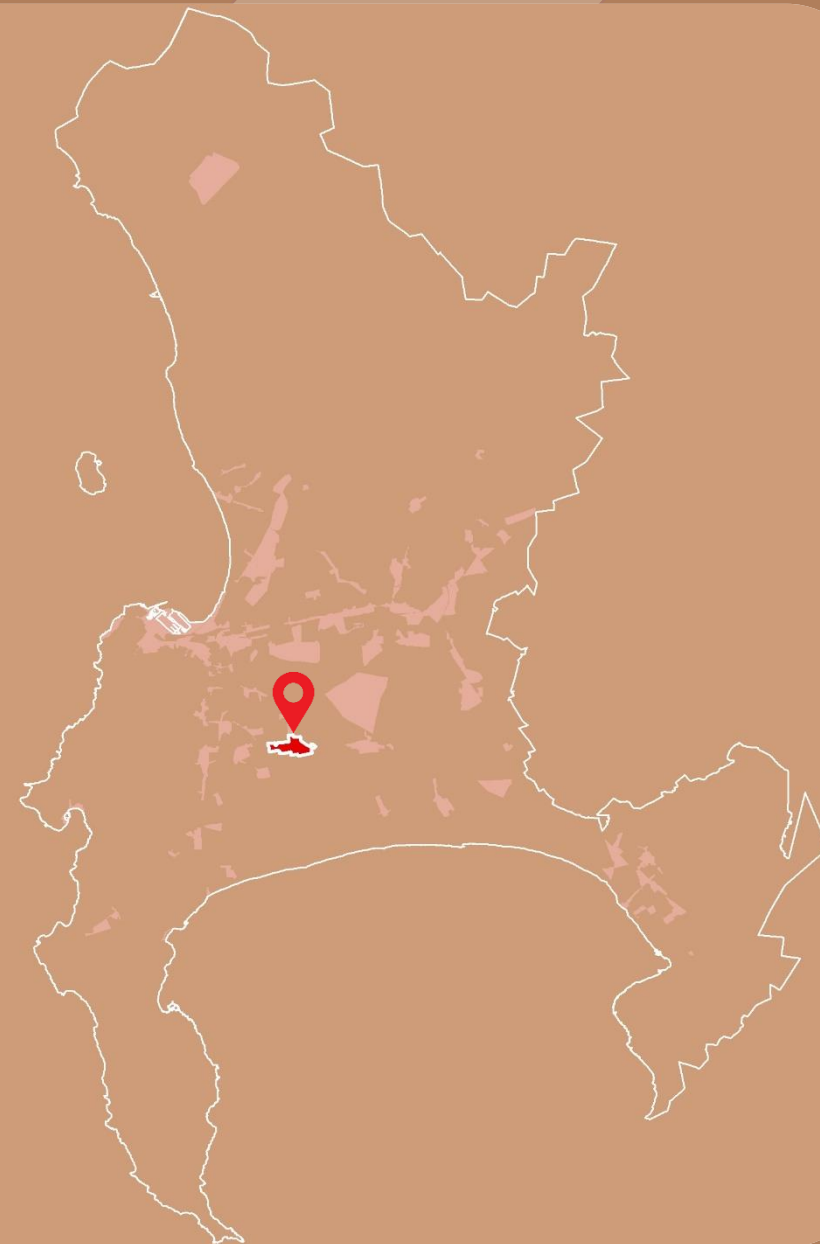# PHILIPPI NORTH INDUSTRIAL ECONOMIC AREA PROFILE

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

CITY OF CAPE TOWN
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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

- **Cape Flats DSDF - Subdistrict 1: Greater Athlone area:
    o District Development Guidelines (page 64)
    o Subdistrict Development Guidelines (page 93)
    o Consolidated subdistrict SDF (Figure 16: Cape Flats subdistrict 1: Greater Athlone area)

***Reference is made to Lansdowne as the industrial area that overlaps with the spatial boundary of this profile (Philippi North). When engaging the Cape Flats DSDF, use the 'consolidated subdistrict SDF to spatially orientate yourself)*

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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.
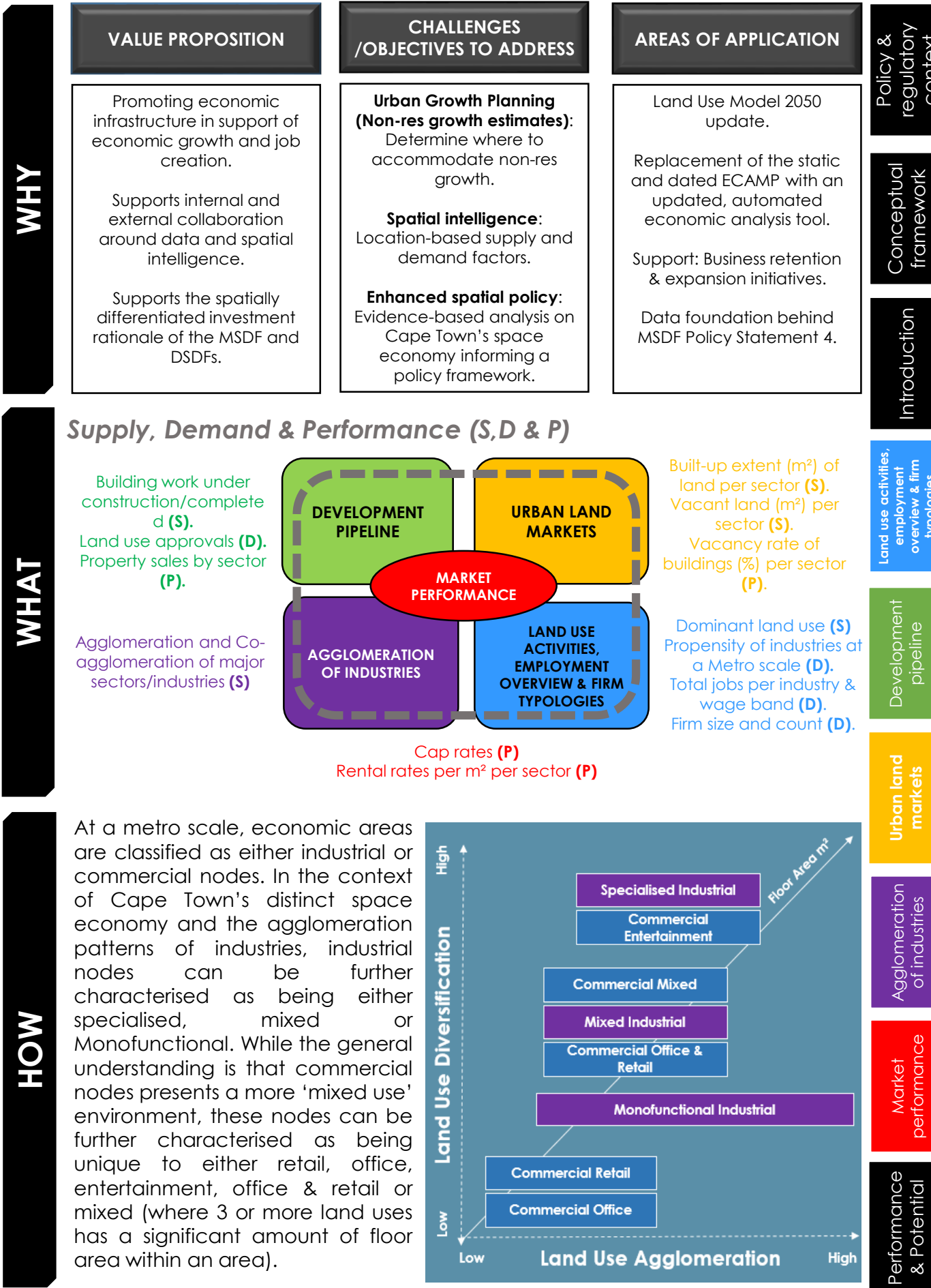

