Department of the Premier

Report on the Economic and Socio-Economic State and Growth Prospects of the 12 Proclaimed Fishing Harbours in the Western Cape

November 2012
Final consolidated report

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EXECUTIVE SUMMARY

This report serves as the draft final output of the study on the economic growth and development prospects of the 12 proclaimed fishing harbours and their surrounds in the Western Cape, commissioned by the Department of the Premier jointly with the Department of Economic Development and Tourism and the Department of Agriculture.

The 12 designated fishing harbours are Lamberts Bay, Laaiplek, St. Helena, Saldanha Bay, Kalk Bay, Hout Bay, Gordon's Bay, Hermanus, Gansbaai, Struisbaai, Stilbaai, and Arniston.

The **project approach** has included an assessment of the current role of the fishing harbours, analysis of shifts in the fishing industry, benchmarking of international approaches to harbour revitalisation and market and value chain research. The strategic part of the report focuses on conclusions on economic opportunities and associated requirements; further detail on the state of the harbours can be found in the appendix to the report. As a strategic report, it has involved targeted information gathering interviews rather than exhaustive public participation processes or highly detailed analysis; the subsequent Department of Agriculture Forestry and Fishing and Department of Public Works planning processes have and will address these issues.

The **findings of this report will inform provincial government economic planning and strategy, as well as the DPW Spatial Development Planning process**. The findings of the report are also relevant to **discussions on the most appropriate approach to governance, management and operations of the harbours**, with the report contributing in terms of principles that could optimise the socio-economic contribution of the harbours.

An assessment of the role of designated fishing harbours in the fishing sector revealed that while fishing activity has declined in most harbours, the harbours will continue to have a key role to play in supporting both the industrial and small scale (linefish, rock lobster, abalone) fisheries. Industrial processing is consolidating into fewer harbours (mainly Port of Cape Town), and indications are that small scale fishing (with the exception of snoek) will continue to decline and become more marginal resulting in lower harbour activity. Fishing harbours nonetheless have a key role to play to support fishing communities to retain their way of life by capturing more value from their catch by means accessing processing and retail opportunities, service industry opportunities, and by providing entry to opportunities in other value chains such as tourism.

This project has also explored the potential role that harbours can play in the value chains of a range of other prioritised sectors in the Western Cape, including aquaculture, boatbuilding and repair, fine food, tourism, crafts and other creative industries (including film and performing arts). A "Fishing Harbour Route" based on Western Cape seafood, traditional fishing culture, sea-based eco-tourism and harbour events was identified a unifying theme to promote tourism particularly to the outlying harbours. As local seafood lacks diversity and authenticity, a "Seafood Western Cape" programme is suggested to promote the development of traditional and authentic seafood products, value-added seafood, and promote small scale fisher participation in the seafood value chain – whilst not limited to harbours, harbours could serve as a focal point and help to build brand identity and awareness.

The role of harbours within each value chain is different – in some cases fishing harbours are the dominant location for production activity in the sector (as in the case of fishing); at the other extreme are sectors where they currently have a limited contribution to the sector (e.g. fine food, crafts). The scale and growth prospects of these sectors are also very different, which should also be taken into account when considering the potential demand from these value chains in harbours in future. The table below provides a summary of the value chains, their relationship to harbours and their growth prospects.

Value chain	Est. turnover or similar measure in W. Cape	Est. # enterprises in W. Cape	Est. employment in W. Cape	Est. % of activity taking place in fishing harbours	Growth prospects
Fishing[1] Industrial Line fish	±R3bn ±R750m	2429 rights holders in primary sector	±22,000 ±4,000	±57%	Stable Declining
Aquaculture[2]	±R400m	26-	±2,000	±47%	Strong growth
Boatbuilding & repair[3]	±R400 – R800m	±50 - 100	±2,000 – 3,000	Rough est. <30% repair, <10% boatbuilding	Declined during recession, but growth potential
Foods (fine foods as sub-set)[4]	±R23bn agri & food & bev, fine food not known	> 100 in fine foods	-	Very limited, est. < 1%	Growing (agri-food more widely forecast 6 yr avg. growth of 2.3%)
Tourism[5]	±R25bn	-		tbd, v. rough est 20-30% marine-based tourism	Growing 6 yr avg. growth of 3.5%)
Crafts[6]	> R100m (2000 data)	>4,600 (incl. production & retail, sole traders & Cos)	± 13,000 -20,000	Very limited, est. < 1%	Growing, (est. 7 to 8% p.a. in 2009)
Other creative industries (film, performing arts etc.) [7]	Film: >R3.5bn (2006)	Film: >100	Performing arts: > 5,000 employed and freelance	Very limited, est. < 1%	Limited local reliable statistics / forecasts available; internationally creative industries often grow at twice avg. GDP grow rate

Table 1: Summary of value chains scale and role of harbours

[1] Own calculations based on Fishing Industry Handbook and own research
[2] Own calculations
[3] Own estimates and dti (2012) Scoping study on competitiveness and market development for the South African boatbuilding industry
[4] Western Cape Government (2012) Provincial Economic Review and Outlook; Western Cape Fine Food Initiative
[5] Western Cape Government (2012) Provincial Economic Review and Outlook; Western Cape Tourism Barometer
[6] TIPS (2009) CCDI Impact Assessment
[7] Cape Film Commission (2011) Draft film sector strategy, W Cape government MEDS study on performing arts

The **potential roles of harbours within value chains** are summarised in the table below.

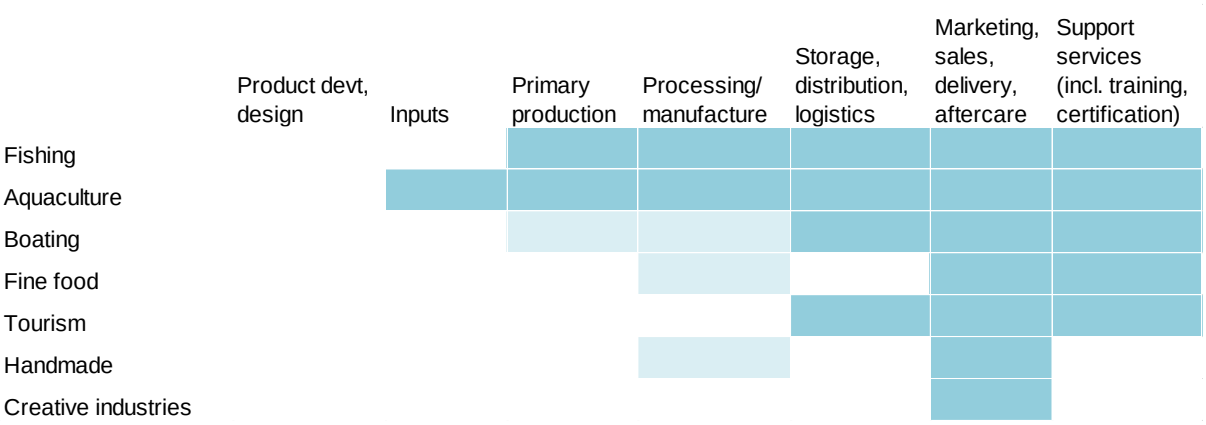


Figure 1: Potential roles of harbours within value chains

Having completed both the harbour assessments and the value chain analysis, the project team's **assessment of the most likely opportunities for community involvement and within each harbour** for the priority value chains are as follows (note that these opportunities will need to be further tested in collaboration with sector structures and local stakeholders).

