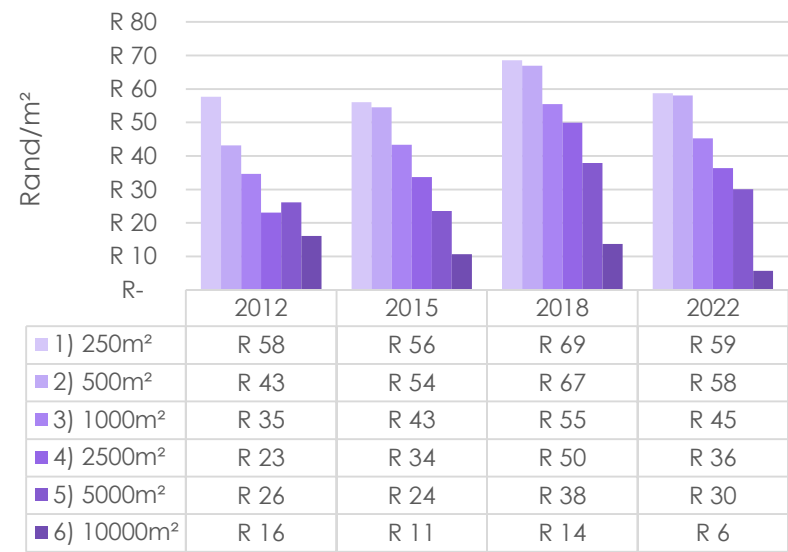
Market performance

Performance & Potential

AVERAGE CAPITALISATION RATE OF MAITLAND IN RELATION TO OTHER INDUSTRIAL AREAS FOR THE PERIOD BETWEEN 2012 AND 2022



INDUSTRIAL RENTALS

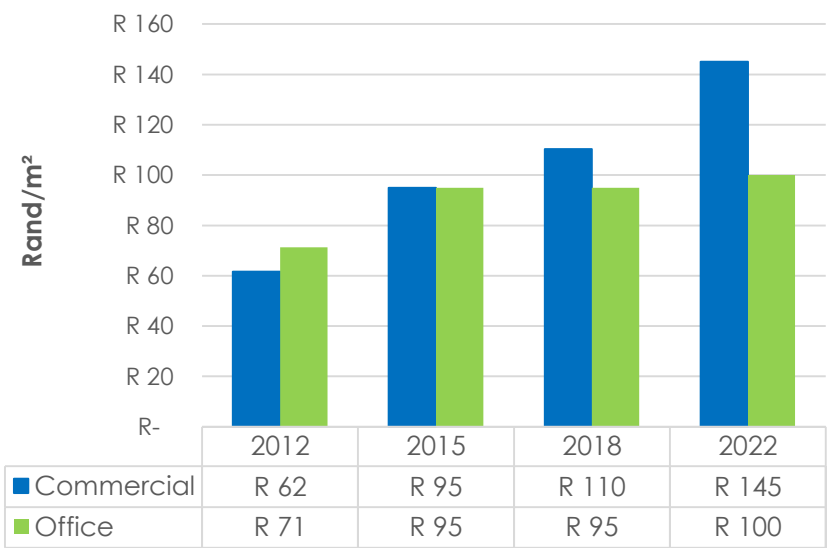


Rental rates

Rental rates across all industrial property sizes increased between 2012 and 2018, with a decrease experienced in 2022. Higher rentals are recorded for smaller industrial spaces.

Commercial rentals gradually increased between 2012 and 2022, which was higher than office rentals. Office rentals also gradually increased between 2012 and 2018 and remained constant as of 2022.