MICRO-ECONOMIC DEMAND & SUPPLY FACTORS
This profile examines a range of micro-economic indicators to highlight trends in supply and demand specific to the economic area. The indicators include:
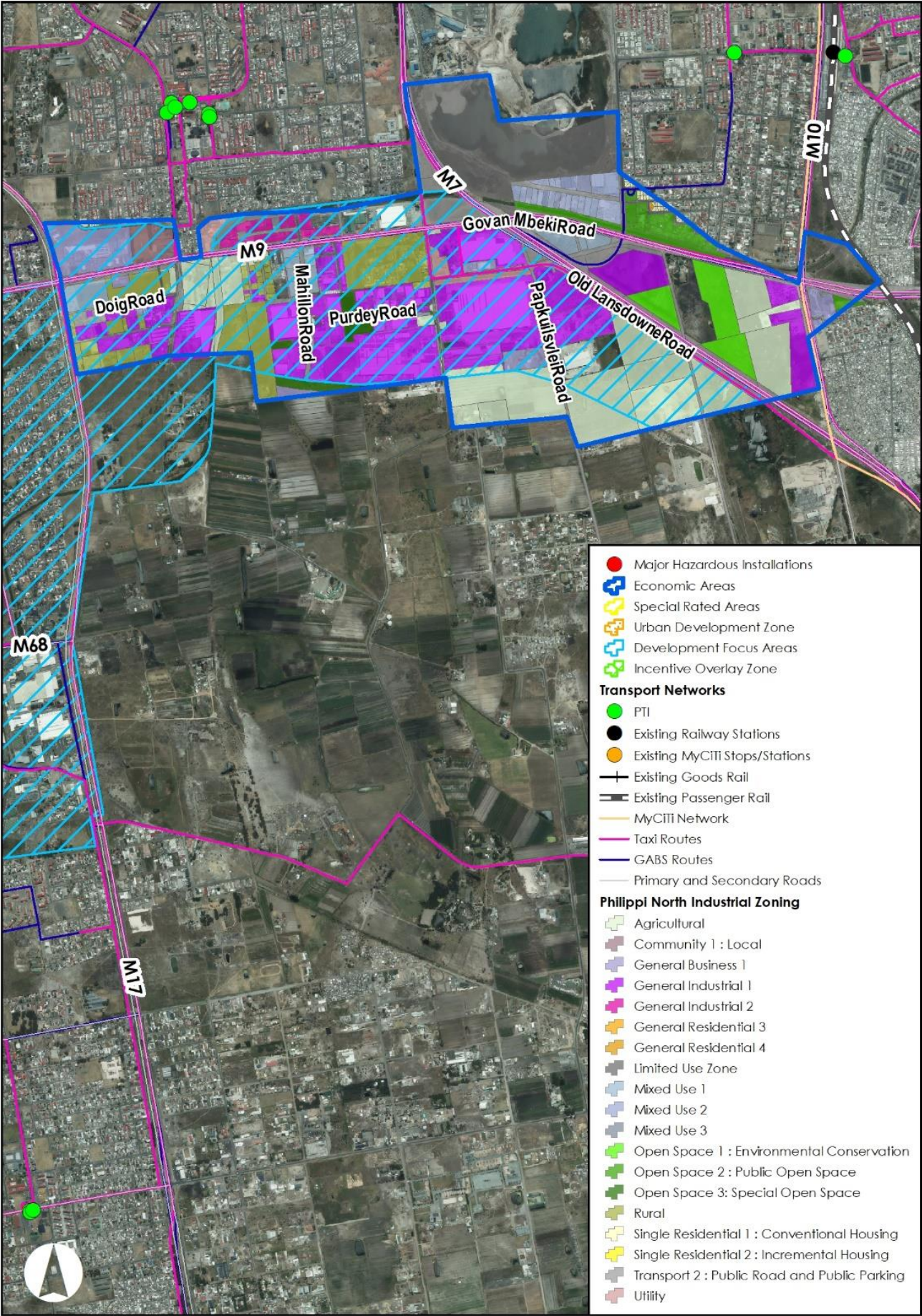
- Property sales per land use sector
- Building work completed
- Types of land use applications approved
- Vacant land per land use sector
- Built-up land and take up rate per land use sector
- Dominant land uses present in an area
- Building vacancy rate overtime
- Capitalisation rate over time
- Rental 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)

WHY

VALUE PROPOSITION

Promoting economic infrastructure in support of economic growth and job creation.

Supports internal and external collaboration around data and spatial intelligence.

Supports the spatially differentiated investment rationale of the MSDF and DSDFs.

CHALLENGES /OBJECTIVES TO ADDRESS

Urban Growth Planning (Non-res growth estimates): Determine where to accommodate non-res growth.

Spatial intelligence: Location-based supply and demand factors.

Enhanced spatial policy: Evidence-based analysis on Cape Town's space economy informing a policy framework.

AREAS OF APPLICATION

Land Use Model 2050 update.

Replacement of the static and dated ECAMP with an updated, automated economic analysis tool.

Support: Business retention & expansion initiatives.

Data foundation behind MSDF Policy Statement 4.

WHAT

Supply, Demand & Performance (S,D & P)

Building work under construction/completed **(S)**.
Land use approvals **(D)**.
Property sales by sector **(P)**.

Agglomeration and Co-agglomeration of major sectors/industries **(S)**

Built-up extent (m²) of land per sector **(S)**.
Vacant land (m²) per sector **(S)**.
Vacancy rate of buildings (%) per sector **(P)**.

Dominant land use **(S)**
Propensity of industries at a Metro scale **(D)**.
Total jobs per industry & wage band **(D)**.
Firm size and count **(D)**.

DEVELOPMENT PIPELINE — **URBAN LAND MARKETS** — **MARKET PERFORMANCE** — **AGGLOMERATION OF INDUSTRIES** — **LAND USE ACTIVITIES, EMPLOYMENT OVERVIEW & FIRM TYPOLOGIES**

Cap rates **(P)**
Rental rates per m² per sector **(P)**

HOW

At a metro scale, economic areas are classified as either industrial or commercial nodes. In the context of Cape Town's distinct space economy and the agglomeration patterns of industries, industrial nodes can be further characterised as being either specialised, mixed or Monofunctional. While the general understanding is that commercial nodes presents a more 'mixed use' environment, these nodes can be further characterised as being unique to either retail, office, entertainment, office & retail or mixed (where 3 or more land uses has a significant amount of floor area within an area).

Land Use Diversification (High / Low) — Land Use Agglomeration (Low / High) — Floor Area m²

- Specialised Industrial
- Commercial Entertainment
- Commercial Mixed
- Mixed Industrial
- Commercial Office & Retail
- Monofunctional Industrial
- Commercial Retail
- Commercial Office

PHILIPPI NORTH INDUSTRIAL

Location
- The area is approximately 25km southeast of Cape Town's Central Business District and the Port of Cape Town. Furthermore, it is located 5km from Cape Town International Airport.
- It is also situated near the M7, used to link to the N2 and the N1 highways, providing easy access to areas across Cape Town.
- The area is mainly serviced by GABS and taxis.
- Access to a skilled workforce from surrounding areas, includes the broader Philippi, Hanover Park, Cross Roads and Nyanga areas.

Zoning, land use and form
- The area is predominantly zoned for industrial and agricultural purposes.
- The area is mainly characterised by light industrial uses, which include manufacturing, repairs, warehousing, sales, transportation, public service, agriculture/agri-processing and office accommodation.
- The average land parcel sizes in the area mostly range between 1,000 – 20,000m², with a limited number of land parcels ranging beyond 20,000m².

Spatial planning mechanisms
- The area has been identified as a Development Focus Area in terms of the Cape Flats District Spatial Development Framework.
- The area has been identified as an industrial incentive area in terms of the City's Industrial Incentive Policy.

Key highlights of the area include:

- Industrial developments started to be constructed along the northern area of the Philippi Horticultural Area in the early 2000s.
- The Spar distribution centre is located in the area.
- The area has been identified as part of the City of Cape Town's incentive policy to be targeted for investment.
- PnP also located their distribution centre adjacent to Spar DC as the area developed over time into an industrial hub.

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LAND USE ACTIVITIES

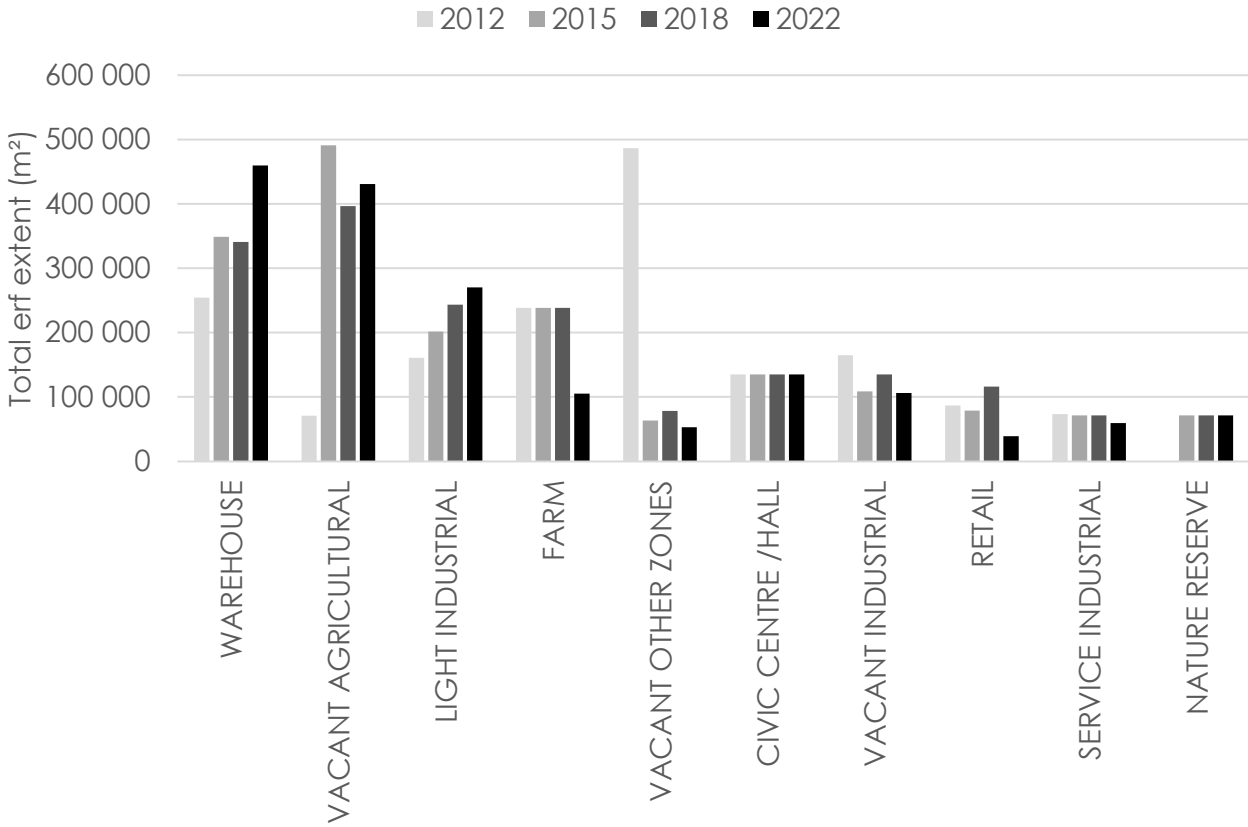A recent analysis involved converting land use codes from the General Valuation Roll (GV Roll) into Standard Industrial Classification (SIC) codes. This was done to determine the prevalence of industries operating in areas with similar characteristics.