Potential opportunities for members of fishing communities beyond involvement in primary fishing could include the following (although varying in each location and depending on individual capacities):

- Fish retail/market operators
- Restaurant and deli/ market operators / stall operators
- Value added traditional seafood products
- Aquaculture operations co-owners, service providers (e.g. feed, inspection, repairs, employees)
- Provisioning of boat charters and sailboats/powerboats
- Boat repair and cleaning – business owners, workforce
- Boatbuilding workforce
- Personal watercraft hire and storage
- Caterers e.g. for film shoots and events
- Co-owners and managers in some cases where all parties are willing– taking a shareholding in existing operators (as per Kalk Bay example)
- Craft production and retail
- Event organisation , festival participation
- Performers – music, dance, theatre, storytelling, etc.
- Public transport operators (as with Lamberts Bay kreef shuttle service)
- Parking operators and employees
- Tourism: Boat charter operators or employees, specialist guides, aquaculture tours and tastings
- Community-based accommodation in close proximity to harbours e.g. Arniston

Support required to enable community involvement is likely to include the following:

- Structuring of access to harbour premises and spaces to promote community participation e.g. initial voucher system, cross-subsidisation with larger operators, provision for seasonal leases and temporary use of spaces
- Enterprise and cooperative development support customised to target sectors
- Capacity-building / skills development for individuals

- Access to finance, including capital investment and working capital, including in areas such as boat repair food processing
- Marketing support to help secure a premium e.g. community caught fish, unique local products
- Support for compliance with standards and certification e.g. fish processing licenses, food safety compliance

A high-level assessment of the likely potential within each value chain per harbour is set out in the table below. More detailed analysis, consultation, and implementation planning will be required to determine and realise the specific opportunities for each harbour.

Potential value chain opportunities Harbour	Industrial fishing	Line fish, lobster & small-scale fishing	Aqua-culture	Boat-building & repair	Tourism & recreation	Fine foods	Creative industries: craft, film, performing, visual
Lamberts Bay		Y (very small)		Y (repair)	Y (small-scale, local community, domestic & international)	Y (lobster, other seafood, links to Cederberg – wine, rooibos etc)	Limited film craft (production and retail, seasonal) Community film & performance venue
Laaiplek	Y	Y (including small- scale net fishery)		Y (repair)	Y (small-scale, local community, domestic & international)	Y (incl. links to Bokkom Laan, other dried fish, restaurants)	Limited craft (production and retail, seasonal)
St Helena Bay	**Y**	**Y**	Processing	**Y** (repair, possibly fishing boatbuilding)	Y (small-scale)	Y (community fishing market access)	Limited film location, performance venue
Saldanha Bay	**Y**	Y	Y (sea-based, mussels, oysters, salmon inputs/ service industries, processing)	**Y** (repair, possibly fishing boatbuilding)	Y (small-scale, links to Langebaan)	Limited	Potential temporary performance venue
Hout Bay	Y	Y (incl. market)		**Y** (repair, storage, some boatbuilding)	**Y**	Y (restaurants, potentially market, local produce stall)	Film location Performance venue Craft production and retail
Kalk Bay		Y (limited catch, market)		Y (repair)	**Y**	**Y** (restaurants & market/deli)	Film location Performance venue Craft retail
Gordon's Bay		Limited		Y (repair)	**Y**	Y (but limited growth prospects)	Limited craft, film (retail, seasonal)
Hermanus		Limited	Y (land-based, abalone & base for	Y (repair, storage)	**Y** (local community, domestic & international)	**Y**	Limited craft, film

			ranching, inputs & service, processing)				
Gansbaai	**Y**	Limited	Y (abalone production, scope for services)	Y (repair, storage, some boatbuilding)	Y	Y	Limited craft
Arniston		Y		Limited (traditional boatbuilding?)	**Y** (domestic & international)	Y (in vicinity (community-based)	Film, craft in vicinity (production and retail)
Struisbaai		Y			Y (small-scale, local community, domestic & international)	Y (small-scale)	Limited craft retail, seasonal
Stilbaai		Y			Y (small-scale, local community, domestic & international)		Limited craft retail, seasonal

Table 2 : Assessment of the most likely opportunities within each harbour

Furthermore, in practice these opportunities will need to be coordinated across regions and harbours. For example, the ideas around festivals and pop-up/mobile food and performance venues could be best realised through cooperation across the harbours.

Based on the international benchmarking, stakeholder input and the project teams analysis, some **principles have emerged that should inform the approach to harbour revitalisation planning and implementation**. These include:

a. Harbours should be treated as a public asset

In order to optimise harbour's socio-economic impact, public funds may need to be used for harbour development (in particular marine infrastructure) and in certain cases for operational costs.

b. **Planning and strategy for harbours should be integrated into economic planning processes**

Relevant economic planning and strategy processes include Local Economic Development Plans, provincial micro-economic development and sectoral planning and strategy, as well as national sectoral and SEZ planning and strategy.

c. **Strong local involvement in harbour governance and management**

A one-size-fits-all approach is not appropriate, with potential approaches include:

- Nationally operated harbour
- Co-managed harbour with users
- Community operated harbour
- Municipally operated harbour
- Public-private partnership operated harbour

Management structures that support more than one harbour may be appropriate in some cases.

d. **Multi-stakeholder partnerships for implementation**

Relevant role players could include DEDAT, provincial Department of Agriculture, sector development agencies, LED departments, Local Tourism Offices (LTO), local business and community associations, **the dti**'s cooperative programme, and Wesgro. Coordination mechanisms could be established between Harbour Users Committees or their replacement structure and LED and tourism forums. Some possible initial projects have been identified in this project, which could serve as starting points to build a new cooperative approaches and demonstrate some benefits in the short to medium term.

e. **Unlock creativity of community and entrepreneurs**

Government should facilitate fishing harbour re-development primarily by institutional and regulatory means through the provision and maintenance of public infrastructure and focused public programmes which encouragement of self-reliance and individual enterprise, and on the unlocking of innovative capacity of the community.

- Stakeholders' innovative capacity is key to optimising the socio-economic development of the fishing harbours.
- Government should facilitate partnerships between local communities, users and private sector players (including local entrepreneurs) within a framework providing strong guidance on prioritisation and permissible uses to ensure optimal economic benefits for the region rather than just profit-taking by developers
    - The approach will also need to avoid onerous procedures and bureaucracy that will put off potential partners or hamper involvement of genuinely interested/committed investors and local communities.
- Promote preferential access and provide SME development support for previously disadvantaged persons, particularly in respect of fishing value chain entrepreneurial opportunities.

f. **Minimise red tape and bureaucracy, devolve day-to-day management from central government**

If a service or function can be performed by non-government agencies within a good governance framework which achieves the public good goals of fishing harbours, it should be devolved from government administration. For example:

- Separate out fishing regulation and inspection services from overall harbour management as a discreet function within fishing harbours.
- Contract out property management, security, and day-to-day maintenance etc.
- Infrastructure development and maintenance by the proposed harbour management entity – on behalf of DPW through provision of treasury grants e.g. through critical infrastructure /MIG.
- On-site harbour managers, part-time for smaller, full-time for larger harbours under authority of the harbour management entity.
- Provide some flexibility for different levels of local devolution in each case e.g. where strong interest and ability for community or user co-management.
- Enabling legislation to provide clarity and transparency on issues such as multi-sector purpose, jurisdictional issues, approach to user charges, etc. The current review of the MLRA provides an opportunity for revision of the current provisions on fishing harbours.

Areas **that are beyond the scope of this project**, but that should ideally be taken up, either by the DPW spatial and economic planning project or other research and consultation processes include the following:

- Information gathering on the historical and cultural significance of the harbours, in preparation for incorporating the unique heritage and traditions into the fabric of future developments in the harbour, including through visual arts and photography

- Investigation of the role of non-designated slipways and ramps and how they could be better regulated and managed in future, in particular during peak fish runs
- Participatory decision-making on prioritisation of the socio-economic role of each harbour within its local and regional context
- Further investigation of the most appropriate governance solution for each harbour, taking into account local governance capacity and willingness, as well as local, provincial and national economic planning and strategy
- Supporting infrastructure and service requirements in the vicinity of the harbours, including transport and utilities
- More detailed forecasting of potential scale of future growth in prioritised sectors relating to each harbour,
- Study on linking of harbours by means of a "Fishing Harbour Route" to promote value chains development for outlying harbours e.g. a fishing harbour with attractions such as fine food (Seafood Western Cape, regional wines), fishing culture, harbour events and eco-tourism activities such as birding, whales, sharks, etc.
- Spatial planning of harbours as venues for events such as festivals, sporting events, filming, craft fairs, community activities etc.