COMMERCIAL AND OFFICE RENTALS



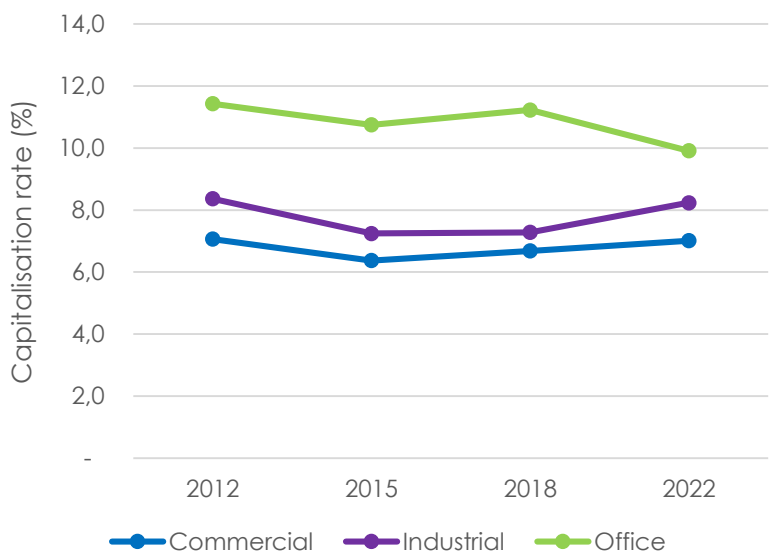
Comparative view on capitalisation rates

The average capitalisation rate between 2012 and 2022 for the commercial, industrial and office sectors were 11,31%, 10,13% and 11,41%, respectively and further indicating its competitiveness relative to other industrial areas.

Year on year capitalisation rates for the industrial sector decreased from 8,4% in 2012 to 8,2% in 2022. The office sector decreased from 11,4% to 9,4%, while the commercial sector remained consistent around the 7% mark.

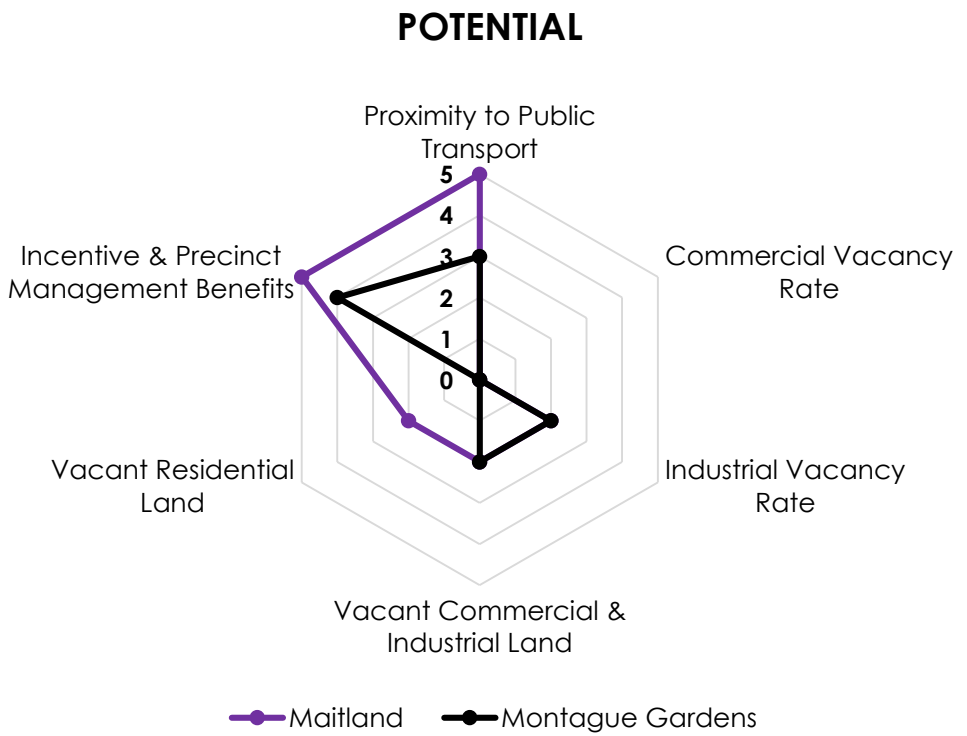
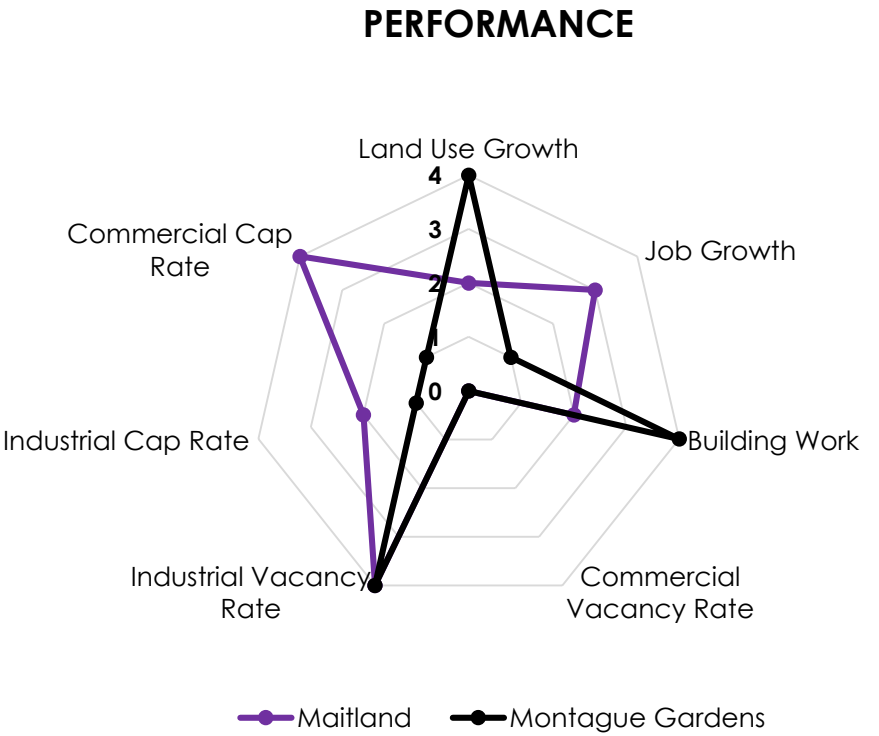
- Higher cap rates = higher investment risk.
- Lower cap rates = lower investment risk.