- Between 2012 and 2022, Philippi North industrial was mainly characterised by a greater propensity for transport & storage and manufacturing, 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 Philippi North industrial as a significant contributor to manufacturing, transport & storage, with the transport & storage performing higher than the sectoral average 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 warehousing, light industrial and farm land.
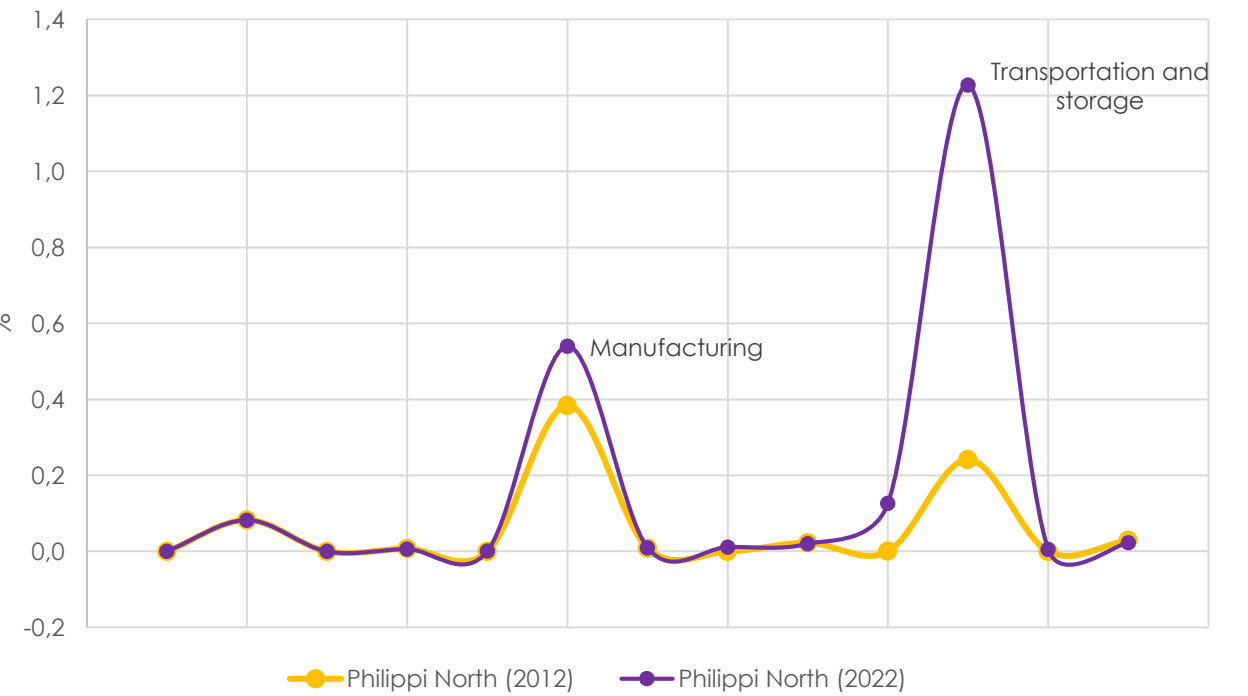
TOP 10 MOST DOMINANT LAND USES BETWEEN 2012 AND 2022

Legend: ■ 2012 ■ 2015 ■ 2018 ■ 2022

METROSCALE BENCHMARK

- Wholesale and retail trade; repair of motor vehicles and motorcycles
- Water supply; sewerage, waste management and remediation activities
- Transportation and storage
- Real estate activities
- Public administration and defence; compulsory social security
- Professional, scientific and technical activities
- Other service activities
- Manufacturing
- Human health and social work activities
- Financial and insurance activities
- Arts, entertainment and recreation
- Activities of households as employers; undifferentiated goods- and services producing activities of households for own use

NODAL TYPOLOGY FOR 2012 AND 2022
(*Mixed Industrial*)

Legend: ●── Philippi North (2012) ●── Philippi North (2022)

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

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JOBS BY INDUSTRY

Legend:
- Accommodation and food service activities
- Administrative and support activities
- Agriculture, forestry and fishing
- Community & personal services
- Construction
- Electricity, gas, steam and air conditioning supply
- Financial and insurance activities
- Information and communication
- Manufacturing
- Mining and quarrying
- Other service activities
- Professional, scientific and technical activities
- Real estate activities
- Transportation and storage
- Wholesale and retail trade; repair of motor vehicles and motorcycles

Number of jobs (2014, 2017, 2020, 2023)

YEAR ON YEAR % CHANGE OF FULL TIME EMPLOYMENT WITHIN EACH WAGE BAND

Legend: R0 - 3200, R3201 - R12800, R12801 - R25600, R25601+
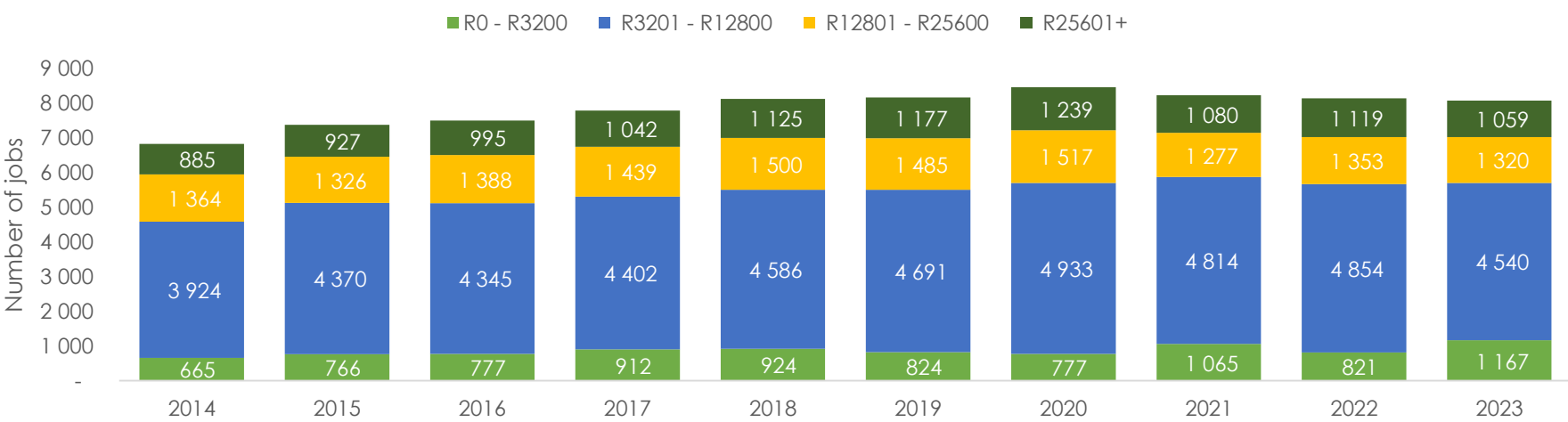
NUMBER OF FIRM TYPOLOGIES

	2014	2015	2016	2017	2018	2019	2020	2021
Small	159	172	180	185	183	195	197	173
Micro	34	36	37	39	40	45	48	56
Medium-to-Large	107	137	143	128	141	149	152	131

Legend: Medium-to-Large, Micro, Small

FULL TIME EMPLOYMENT BY WAGEBAND

Legend: R0 - 3200, R3201 - R12800, R12801 - R25600, R25601+

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
R25601+	885	927	995	1 042	1 125	1 177	1 239	1 080	1 119	1 059
R12801 - R25600	1 364	1 326	1 388	1 439	1 500	1 485	1 517	1 277	1 353	1 320
R3201 - R12800	3 924	4 370	4 345	4 402	4 586	4 691	4 933	4 814	4 854	4 540
R0 - 3200	665	766	777	912	924	824	777	1 065	821	1 167