Possible examples of "quick wins" that could be implemented in 2013 include the following:

- "Save our Seabirds" festival collaboration
- Cooperation with WWF around community sustainably caught fish promotion and marketing, potentially developing over time into the wider "Seafood Western Cape" initiative
- Mobile / pop-up food venues during peak seasons and festivals/events
- Collaboration with MIASA and SAMSA around "Grow Boating" campaign and marine tourism e.g. sailing route, training, easy SAMSA certification
- Portable floating performance venues shared between harbours e.g. barge and grandstand

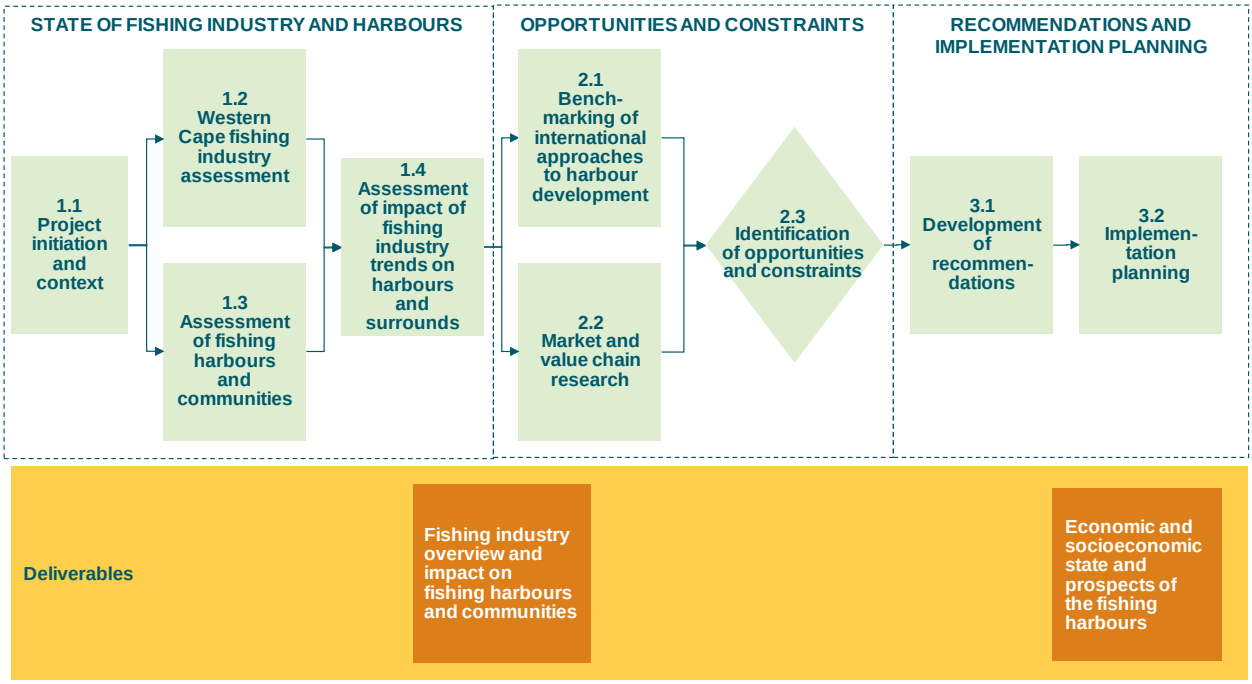
1 Introduction and purpose

The Department of the Premier (the "**DotP**") jointly with the Department of Economic Development and Tourism (the "**DEDAT**") and the Department of Agriculture (the "**DoA**") have commissioned a study on the economic growth and development prospects of the 12 proclaimed fishing harbours and their surrounds in the Western Cape. The study includes a report which, *inter alia*, investigates the impact of the declining fishing industry and the communities depending on them for their livelihoods and provides recommendations for their future development. This report provides the consolidated outputs of the project, including incorporating comments received from Reference Group members.

1.1 Project approach

The overall project approach, as illustrated in the figure below, was designed to meet the objectives of the Terms of Reference within the specified timings. The current state of the fishing industry and harbours were divided into four separate projects steps:

Figure 2: Overall project approach



Project step 1.1 involved the drafting of an overall project plan and research plan which included a high level review of policy and institutional framework for the fishing industry and harbours in the Western Cape and a high level investigation of international practice for harbour development

For project step 1.2, primary and secondary research was performed to gather available information on fishing industry. Furthermore, stakeholders were consulted on fishing industry performance, management and prospects. Based on this research and the consultations, the following assessments were made:

- Value chain dynamics and key locations, including institutional roles in the value chain;
- Industry issues, e.g., sustainability certification, shrinkage of processing capacity, IUU fishing, transformation, status of resource management;
- Industry trends, including export performance and trends;
- Industry SWOT; and
- Potential impact of draft Small Scale Fishing Policy on fishing activity.

Site visits to and interviews at each of the 12 proclaimed harbours with local authorities and local fishing stakeholders, and a high-level assessment of the state of infrastructure conducted (project step 1.3). These site visits and interviews covered:

- Fishing community – trends in levels of employment and income, socio-economic issues;
- Fishing rights and nature, scale and trends of fishing activities;
- Views on strengths and gaps in competitiveness of fishing;
- Fishing value chain and dynamics;
- Current harbour activities and facilities;
- Industrial activity in surrounding area;
- Retail and tourism offerings in surrounding area;
- Events and festivals linked to harbour/in surrounding area;
- Numbers of visitors and main source markets for visitors;
- Current/planned developments in related activities linked to the harbour; and
- Community development.

Finally, the impact of trends in fishing industry on fishing harbour activity and communities and the impact of the Small Scale Fishing Policy on harbours and communities were assessed for project step 1.4

Within Phase 2 of the project, Step 2.1 involved the investigation of international approaches to fishing harbour development through realising alternative economic opportunities. For Step 2.2, stakeholder consultations, interviews with industry players and secondary research into market attractiveness and value chains for potential opportunity areas were performed to gather potential opportunities for additional activities at harbours. For Step 2.3, potential opportunities and constraints or requirements were identified, drawing on market attractiveness and value chain research. Finally, in Step 3.1 and 3.2, recommendations on the characterisation of harbours and the principles for planning, management and implementation have been put forward, drawing on international benchmarking and stakeholder consultation.

1.2 Project background

The report on the economic and socio-economic state and growth prospects of the 12 proclaimed fishing harbours in the Western Cape is a timeous intervention given the history of decline and under-investment in fishing harbours. It is an opportune time to re-assess the objectives of these facilities, and to design new strategies to revitalise them to promote greater socio-economic dividends, particularly for local communities.

While the social and economic context of each harbour differs, the reasons for the general decline of the fishing harbours can be ascribed to a number of factors, including:

- the decline of the "linefish", abalone and lobster fisheries which has resulted in a significant decline in activity in the smaller fishing harbours;
- the concentration of industrial fishing operations into the larger ports;
- poor management and maintenance of harbour facilities forcing companies to operate from larger ports and private facilities; and
- A failure to recognise that the existing harbour governance and management arrangements are not conducive to promoting the emerging multi-purpose harbour usage rooted in the local economy of the surrounding settlements.

In the context of the **Small Scale Fishery Sector Policy**, fishing harbours can be regarded as the neglected lynchpin that can support development of local value chains to create viable small-scale enterprises, including a value-adding and services sector. The burgeoning tourism industry in the Western Cape in particular represents an opportunity for fishing-based enterprises to access in an innovative way by means fishery products and through the service sector. Seen in this light, fishing harbours present exciting opportunities for local economic development and socio-economic benefit to communities. It is important that their core purpose is retained as new fishery-linked value chain strategies are formulated to revitalise them; otherwise such activities run the risk of being replaced with more lucrative opportunities such as residential and commercial property development.