CAPITALISATION RATES



PERFORMANCE & POTENTIAL

The scores provided below summarise the detailed information presented throughout this profile. The method used to calculate Performance and Potential is based on several measurable individual indicators. The **scoring system ranges from 0 to 5, where 0 indicates low performance or potential and 5 indicates high performance or potential**. This profile compares either to Cape Town CBD (Commercial) or Montague Gardens (Industrial), depending on the classification of the economic area, as these two areas have attracted the most new floor area between 2012 and 2022 within their respective classifications.



Indicator		Description
Performance	Land Use Growth	Measures the growth of new floor area (m²) from 2012 to 2022 within an economic area, compared to other economic areas of similar classification. More growth indicates better performance. Source: General Valuation Roll.
	Job Growth	Measures the percentage change in jobs within an economic area from 2014 to 2023, comparing this data against other economic areas of similar classification. A higher job prevalence indicates better performance. Source: SARS as of May 2024.
	Building Work	Measures building work activity (new and improved m²) within an economic area from 2012 to 2022, compared to other economic areas of similar classification. Increased building work activity indicates better performance. Source: City's DAMS.
	Vacancy Rate	Measures the average vacancy rates for the commercial and industrial sectors as of 2022, compared to other economic areas of similar classification. Lower vacancy rates indicate better performance. Source: City's Market Reports.
	Capitalisation Rate	Measures the percentage change in capitalisation rates for the commercial and industrial sectors during the years 2012, 2015, 2018, and 2022, comparing them to other economic areas of similar classification. A lower average percentage change between these periods indicates greater maturity and consequently, higher performance. Source: City's Market Reports.
Potential	Proximity to Public Transport	Assess the accessibility of various public transport modes near an economic area. Greater access to multiple transport modes indicates higher potential. Source: City's UPD, spatial analysis.
	Vacant Land	Assess the availability of vacant land in the commercial, industrial and residential sectors. A higher amount of vacant land across these three sectors as of 2022 indicates greater potential. Source: General Valuation Roll.
	Vacancy Rate	Measures the average vacancy rates for the commercial and industrial sectors as of 2022, compared to other economic areas of similar classification. Higher vacancy rates indicate greater potential. Source: City's Market Reports.
	Incentive & Precinct Management Benefits	Evaluate the spatial overlap, whether partial or complete, of incentive areas and established precinct management tools within each economic area. A greater degree of overlap suggests increased potential. Source: City's UPD, spatial analysis.

Policy & regulatory context

Conceptual framework

Introduction

Land use activities, employment overview & firm typologies

Development pipeline

Urban land markets

Agglomeration of industries

Market performance

Performance & Potential