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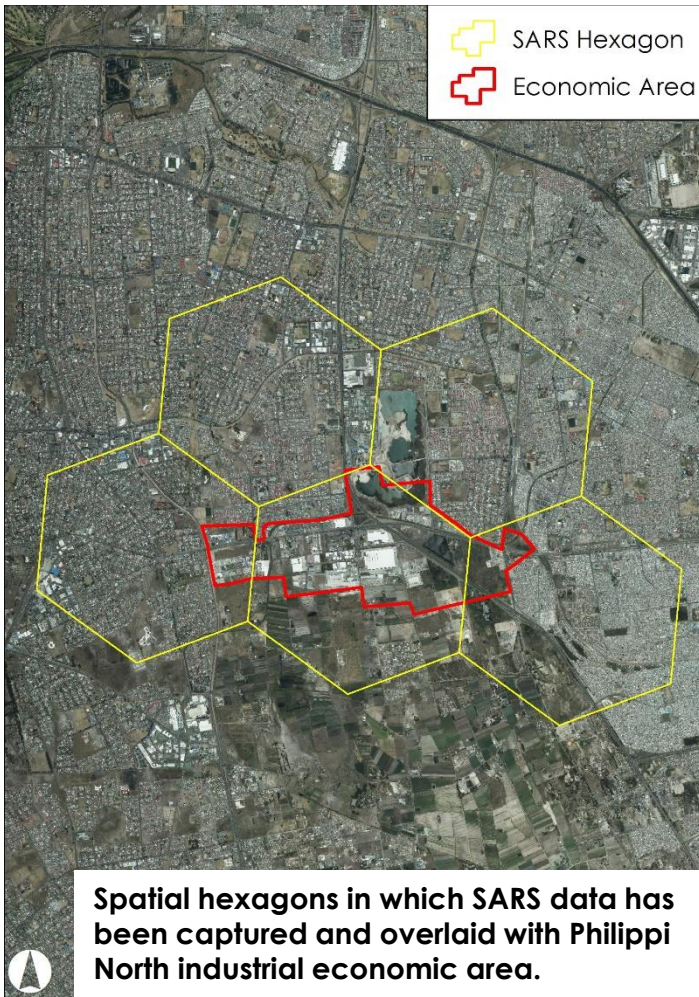
Jobs/Firms

The number of job opportunities surrounding Philippi North industrial area increased from 70,000 to 90,000 between 2014 and 2023. An overall growth in jobs has been experienced, with the majority of jobs concentrated in the financial & insurance services, community & personal services, professional services, manufacturing and wholesale & retail.

The total number of firms increased from 300 to 350 between 2014 and 2021. While small firms have been the most dominant, there is also a significant presence of medium-to-large firms, including micro firms.

Income bands

The income bands indicate the skill levels of the employed workforce. The data suggests that a larger proportion of employees earn up to R12,800. However, there is also a considerable number of employees earning beyond R12,800.

Legend:
- SARS Hexagon
- Economic Area

Spatial hexagons in which SARS data has been captured and overlaid with Philippi North industrial economic area.

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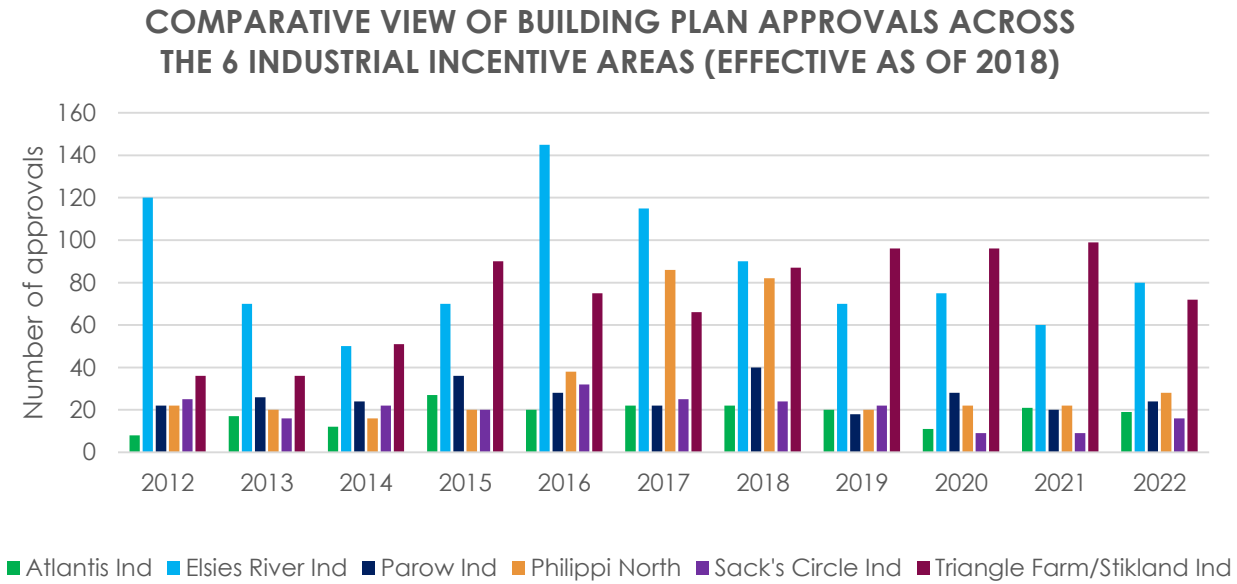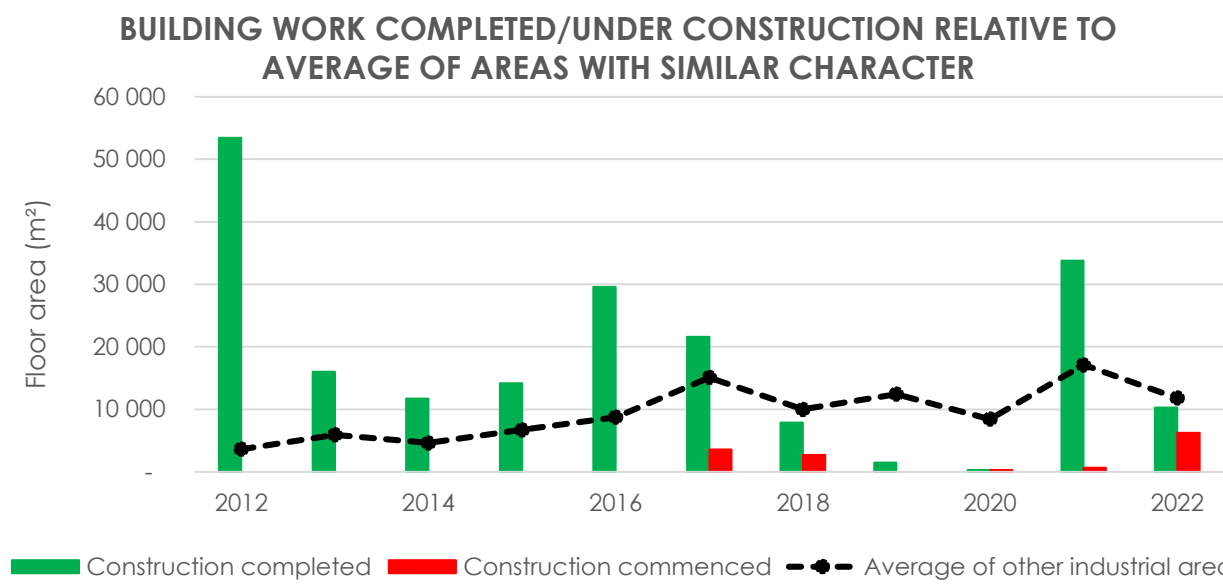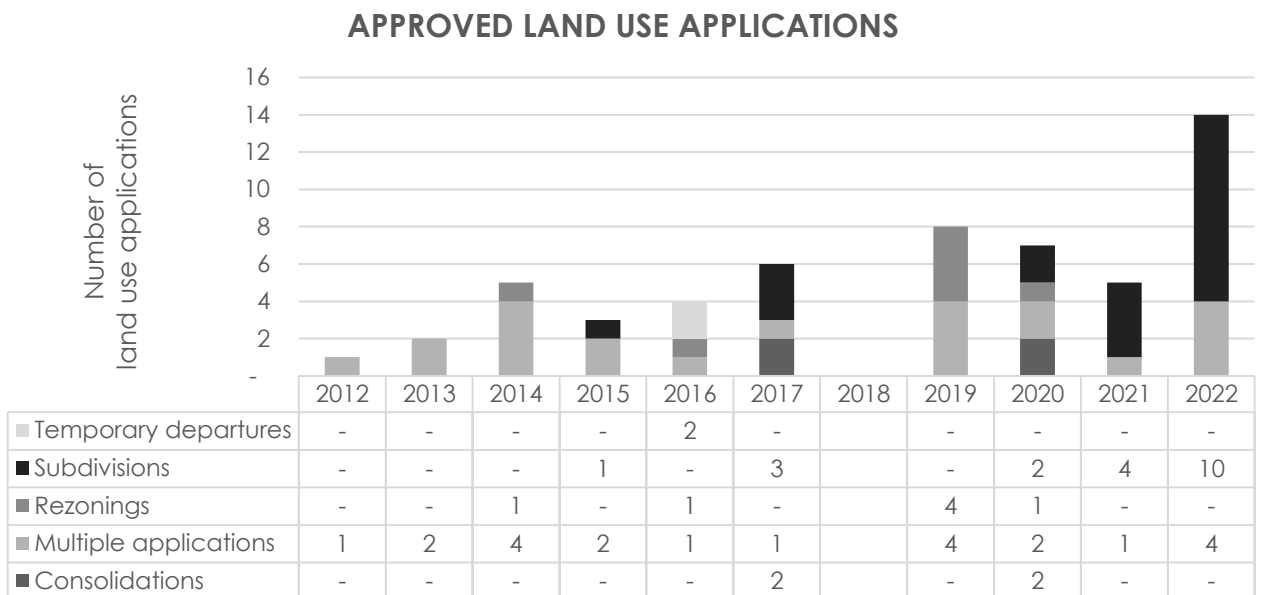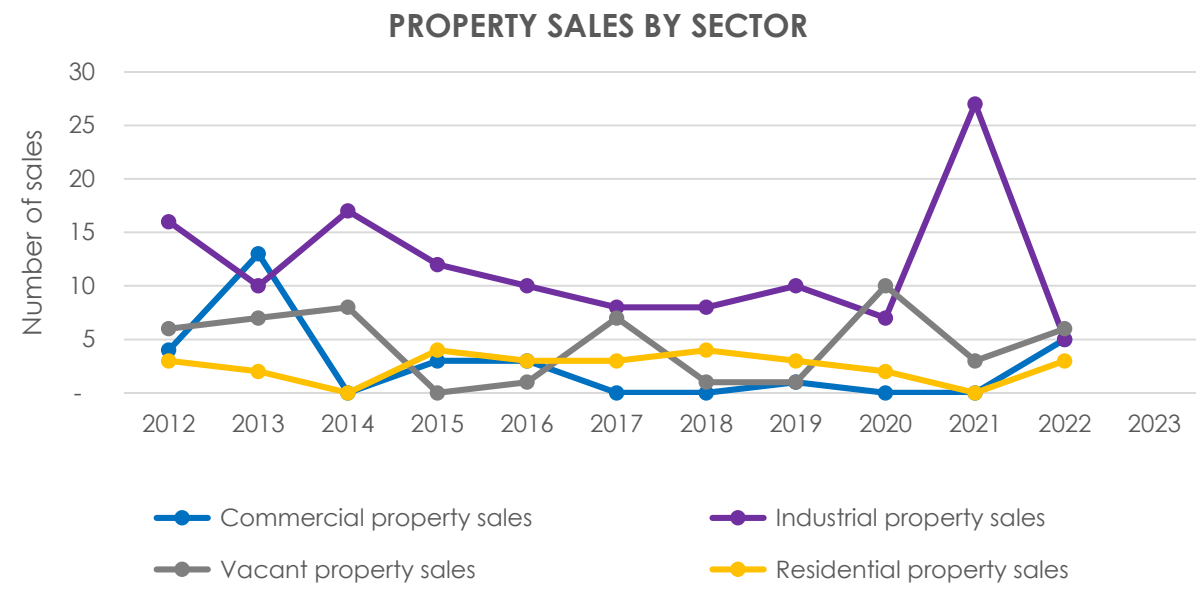- Development pipeline
- Urban land markets
- Agglomeration of industries
- Market performance
- Performance & Potential