While the mandate for the management of the 12 proclaimed fishing harbours resides with the Department of Agriculture, Forestry and Fisheries ("**DAFF**") and the Department of Public Works ("**DPW**"), it is clear that in order to develop the value chain opportunities offered, an integrated governance approach is required which aligns national, provincial and local government mandates relevant to fishing harbours. The study was premised on the notion that if maximum socio-economic gains are to be obtained from fishing harbours they need to form part of local government spatial planning and local economic development. This intent appears to be supported by the Constitution which designates fishing harbours as being under the authority of local government. While the focus of the study is on value chain opportunities, governance recommendations are made to facilitate the realisation of the identified economic opportunities.

The project was designed to follow on from the Ernst&Young fishing harbours revitalisation study commissioned by DEAT (now DAFF) in 2008, and to feed into the 2012 DPW project on harbour spatial and economic development. Close collaboration between the study consultants and the DPW consulting team was maintained throughout the study to provide for a seamless transition to the spatial planning phase.

2 Policy and institutional context

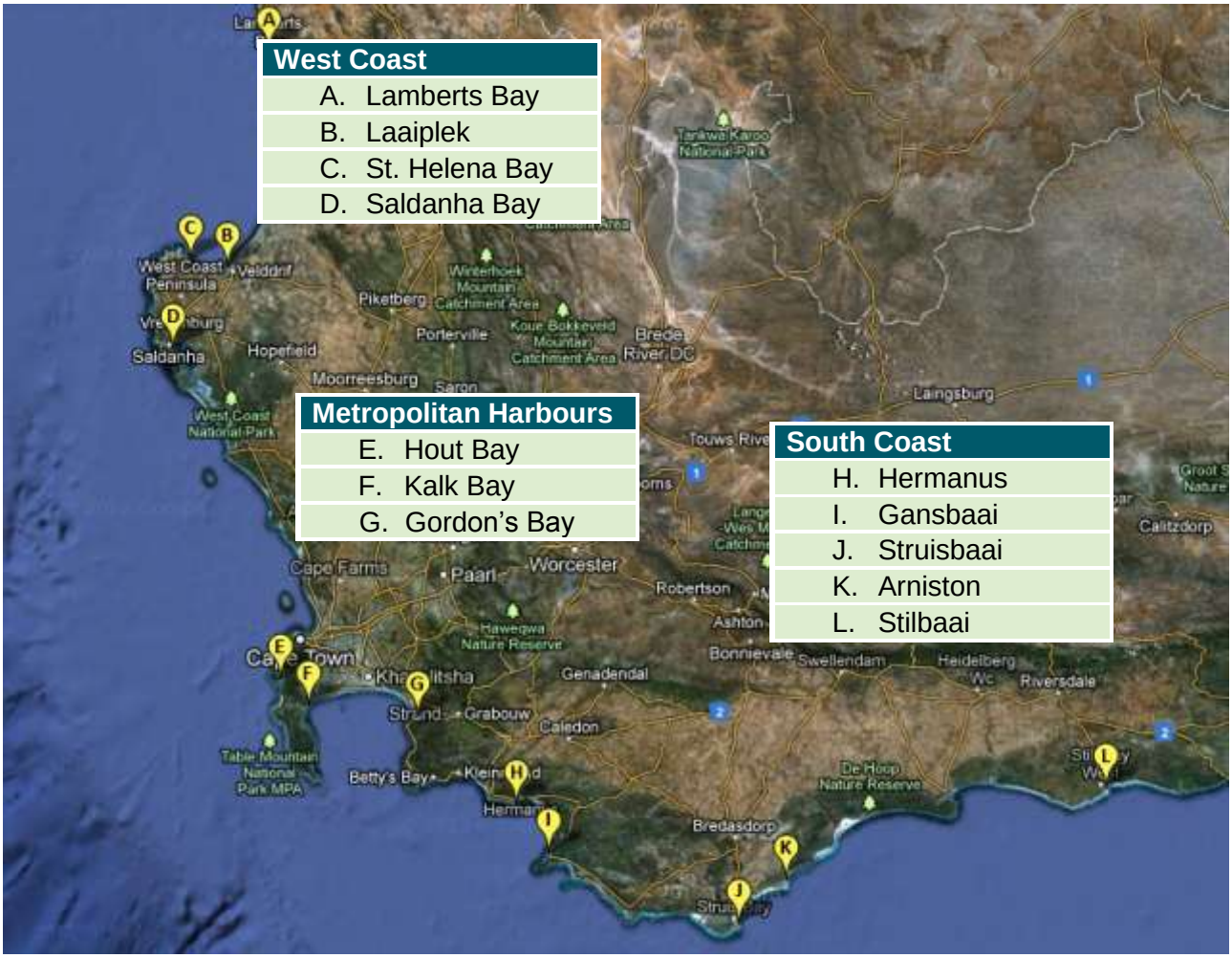
2.1 Historical context

South Africa's commercial fishing sector developed after the Second World War and enjoyed significant public sector support to develop the necessary infrastructure through the *Fisheries Development Corporation* ("**FDC**" or "***Viskor"***) a parastatal development finance institution which functioned along similar lines to the *Industrial Development Corporation.* One of its functions was the development and management of fishing harbours which it carried out until its closure in 1986 (Mr Roy Bross, Deep Sea Trawling Industry Association, April 2012). The management and maintenance of the fishing harbours was then transferred to what is now the Fisheries Branch of DAFF, and DPW respectively. This relatively loose governance arrangement has subsequently not been guided by any articulated policy or strategic management framework aligned with South Africa's constitution, environmental policies and legislation guiding provincial and local government mandates. In the absence of the professional management of fishing harbours as a distinct property portfolio and infrastructure supporting harbour based businesses, a situation of serious mismanagement and poor maintenance over the last 25 years has resulted in a degradation of these assets and consequent loss of socio-economic gains flowing from various sectors.

2.2 Local government context

The twelve proclaimed fishing harbours are often categorised within three areas in the Western Cape, namely the West Coast Harbours, the Metropolitan Harbours and the South Coast Harbours (see map below).

Figure 3: Locality of the 12 declared fishing harbours in the Western Cape Province



As indicated in the table below, the West Coast Harbours fall within the jurisdiction of the West Coast District Municipality, with its offices in Moreesburg. The Metropolitan Harbours fall within the jurisdiction of Cape Town Metro, with its offices in Cape Town and the South Coast Harbours fall within the jurisdiction of the Overberg District Municipality, with its offices in Bredasdorp.

Table 3: List of fishing harbours and associated District and Local Municipalities

Harbour	District Municipality	Local Municipality
Lamberts Bay	West Coast District Municipality	Cederberg Local Municipality
St Helena Bay	West Coast District Municipality	Saldanha Bay Local Municipality
Saldanha Bay	West Coast District Municipality	Saldanha Bay Local Municipality
Laaiplek	West Coast District Municipality	Bergrivier Local Municipality

Hout Bay	Cape Town Metro	Cape Town Metro
Kalk Bay	Cape Town Metro	Cape Town Metro
Gordon's Bay	Cape Town Metro	Cape Town Metro
Hermanus	Overberg District Municipality	Overstrand Municipality
Gansbaai	Overberg District Municipality	Overstrand Municipality
Arniston	Overberg District Municipality	Cape Agulhas Local Municipality
Struisbaai	Overberg District Municipality	Cape Agulhas Local Municipality
Stilbaai	Overberg District Municipality	Hessequa Local Municipality

2.3 Policy governing fishing harbours

Whilst the management and maintenance of the required infrastructure of the proclaimed fishing harbours is delegated to DAFF and DPW respectively, a fundamental shortcoming underlying the well-documented management failures in respect of fishing harbours is the absence of a Fishing Harbour Policy to guide their governance. Day-to-day management issues such as leases are dealt with through a DAFF/DPW Harbour Management Committee; with input from Harbour Users Committees appear inadequate for the task at hand. Thus, while it is acknowledged that fishing harbours are a public good, the scope of their purpose in serving society is not clear, and no policy exists on how to achieve the best socio-economic returns from these assets. This need was recognised by the Department of Agriculture, Forestry, and Fisheries in 2008, resulting in the commissioning of an extensive report by Ernst and Young on options for harbour development to achieve optimal socio-economic benefits. While the report recommendations have yet to be implemented, they do provide a very comprehensive evaluation of options for harbour revitalisation, including governance institutions and financial models. As such, the report provides the foundation for a fishing harbour policy. A brief perspective on the evolution of harbour policy and governance is provided below.

Historically, the harbours and their management were designed around a single purpose, namely to provide essential infrastructure to develop the fishing industry. Fishing harbours were developed and run by FDC, dedicated to serving the needs of the fishing industry in a similar way to aspects of Portnet and the Industrial Development Corporation. With the transfer of fishing harbours to DAFF and DPW, the industry service orientation of the FDC was largely lost. However, with the fishing harbour infrastructure in place and the fishing industry in a mature phase, the transfer of fishing harbours to DAFF and DPW in 1986 does not appear to have been recognised as being potentially problematic at the time.

Over the last two decades the fishing industry has evolved, with an industrial fishing operations concentrating into the larger ports, and small-scale fishing operations at the smaller fishing harbours declining. This has resulted in a *de facto* shift to multi-purpose usage in some harbours as tourism, recreational boating and sea based eco-tourism charter enterprises have moved in. An absence of policy to guide the equitable governance and appropriate management of these new uses underlies many of the conflicts besetting fishing harbours utilisation. It is seemingly anomalous that DAFF has developed sophisticated and legally robust rights allocation policies to govern the use of state resources under its jurisdiction such as fish stocks, boat based whale watching and shark cage diving, but neglected to promulgate any policy on the governance and use of fishing harbours as a public good. As a consequence, DAFF and DPW officials have no policy guidance for harbour development plans that are integrated into a local economic development context or management protocols to inform their management actions. Formal management is anachronistic in many instances as it narrowly addresses the needs of fishing industry harbour users, and while non-fishing activities appear

to be somewhat accepted in certain harbours, in the absence of a policy, planning and regulatory framework, the governance and management of these activities is by default rather than by design. This introduces a lack of accountability on the part of the responsible officials in DAFF and DPW, which on the one hand discourages them from decision making in response to user needs as they lack policy guidance, and on the other exposes them to undue influence by commercially opportunistic individuals seeking preferential access to harbour property.

While an articulated policy on the purpose of fishing harbours does not exist, a DAFF report entitled "Transition Management of the Proclaimed Fishing Harbours" recognises that fishing harbours should serve a broader socio-economic purpose based on principles of good governance (DEAT, 2008c). This comprehensive study, conducted by Ernst & Young and SAHA International, outlined the status and socio-economic context of fishing harbours and presented options for governance, institutional arrangements and management. A rationale and legal basis for developing governance arrangements conducive to the local economic context and *de facto* uses of the harbours is presented. In essence, study provides guidance for the development of a fishing harbour policy which would seek to maximise the socio-economic benefit of harbours based on a set of best practise guiding principles.

The DAFF (2008c) report motivates "A New Approach to Harbour Development and Management" which is worth quoting in full:

> *"From a socio-economic perspective the proclaimed fishing harbours that form the subject of the current study are an integral part of the public infrastructure of the hinterlands within which those harbours are located. For this reason the development and management of those harbours must be consistent with the imperatives of the hinterland communities they serve and with the economic environments within which they function. To this extent the development and management of the fishing harbours has to be informed by socio-economic developmental good practise in precisely the same way as does the development of the hinterlands of which those harbours form part. The optimisation of the socio-economic development leverage that the fishing harbours bring to the hinterland communities they serve therefore intimately depends upon the adoption of a new development and management decision making paradigm for these harbours. Sustainable socio-economic benefits from the harbours is therefore much less a matter of short term ad hoc interventions than it is of medium- to longer term reform in the way that key decision relating to the development and management of the harbours are made and the degree to which socio-economic imperatives can be brought into the mainstream of decision making relating to these harbours. To that extent the institutionalisation of key decision making tools within a fundamentally restructured approach to the decision making relating to the harbour is the main present imperative in pursuit of improved socio-economic performance of those harbours.*
>
> *In addition the role of government and its agencies in regard to the development of the fishing harbours needs to be informed by international good practise relating to the role generally of government in developmental processes and particularly to that of national and provincial government. This suggests that the role of government and its agencies generally is to facilitate development primarily by institutional and regulatory means through the provision and maintenance of public infrastructure and focused public programmes rather than in the first place in the role of "entrepreneur". The sustainability of socio-economic development interventions is generally predicated on the encouragement of self-reliance and individual enterprise, and on the unlocking of innovative capacity of the community. This applies equally to the development of the*

proclaimed fishing harbours where in the spirit of the local economic development (LED) approach government and its agencies should not be seen as the central player but as a key player amongst many stakeholders whose innovative capacity is key to optimising the socio-economic development of the fishing harbours. It is therefore in the first place for government to establish a firm and clear policy framework and planning and regulatory regime within which all stakeholders are able to contribute to the development of the fishing harbours and the realisation of the socio-economic objectives or their hinterland communities. To attempt ad hoc socio-economic development interventions for whatever reason in any of the harbours outside of the context of such a policy and regulatory regime would be to risk compounding the difficulties that most harbours face in terms of their institutional and functional disjunction with the development of the hinterland they serve."

The DEAT 2008 report on "Transition Management of the Proclaimed Fishing Harbours" correctly identifies harbours as a unique public good which is integral to the local economic context of the hinterland they serve. Strategically, the governance of fishing harbours should thus be aligned with local economic development ("**LED**") strategy and spatial planning. Integration of harbour development into a LED context dictates that cooperative governance arrangements involving local, provincial and national government are required in order to realise the economic opportunities and socio-economic leverage that harbours potentially offer. This conclusion is supported by a review of legislation relevant to the governance of fishing harbours.

2.4 Key legislation relevant to fishing harbour governance

In order to address the policy vacuum that exists in respect of fishing harbour governance, and the institutional failures inherent in the DPW/DAFF management of these public facilities and their use, it is necessary to seek guidance from South Africa's legislation and higher level policy goals flowing from the Constitution. A synopsis and review of legislation pertinent to fishing harbour governance is provided in the DAFF harbour report carried out by Ernst & Young (DEAT, 2007, Appendix I Metropolitan Harbours Legal Report and Conclusions).

The maintenance of the required infrastructure of the proclaimed fishing harbours is the responsibility of DPW. In terms of the Constitution of the Republic of South Africa ("**RSA**"), 1996 (Act No 108 of 1996) and the annual Appropriation Act, the President has allocated a functional mandate to DPW. The State Land Disposal Act (Act No 48 of 1961) furthermore mandates the Minister of Public Works to carry out certain functions. According to the legislation, it is DPW's mandate to be the custodian and manager of all national governments' fixed assets, for which other legislation does not make another department or institution responsible. This includes the determination of accommodation requirements, rendering expert built environment services to client departments, the acquisition, maintenance and disposal of such assets. Currently, DPW is responsible for the maintenance and repair projects of harbour as well as the management of leases of DPW properties within harbour precincts.

While DAFF is mandated to manage the seaward activities related to harbours and collect fees for access to and use of harbour facilities, surprisingly little guidance on harbour governance is provided by Marine Living Resources Act of 1998 (the "**MLRA**") which simply states:

- *27. (1) Subject to subsection (2), the Minister may by notice in the Gazette declare a harbour or a defined portion of a harbour or a defined area of the sea and the seashore, to be a fishing harbour.*
- *(2) If the Minister desires to declare a commercial harbour or a portion of such harbour to be a fishing harbour, he or she shall obtain the prior approval of the Minister of Transport*

- *(3) The Minister may, in consultation with the Minister of Finance, determine the fees payable in respect of the use of a fishing harbour of the facilities available in such a harbour.*

The MLRA regulations promulgated in 2004, Part, Regulations 88 – 95 make an additional provision for the management or harbour related property in Section 88, visibly:

- *Except on the authority of a permit, no person shall or shall cause any other person to erect, acquire, build, lease, control or use any building, facility or works, within any fishing harbour, in the sea, or on the sea-shore or on any land adjacent to a fishing harbour.*

The latter clause requiring a permit to "erect, acquire, build, lease, control or use any building, facility or works" on "any land adjacent to a fishing harbour" is possibly unconstitutional as it appears to place a limitation some existing private property rights.