PROPERTY SALES BY SECTOR

Legend: Commercial property sales · Industrial property sales · Vacant property sales · Residential property sales

APPROVED LAND USE APPLICATIONS

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Temporary departures	-	-	-	-	2	-		-	-	-	-
Subdivisions	-	-	-	1	-	3		-	2	4	10
Rezonings	-	-	1	-	1	-		4	1	-	-
Multiple applications	1	2	4	2	1	1		4	2	1	4
Consolidations	-	-	-	-	-	2		-	2	-	-

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

Legend: Construction completed · Construction commenced · Average of other industrial areas

COMPARATIVE VIEW OF BUILDING PLAN APPROVALS ACROSS THE 6 INDUSTRIAL INCENTIVE AREAS (EFFECTIVE AS OF 2018)

Legend: Atlantis Ind · Elsies River Ind · Parow Ind · Philippi North · Sack's Circle Ind · Triangle Farm/Stikland Ind

Property Sales
Between 2012 and 2022, property sales in the industrial sector were higher and peaked significantly in 2021 compared to the other sectors. However, residential, commercial and vacant industrial property sales all fluctuated throughout the 10 years, with vacant industrial land notably higher, indicating anticipated growth to occur.

Land Use Applications
Most approvals during this period were highest for multiple applications and subdivisions, indicating diverse land use requirements to be in place for the area. Multiple applications may include a combination of the types seen in the graph.

Building Plans
In light of property sales and land use approvals, building work activity has been consistently active over the past decade, positioning itself above the metro's annual average compared to other industrial areas. Furthermore, noting that Philippi North is also 1 of 6 industrial incentive areas, the graphs reflect its competitiveness with other incentive areas in terms of the number of building plan approvals granted.

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

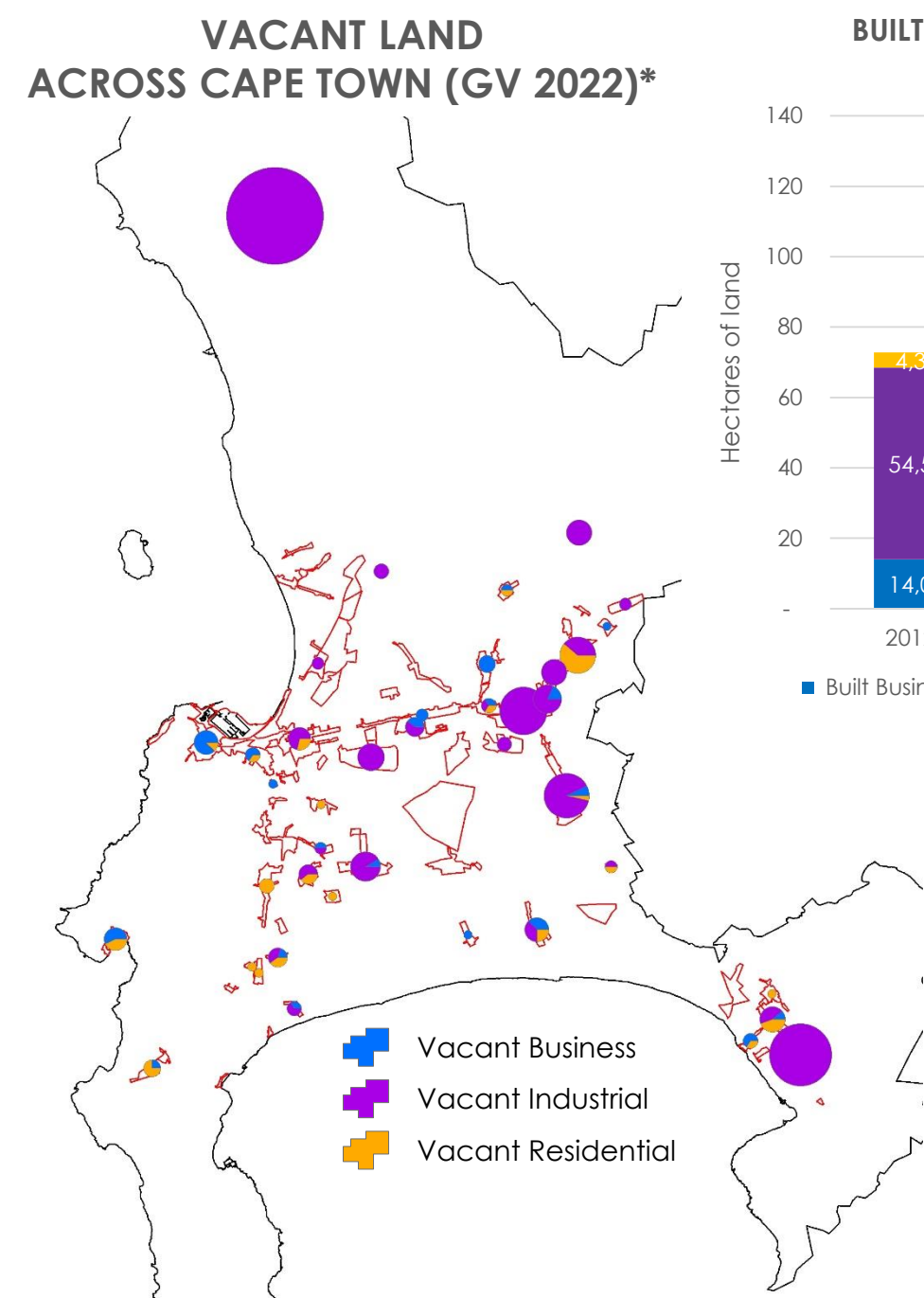Sidebar tabs: Policy & regulatory context · Conceptual framework · Introduction · Land use activities, employment overview & firm typologies · Development pipeline · Urban land markets · Agglomeration of industries · Market performance · Performance & Potential

URBAN LAND MARKETS

VACANT LAND ACROSS CAPE TOWN (GV 2022)*

Legend:
- Vacant Business
- Vacant Industrial
- Vacant Residential

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

Year	Built Business	Built Industrial	Built Residential
2012	14,0	54,5	4,3
2015	14,1	68,1	3,9
2018	19,8	73,8	3,7
2022	20,0	91,3	4,2

(Hectares of land)

VACANT LAND EXTENT BY SECTOR (TOTAL ERF EXTENT)

Year	Vacant Business	Vacant Industrial	Vacant Residential
2012	0,7	16,5	0,4
2015	1,5	10,9	0,1
2018	0,4	13,5	0,2
2022	0,8	10,6	0,2

(Hectares of land)

AVERAGE VACANCY RATE OF EXISTING BUILDINGS

- Commercial
- Industrial
- Office

METRO AVERAGE: VACANCY RATES PER SECTOR FOR 2022*

- 4,9%
- 5,4%
- 6,5%

Number of land parcels that are vacant by size

Erf Size	Commercial	Industrial	Residential
1) 1-250m²			
2) 251-500m²		1	
3) 501-1000m²		1	1
4) 1001-2500m²		6	1
5) 2501-5000m²	2	10	
6) 5001-10000m²		5	
7) >10000m²		1	

Source: City's General Valuation Roll and Market Reports
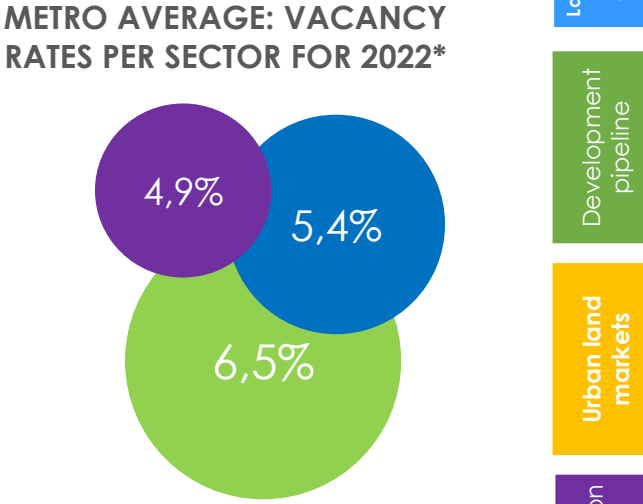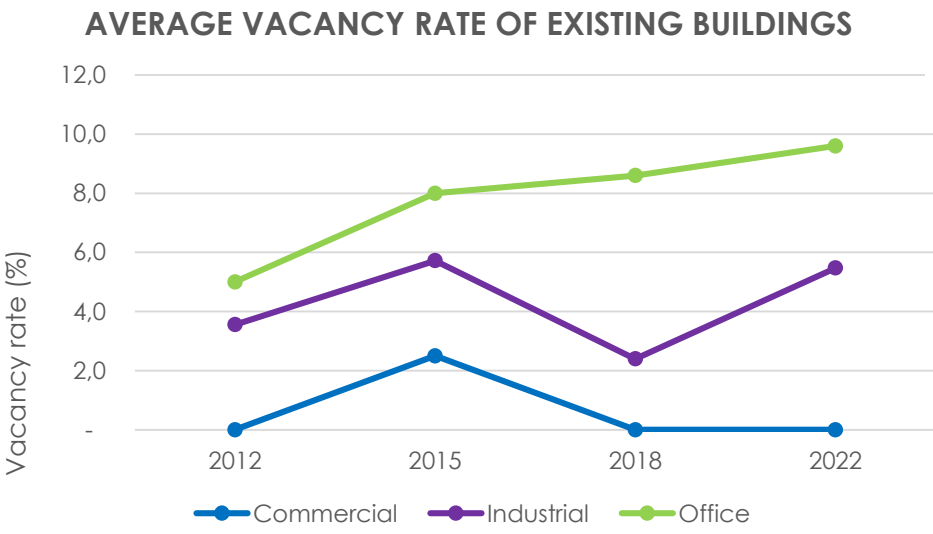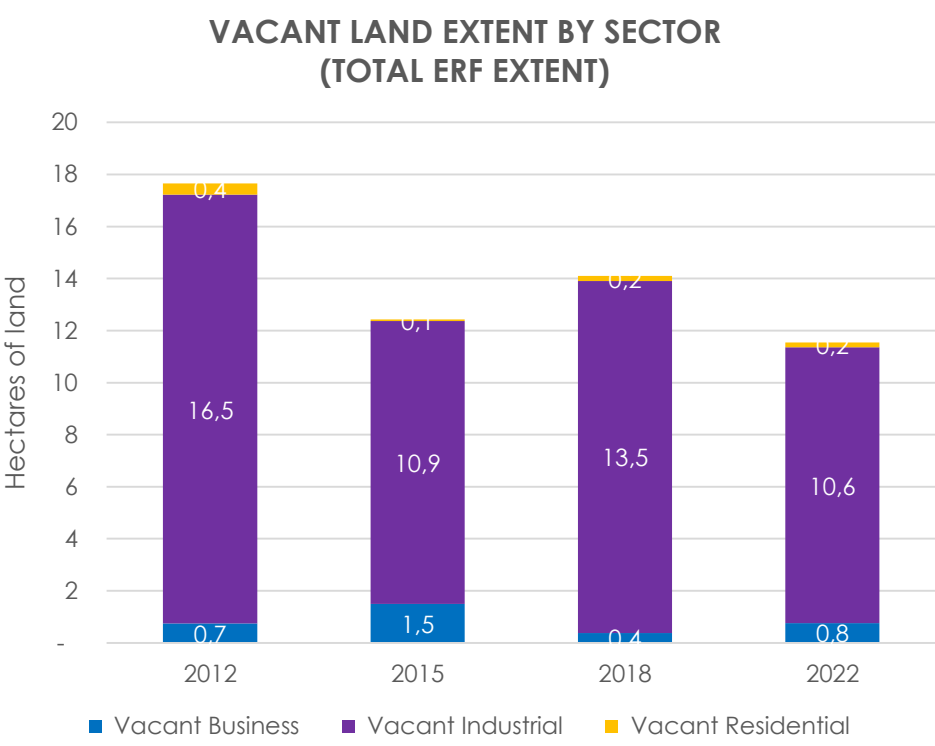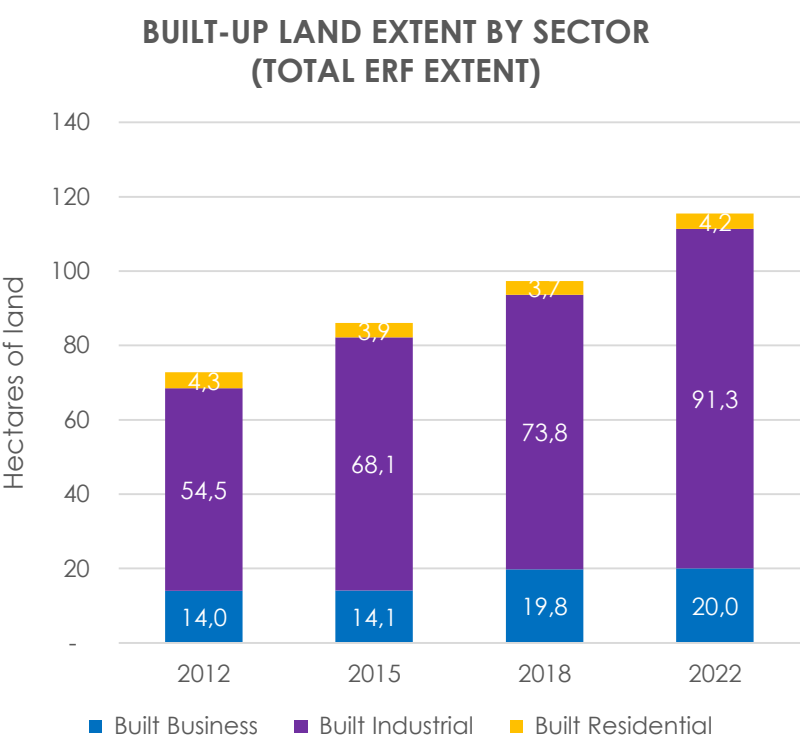
Vacant Land
The map illustrates the latest General Valuation Roll (2022) by showcasing vacant land across the metropolitan area. It complements the 2022 bar graph depicting available vacant land. The region has experienced growth in terms of the built-up land, with still a significant amount of vacant land available, as of 2022, indicating an opportunity to develop further. 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
Alongside vacant land, the vacancy rates for existing buildings in the industrial sector increased from 3,6% in 2012 to 5,5% in 2022. The office sector has also increased from 5% in 2012 to 9,6% in 2022.

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

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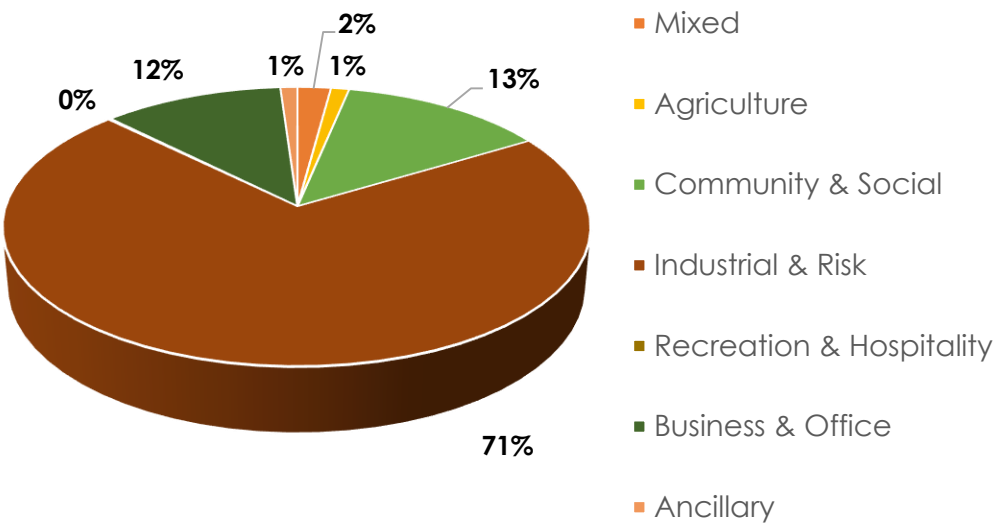
Urban land markets