The most significant feature of the MLRA is its silence on governance arrangements for fishing harbours, particularly the constitutional provision that places fishing harbours under the authority of local government.

In respect of cooperative governance and the role of municipalities, the DEAT (2007) report identifies the following relevant legislation:

- **The Constitution**. Schedule 4 of the Constitution of the RSA, 1996, with regards to functional areas of concurrent legislative competence, provides that local government has authority over "Pontoons, ferries, jetties, piers and harbours, excluding the regulation of international and national shipping and matters related thereto." The DEAT (2007) point out that "this provision is however subject to section 155(6)(a) and (7) of the Constitution which inter alia provides that National Government have legislative and executive authority to see to the effective performance by municipalities of their functions in matters so listed."

- **The Integrated Coastal Management Act ("ICMA")** objectives include:
  - To provide for the coordinated and integrated management of the coastal zone by all spheres of government in accordance with the principles of co-operative governance;
  - To preserve, protect and enhance the status of coastal public property as being held in trust by the state on behalf of all South Africans, including future generations;
  - To secure equitable access to the opportunities and benefits of coastal public property; and
  - To give effect to RSA's obligations in terms of international law regarding coastal management.

On the basis of the above legislation, the report concludes:-

> "*The intention in both sources is clear that the National Government and the relevant coastal municipalities share concurrent responsibilities with regards to harbours. Coastal municipalities will therefore have to be consulted with regards to further development and upgrading of harbours". DEAT, 2007 - Appendix I, Legal Report and Conclusion, P326*

There are very practical legal reasons why fishing harbours should fall under shared national and local government authority as it enables:

- Integrated spatial planning and service provision. For example, the planning permission, building inspection and so on within harbours is not subject to municipal authority and by-

laws. Harbours are thus currently "islands" divorced from LED driven spatial development planning, implementation and finance.
- Integration into municipal enterprise development services to promote SME development. Harbours are seen as a key lever for promoting SME development and it is thus logical that municipal SME development capacity is harnessed.
- Enforcement of compliance with local by-laws and deployment of municipal environmental compliance personnel or police to act if required within harbour precincts. This is particularly important in the context of the current use of harbours such as Hout Bay as landing points for poached abalone and rock lobster.

2.5 Previous investigations into harbour governance and management models to promote local socio-economic gains

The DEAT (2008c) report recognises the key role that local government should play, and provides clear guidance on the development of a good governance approach which will promote maximisation of socio-economic gains from fishing harbours.

The starting premise is that "the primary economic absolute advantage of harbours over other development areas lies in the fact that they provide boat access to the sea, generally established and maintained at a significant cost. The value of land in harbours needs to reflect that fact. Harbours in this sense represent "special places: and land and facilities in harbour precincts cannot in an important sense be equated with industrial or other commercial land in other areas."

The primacy of fishing as the core activity in harbours is recognised and a strategic planning approach to securing the tenure of this sub-sector in harbours is proposed, particularly in respect of traditional fishers who generally lack shore based facilities to add value to their catch by means of processing and storage facilities and retail seafood outlets.

Key questions to guide what other activities should be located in fishing harbours are:
- Does this activity belong in the harbour at al or can it be accommodated elsewhere in the hinterland area?
- If it does belong in the harbour does it represent the highest and best use of harbour land in the service of socio-economic, financial, environmental and institutional considerations?

In order to achieve the maximum socio-economic advantage, the kinds of business and other activities that are supported within harbour precincts should be those that most directly:

- Preferentially generate jobs for the members of identified disadvantaged communities within the hinterland areas of the harbours concerned;
- Preferentially generate the highest income per job for member so the identified disadvantaged communities;
- Reflect a particular need to be located within the harbour precincts that cannot be met at some other location within the hinterland. Such activities should exclude general wholesale and retail activities but should include the provision of necessary services to harbour workers and harbour personnel (for examples take-away foodstuffs, cigarettes, etc); activities supporting "front-line: fishing, marine and marine maintenance; and activities supporting harbour-based tourism as opposed to those supporting general hinterland tourism which could be accommodated elsewhere within the harbour hinterland space: and

- Optimise on accessibility and parking space. Land within harbours generally is at a premium and should not be used for parking to the exclusion of other "higher and better use activities" in terms of socio-economic leverage.

A scorecard methodology is proposed for balancing the four components of sustainability, namely:

- socio-economic dividend to the community;
- financial dividend to the harbour authority;
- environmental dividend or cost; and
- institutional dividend or cost.

Furthermore, a water proximity zoning scheme is proposed which gives provides preferential waterfront access to businesses dependent on vessels, and places service industries, parking and so on further back.

With the foregoing in mind, the DEAT 2008 harbour report points out the shortcomings of the current harbour management arrangements and proposes a programme to integrate harbours into the governance of the web of public infrastructure which serves the hinterland community – further motivating why harbours should be included within the sphere of local government:

> *Harbours form part of the public infrastructure web whose ultimate role is optimally to serve not the harbour per se but the entire hinterland community. In addition the Constitution speaks clearly to the intention that harbours should fall under the jurisdictional control of the municipalities of the hinterland of which they form part. Yet at present management and development of proclaimed fishing harbours takes place largely outside of the context of hinterland development. The present structure of Harbour Steering Committees comprising only harbour users for example holds the real danger of enabling the use of public infrastructure and resources in effect to be colonised by parochial user interests at the cost of wider socio-economic benefit to the community at large. In addition, key socio-economic development mandates typically lie outside the skills sets of DEAT:MCM* (now DAFF) *and the Department of Public Works currently charges with the management of the proclaimed fishing harbours. Whilst mandates relating to local economic development within harbour hinterlands reside amongst others in terms of Sections 152 and 153 of the Constitution in the municipal sphere with district and local municipalities, there generally is no structured integration of harbour development and development planning at the harbour boundary to the ultimate potential detriment of asset values and socio-economic leverage."*

The DEAT (2008c) report is categoric in emphasising that the only way in which harbours can play their rightful role in serving the socio-economic imperatives of local communities is through a programme of integration of harbour management and development with local economic development planning and development in the socio-economic hinterlands of which those harbours form part. The report emphasises that:

> *Only in this way will harbours in effect play their rightful role in serving the socio-economic imperatives of local communities and can synergies between harbours and communities they serve be effectively and on an ongoing basis be identified and exploited. In particular, the development of specific options for harbour development cannot be undertaken outside of the context of fully interactive and joint planning. The programme must incorporate both organisational and institutional arrangements to*

> *reform the governance of harbours in such a way that integration of development planning and management are achieved.*

Moving on to the characteristics of the harbour management authority, DEAT (2008c) emphasise that:

> *This is seen to be the single most critical leverage point for the creation of socio-economic value within harbours, namely a competent harbour authority constituted to reflect the relevant jurisdictions, most particularly including the local government sphere. Such a harbour authority needs to be informed by institutional arrangements to ensure full participation by all interested and affected parties in the formulation and adjudication over time and on an ongoing basis of harbour development options. Economies know few functional borders and effective local economic governance requires that the institutions serving development of the harbours and their hinterlands should reflect that fact.*

Outsourcing of a number of key harbour services is identified as a key to efficient delivery in an outcomes-based development management environment. Evidence collected from harbour site visit interviews indicates that the current DAFF/DPW management arrangements have compromised service delivery and constrained both efficient fishing industry function and local government LED strategies. A number of instances were identified where firms had relocated away from fishing harbours to larger ports or privately owned land. In determining whether government should operate a particular service DAFF report requires that government ask the following of any in-harbour activity that it currently performs:

- *Can government or its agency/ies provide the service at the required levels? If not, then it should be outsources or privatised to someone who can;*
- *If government or its agencies can provide it, then can the service be provided by someone else better and/or more cheaply and effectively? If not, then government must do it – if yes, then it should be outsourced or privatizes.*