Agglomeration of industries

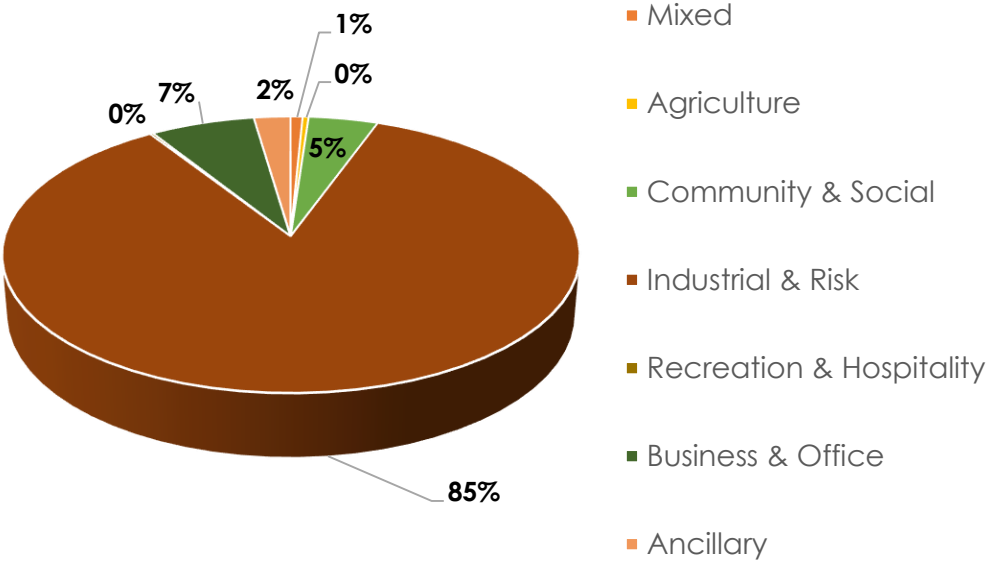Market performance

Performance & Potential

AGGLOMERATION OF INDUSTRIES

% OF LAND USE GROUPS (2012)

- Mixed — 2%
- Agriculture — 1%
- Community & Social — 13%
- Industrial & Risk — 71%
- Recreation & Hospitality — 0%
- Business & Office — 12%
- Ancillary — 1%

% OF LAND USE GROUPS (2022)

- Mixed — 2%
- Agriculture — 0%
- Community & Social — 5%
- Industrial & Risk — 85%
- Recreation & Hospitality — 0%
- Business & Office — 7%
- Ancillary — 1%
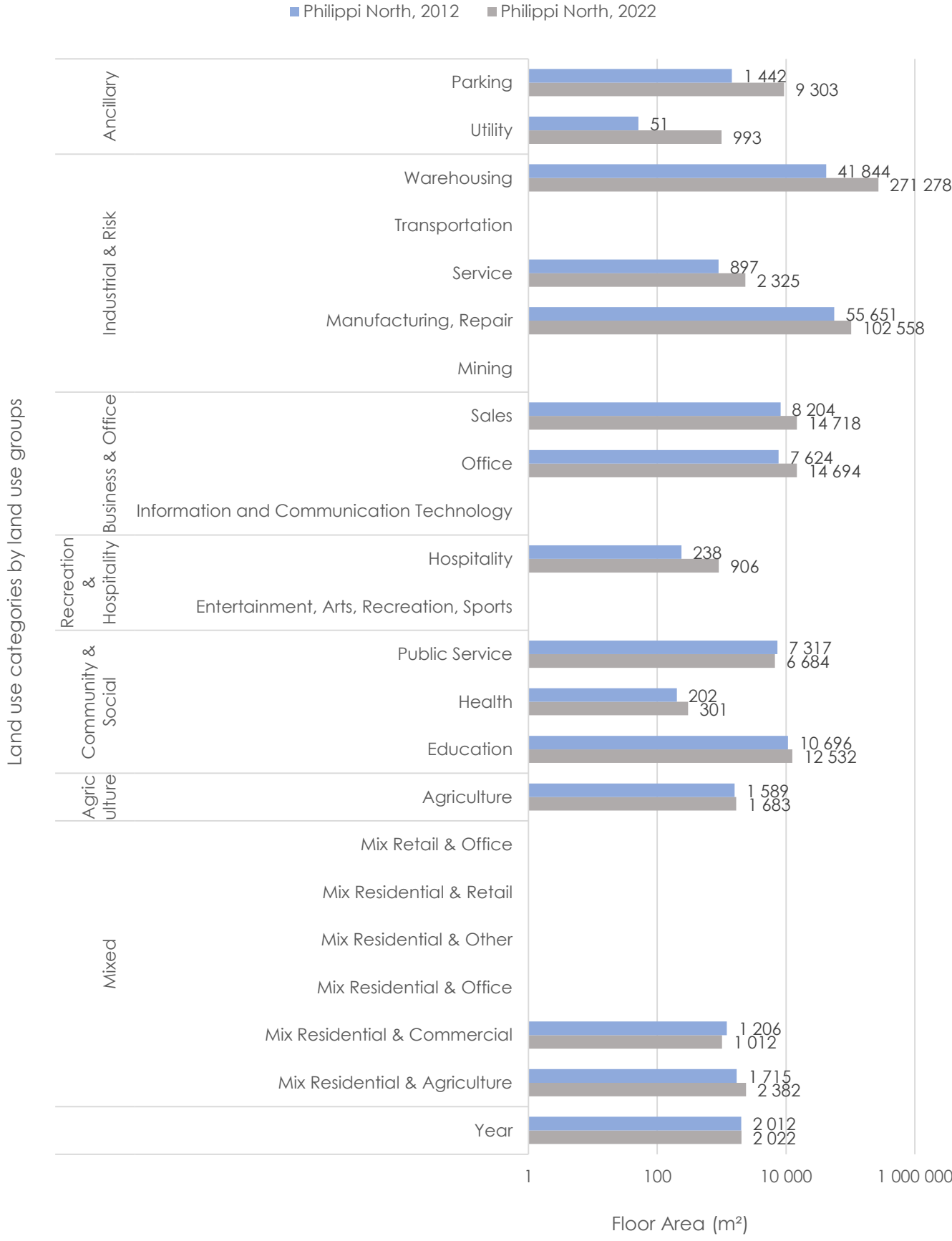
The pie charts illustrate the percentage distribution of land use groups in Philippi North industrial, based on the cumulative floor area (m²) across various land uses. As shown in the charts, the Industrial & Risk group has remained predominant in both 2012 and 2022 with an increase experienced from 71% to 85% in 2022. A significant decrease in both the Business & Office and Community & Social groups was experienced.

Additionally, the bar graph provides a comparative view of the co-agglomeration of land use categories between 2012 and 2022 within each land use group. The data indicates that manufacturing and warehousing maintained significant dominance compered to other land uses. There is also a presence of other land uses which can be seen to be in support of the most dominant land uses.

FLOOR AREA PER LAND USE CATEGORY FOR 2012 AND 2022

■ Philippi North, 2012 ■ Philippi North, 2022

Land use categories by land use groups

Land use group	Category	2012	2022
Ancillary	Parking	1 442	9 303
Ancillary	Utility	51	993
Industrial & Risk	Warehousing	41 844	271 278
Industrial & Risk	Transportation		
Industrial & Risk	Service	897	2 325
Industrial & Risk	Manufacturing, Repair	55 651	102 558
Industrial & Risk	Mining		
Business & Office	Sales	8 204	14 718
Business & Office	Office	7 624	14 694
Business & Office	Information and Communication Technology		
Recreation & Hospitality	Hospitality	238	906
Recreation & Hospitality	Entertainment, Arts, Recreation, Sports		
Community & Social	Public Service	7 317	6 684
Community & Social	Health	202	301
Community & Social	Education	10 696	12 532
Agriculture	Agriculture	1 589	1 683
Mixed	Mix Retail & Office		
Mixed	Mix Residential & Retail		
Mixed	Mix Residential & Other		
Mixed	Mix Residential & Office		
Mixed	Mix Residential & Commercial	1 206	1 012
Mixed	Mix Residential & Agriculture	1 715	2 382
	Year	2 012	2 022

Floor Area (m²)

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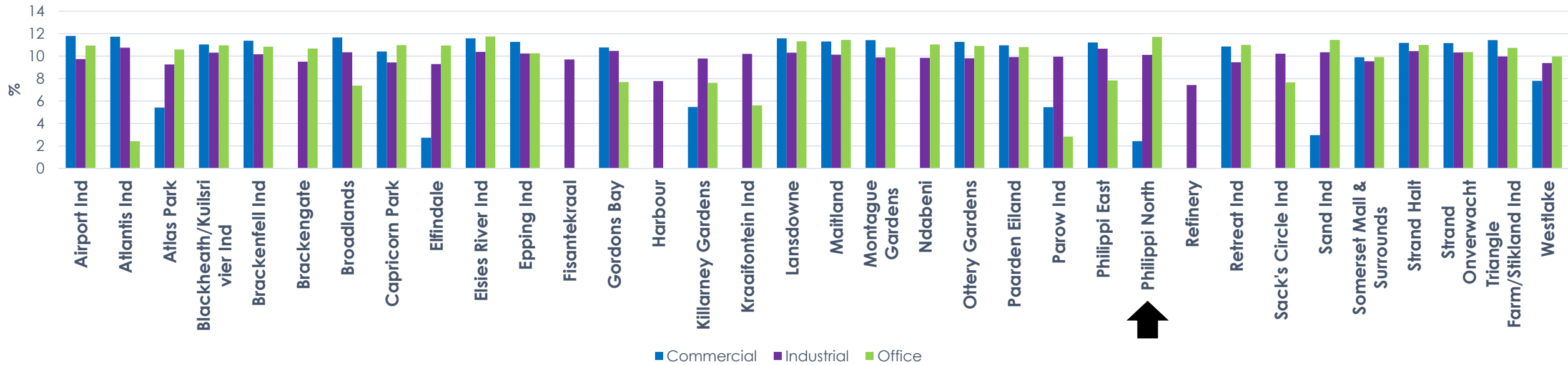Land use activities, employment overview & firm typologies

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MARKET PERFORMANCE

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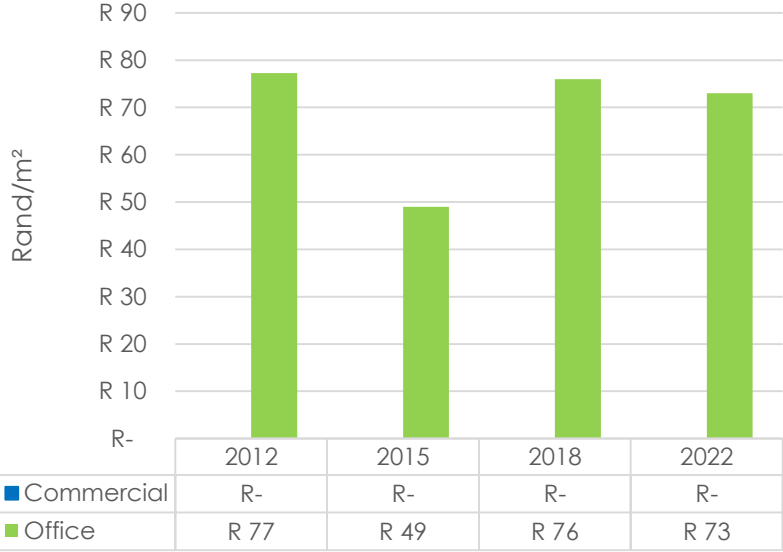

■ Commercial ■ Industrial ■ Office

INDUSTRIAL RENTALS

	2012	2015	2018	2022
1) 250m²	R 35	R 40	R 51	R 58
2) 500m²	R 50	R 34	R 51	R 58
3) 1000m²	R 33	R 42	R 43	R 54
4) 2500m²	R 29	R 39	R 47	R 51
5) 5000m²	R 31	R 41	R 28	R 37
6) 10000m²	R 27	R 33	R 37	R 38

COMMERCIAL AND OFFICE RENTALS

	2012	2015	2018	2022
■ Commercial	R-	R-	R-	R-
■ Office	R 77	R 49	R 76	R 73

CAPITALISATION RATES

—●— Commercial   —●— Industrial   —●— Office

Rental Rates

Rental rates across all industrial property sizes have gradually increased from 2012 to 2022, with higher rentals observed in the smaller properties.

Between office and commercial, office has been most prevalent in the area, with rentals fluctuating with an overall decrease between 2012 and 2022.

Comparative view on capitalisation rates

The average capitalisation rates from 2012 to 2022 for the commercial, industrial and office sectors were 2,44%, 10,12%, and 11,79%, respectively and further indicate its competitiveness relative to other industrial areas.

Year-over-year, capitalisation rates for the industrial sector have remained consistent in the 10,5% mark, whereas the office sector increased from 11,89% in 2012 to 12,6% in 2022.

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

Source: 2012 – 2022 market reports
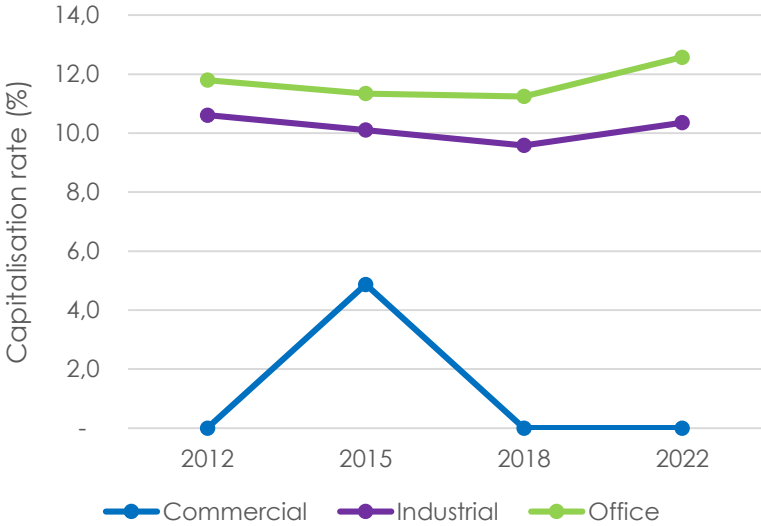
PERFORMANCE & POTENTIAL

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.

PERFORMANCE — Philippi North / Montague Gardens radar chart (Land Use Growth, Job Growth, Building Work, Commercial Vacancy Rate, Industrial Vacancy Rate, Industrial Cap Rate, Commercial Cap Rate)

POTENTIAL — Philippi North / Montague Gardens radar chart (Proximity to Public Transport, Commercial Vacancy Rate, Industrial Vacancy Rate, Vacant Commercial & Industrial Land, Vacant Residential Land, Incentive & Precinct Management Benefits)

	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

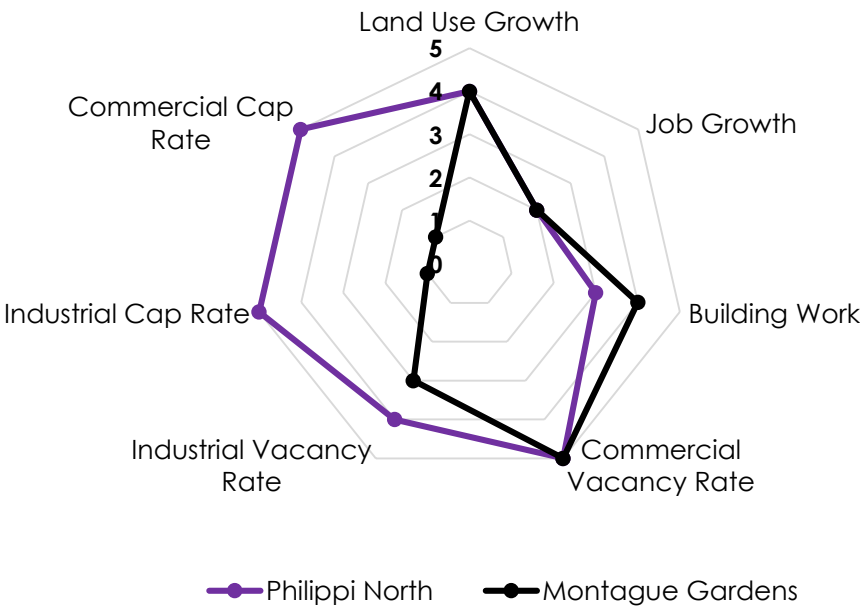Land use activities, employment overview & firm typologies

Development pipeline
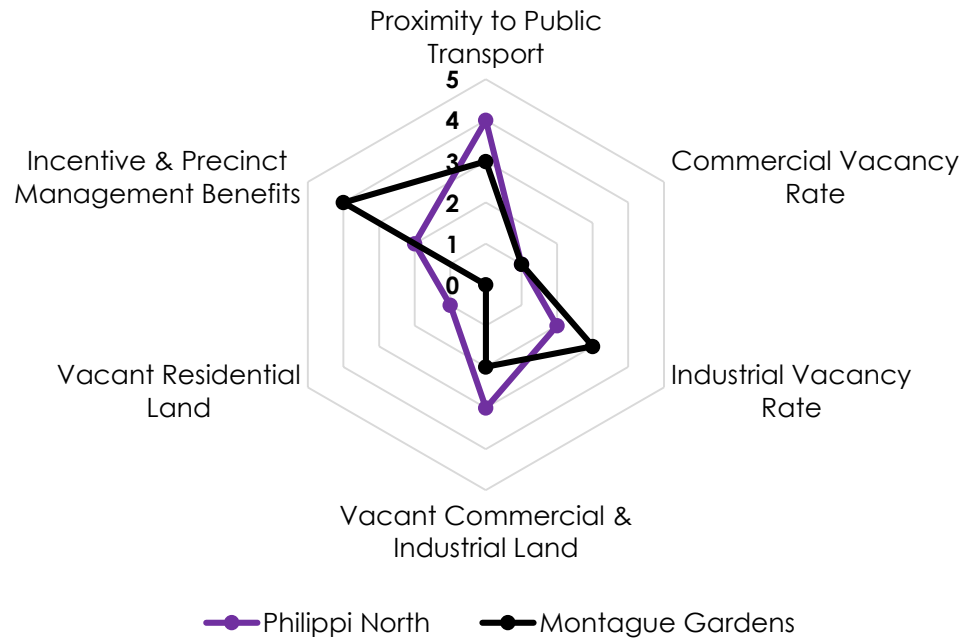
Urban land markets

Agglomeration of industries

Market performance

Performance & Potential