To this extent, the following harbour activities prima facie suggest potential for outsourcing:

- *Access control*
- *Harbour security*
- *Slipway management*
- *Parking*
- *Repair and maintenance services; and*
- *Cleaning and sanitation services*

It is proposed that such services offer preferential SMME opportunities for new entrants to the business spectrum, provided that specific mentoring, training and support strategies are provided through cooperatives and the medium of “Red Door” and municipal development centre initiatives. A participative, phased process for unlocking optimising the socio-economic development dividend of fishing harbours is proposed based on the principles outlined above with:

> “*government as facilitator and regulator providing broad strategic direction, and predominantly private enterprise giving effect to sustainable development on the ground within the policy frameworks established by government and its agencies.”* (DEAT 2008c, Harbour Project Final Report)

The phases are proposed as follows:

Phase 1 Engaging with all relevant stakeholders and jurisdictions

The process of redefining the institutional and other frameworks to guide the development of the fishing harbours going forward is not a matter for the Departments of Public Works (DPW) and Environmental Affairs and Tourism (DEAT – now DAFF) *alone that presently have jurisdiction over the harbours, but also of all prospective partners and stakeholders in a new harbour dispensation, not least the relevant hinterland municipalities.* ***The constitutional intent that municipalities should play an important role in managing harbours in their jurisdictions must be respected in both the letter and the execution*** (current report's emphasis).

Phase 2: Jointly establishing an appropriate harbour management authority with suitable jurisdiction and mandate

The harbour management authority in both its establishment and operation must be mandated to carry out the programmed approach proposed above for the optimisation of the socio-economic dividend of the harbours.

Phase 3: Application of the programmed approach recommended above

The programmes identified represent the high leverage points for socio-economic value creation within the proclaimed fishing harbours. As such their implementation by the harbour authority as a matter of key institutional focus represents the single most significant value creating opportunity across all the harbours.

Management models for an "Integrated Harbour Management Authority" (IHMA) are identified and evaluated by Ernst & Young and SAHA international in the DEAT (2008c) report. The report motivated that the:

> *"(…) recommended future management structure must be* ***inter-governmental*** *in nature. Based on the co-operation principles acknowledged in the Intergovernmental Relations Framework Act and the Constitution of the Republic of South Africa, 1996 and the overlapping interest that currently exists within the various spheres of government with regards to harbour land, it is logical to reduce the public resources duplication into a single institution with optimising of these management functions."*

The overall concept of an IHMA appears sound, and DAFF harbour report considers the advantages and disadvantages of different management models for the proposed IHMA. These include:

- A PPP (e.g. Chapman's Peak)
- A National Public Entity (e.g. South African Tourism, SANParks)
- Private or Section 21 Company (e.g. V&A Waterfront)
- Trading Entity/ Account (e.g. Government Motor Transport)
- Government Business Enterprise (South African Rail Commuter Corporation - SARCC)
- Private Entity/Company
- Inter-governmental Authority (e.g. new initiative – hybrid of Trading Entity and Public Entity)

After identifying the advantages and disadvantages of these management models and associated entities, Ernst & Young suggested a two-step management model process to establish the organisation of an IHMA:

1. Set up a government run **Trading Entity** into which current capacities are incorporated and within in which additional management capacity is built; and

2. Develop a fully accountable **National Public Entity** that must be Inter-Governmental in nature.

It is understood that the task of recommending what type of entity should be responsible for harbour management has recently been allocated to the National Treasury, who will advise both DAFF and DPW on an appropriate harbour management entity [8]

[8] Mr Lucas Williams, DAFF, personal communication, September, 2012

3 Assessment of fishing harbours and communities

3.1 Introduction

In this section of the report, an overview is provided of the current state of the fishing harbours and the socio-economic context of the surrounding communities, including current levels of activity in both fishing and related sectors. The harbours are discussed in within the three geographical regions.

3.1 Overview of the different roles of harbours within diverse socio-economic contexts

The nature of the role of fishing harbours can vary significantly depending on their context. Elements within the context that impact on the role include the following:

- The nature and sectoral composition of the economy in the harbour's hinterland
  - Including the extent to which the harbour is still an active fishing harbour
- The extent of integration of the harbour into its surrounding community, both in terms of physical access and visibility, and the sense of ownership from the community
  - The degree of community cohesion and shared identity related to the harbour is also of significance
- The size of the community and scale of economic activity (including size of visitor numbers) to the area
  - In addition, the remoteness of the harbour from major economic activity
- The dynamics of poverty, wealth and inequality in the harbour vicinity

How these dynamics play out in the context of each harbour is addressed in the sections below.

3.2 West Coast harbours

3.2.1 Regional socio-economic context

The West Coast District Municipality is situated along the Atlantic Ocean. The District Municipality occupies 31,101km^2 of land. The district is divided into five local municipalities, namely, Matzikama, Cederberg, Bergrivier, Saldanha Bay and Swartland. The West Coast district is home to 258,974 people, the fourth largest district in the province.[9]

The West Coast District Municipality's key economic sectors are:

- Agriculture and fishing
  - Agricultural products include grapes, wines, wheat, rooibos tea and fruit. The fishing activities include rock-lobster fishing, line fishing and deep-sea fishing, among others.
- Manufacturing
  - There is a strong manufacturing sector, with production activities in the district, including agri-processing, fish processing and mineral processing.
- Mining
  - The district has a sizeable mining sector. The commodities mined in the region include sandstone, salt, limestone, diamonds and phosphate.

[9] West Coast District Fact Sheet, 2012, Wesgro

- Other key sectors are the services sector, tourism and construction sectors

The contribution of the 'agriculture, forestry and fishing' sector to the West Coast's GDP in 2010, was 15.4%.

There was a 0.4% contraction of this sector in the district between 2006 and 2010. The value that this sector contributed to the district's GDP declined between 2006 and 2010 from R1,607-million in 2006 to R1,583-million in 2010.

The 'agriculture, forestry and fishing' sector also accounts for the largest percentage of employment in the district, with 27.9% of employed people working in this sector. The unemployment rate in the district is 15.5%.[10]

The West Coast District Municipality has outlined six major sectors that have investment potential and these are seen as continuing to have growth potential. These six sectors are:

1. Agriculture
2. Fishing
3. Tourism
4. Manufacturing
5. Mining
6. Renewable Energy

Designated harbours on the West Coast serving as marine access points and fishing locations alongside other non-designated harbours and Slipways such as Doringbaai, Elandsbaai and Paternoster, and a major port at Saldanha Bay.

[10] West Coast District Municipality IDP 2012-2016

3.2.2 Lamberts Bay

Lamberts Bay forms part of the Cederberg Local Municipality and falls – together with the town of Leipoldtville – under ward 5 of the municipality. Lamberts Bay is described in the 2010/2011 annual municipality report as '…*a coastal town with its reason for existence linked to the fishing industry and the harbour. The building of a processing factory for fishmeal, lobster packaging and potato chips led to sound growth that makes a substantial contribution to the town's economic base. The greatest asset of the town is its impressive coastline and unique Bird Island, which is a favourite tourist destination*.' (p.26). Lamberts Bay is 254 kilometres from Cape Town and has together with Leipoldtville a population of 6.203 people.

Figure 4: Lamberts Bay Harbour

a. Socio-economic trends

In terms of employment, the forestry and fishing sector provides with 39.2% the most employment in the Cederberg municipality, followed by social and personal services (13.2%), wholesale and retail trade (11.3%), manufacturing (7%) and construction (6.5%) (p.30).
From the 2010/2011 annual report of the Cederberg municipality, the following demographics have been extracted:

Municipality Demographics	2010/2011
The total municipal area population	39.326
Population in ward 5	6.203
Number of households in municipal area	6.098
Number of indigent households in municipal area	8.87
Income per capita (nominal terms)	R 3 232 (2001) to R 3 734 (2006)
Population race categories:	
– African	3.131
– Coloured	30.765
– Indian	26
– White	5.404

Table 4: Cederberg municipality demographics

b. Current harbour activities and facilities

The harbour of Lamberts Bay is situated at the north west side of Lamberts Bay, opposite the Bird Island Reserve.

Figure 5: Close-up Lamberts Bay Harbour

Lamberts Bay Harbour has been split in two different sections. Both parts of the harbour have been separated from each other by a fence and R5 is collected from visitors entering the harbour. The western part of the harbour has a focus on tourism and industry. When entering the harbour from that side, an arts & craft shop can be found at the corner, followed by Isabella's Restaurant & Coffee Shop, a popular tourist attraction. DAFF has its offices in the middle of the harbour and a large part of the remaining part of the harbour has been occupied by the Lamberts Bay Foods chip cutting plant. This former fish processing factory now produces potato products sourcing potatoes from all major growing areas in South Africa and selling products to wholesalers, retailers and fast food chains.
The eastern part of the harbour has a focus on boatbuilding, with a slipway and a repair haul.
Lamberts Bay Harbour currently has a harbour manager; however a functional harbour users committee does not seem to be in place.

c. High-level harbour infrastructure assessment[11]

The harbour was empty during the survey; one small fishing vessel entered harbour but had no catch on board.

- Jetty

Figure 6: View onto jetty

At the fishing jetty one vessel was moored, one was sunk at the jetty and two were stripped and in bad state.

Figure 8: Jetty

Figure 7: Sunken vessel

- Slipway

The boathaul out cradle on the slipway was being refurbished and the quality of the work was good.

[11] Based on brief site visits during May/June 2012

Figure 9: Cradle on slipway being refurbished

- Breakwaters

One breakwater, backing onto the beach was being re-amoured.

Figure 10: New mini dolloss being placed

However there was a problem of flow under the main breakwaters. The breakwaters have been re-armoured but the flow was not stopped, which indicated larger gaps under the caissons. At this stage there is no danger to the breakwater is it is well protected.

Figure 11: Blow through under main breakwater

- Wooden Jetty

There is a wooden jetty on the outer breakwater. This has deteriorated and it is considered it will become unsound shortly.

Figure 12: Wooden jetty

Figure 13: Lower section

- Diamond mining vessels

Three diamond mining vessels were anchored, and appeared un-used. The diamond mining jetty was empty and deserted.

- Summary

Lamberts Bay did not appear to be a fully functioning fishing harbour. It was in satisfactory condition, although the breakwater and the wooden jetty need to be kept under review.

d. Fishing rights, activities and value chain dynamics

Commercial fishing at Lamberts Bay effectively ceased in 2006 with the closure of the Oceana fishmeal plant and lobster processing facilities which employed in the region of 70-80 people. These premises were successfully converted into a potato processing plant which manufactures French fries for the food franchise and catering sectors. Fishing activity in Lamberts Bay is now restricted to very limited linefishing and lobster fishing under “interim relief” permits from bakkies.

The target linefish are very small quantities of “hottentot” and snoek when they are running sold locally at the quay, to local restaurants or in the community.

Lamberts Bay interim relief permits holders reported that their lobster allocations (80 per month, subsequently changed to 176kg/month) had made a big difference to their livelihoods. Lobster permit holders collectively hired as vessel from one of their group at a rate of R30/kg caught. Fraudulent lobster sales of part of their allocations by monitors who had copies of their permits was reported to be problem that was still to be resolved by DAFF.

Lobster caught by interim relief are sold live to factories at St Helena Bay (for R110/kg) and no processing or value adding occurs at Lamberts Bay. Lobster rights holders felt there were too many middle-men and that they were excluded from participation in the value chain beyond landing the fish, as they were only allowed to possesses four lobsters. Lobster (1500 pieces) for the Lamberts Bay kreef festival, which attracts 20,000 people, are purchased cooked and frozen from the same factories for around R300/kg.

Commercial fishing has ceased in Lamberts Bay and will not return due to resource shifts. The conversion of the fish factory into a potato French fries plant has been successful and the harbour is a tourism/ recreation attraction with Isabella's restaurant and the penguin colony being major draw cards. Fishing is now restricted to small scale fishing which although very small in terms of tonnage and value does make a significant difference to the livelihoods of local fishers.

A logical strategy is therefore to empower local fishers to capture more value from their lobster catch through local sales into the tourism sector, with the Kreef Festival presenting a major local market opportunity. Current DAFF permit requirements prohibit local sales in part due to the health risks of selling unprocessed lobster and the difficulty in monitoring informal sales. A technical assessment and engagement with DAFF would be required to evaluate whether local fishers could somehow process and sell their own lobster to the Kreef festival organisers and local restaurants. Alternatively, if they were empowered with a better business structure, they could have the lobsters processed for a processing fee instead of selling them out of hand.

It needs to be appreciated that as the fishers lack capital, they are usually provided with a "voorskot" by the buyer at the beginning of the season to purchase fuel, bait etc., and this then binds them to the buyer for the rest of the season. The fishers are thus forced into being price-takers with little leverage in the market. The Lamberts Bay interim relief holders did however report that they had a very good relationship with their buyer who treated them well.

e. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Aquaculture: Possibility of shore based abalone culture if suitable land can be allocated.	No primary fishing industry anymore
Cohesive local community receptive to projects	No fish packing & processing facilities
Local entrepreneurs	Current crayfish shipped to St Helena Bay and Elandsbaai
Seem to be functioning community structures and stakeholder dynamics	Harbour under-used
Good DPW maintenance of haul out facilities	Breakwater problem: the water is surging under the breakwater, this causes some currents in the harbour. It will be difficult and expensive to correct. The present activity by DPW/DAFF to pile more protection means that there is no danger to the breakwater but is not dealing with the problem.
Track record of backing new harbour uses – chip factory	Harbour management not orientated to serving tourist industry and recreational boating sector
Tourism attractions centred around harbour: Bird Island, restaurant and craft shop	254 km from Cape Town: seasonal and small volume tourism

Opportunities	Threats
Live holding or processing of crayfish in	Water shortage

factory Unlock unused land around the harbour Packaging facilities for potato plant Sea-water cooled wine cellar producing wine with local grapes High end tourism (e.g. floating restaurant / hotel) Community and hospitality activities and events: Fish & chips festival, occasional market, film screenings, etc.	Lack of cooperation between harbour and other players (e.g. Cape Nature)

Table 5: SWOT-analysis Lamberts Bay

f. Examples of events in the harbour and vicinity

Date	Event
Lamberts Bay Crayfish & Cultural Festival	March

Table 6: Events Lamberts Bay

3.2.3 St Helena Bay

St Helena Bay forms part of the Saldanha Bay Municipality and falls – together with Sandy Point, Stompneusbaai and Laingeville - under ward 6 of the municipality. St Helena Bay is described in Cape West Coast Peninsula tourist brochure as '*Thirty one kilometres of beautiful coastline with 18 bays winding their way around the central peninsula of Shelley Point. With three working harbours, stunning beaches and a wealth of seabird- and wildlife together with glorious carpets of seasonal flowers, this is a truly captivating area to visit and explore throughout the year.*' St Helena Bay is 149 kilometres from Cape Town

Figure 14: St Helena Bay Harbour

a. Socio-economic trends

Please refer to Saldanha Bay section.

b. Current harbour activities and facilities

St Helena Bay Harbour is situated North West of St Helena Bay and East of Sandy Point. The main focus on the harbour is fishing which is clear from the lack of tourist facilities in the harbour. Most of the harbour area is being occupied by commercial fishery companies, seafood processors and associated service industry. There is a double slipway with limited capacity that becomes congested with long ski boat queues at the end of a busy snoek fishing day. Boat repair facilities can be found in the northern part of the harbour. The harbour can be entered for a R5 entrance fee.

It appears that there is no effective harbour management in place. There seems to be no effective harbour users committee or functional harbour users forum that addresses slipway maintenance and general harbour management issues or the needs of the fishers. Furthermore, harbour buildings seem to be unoccupied and there is an opaque policy or cost recovery on harbour services.

Figure 15: Close-up St Helena Bay Harbour

c. High-level harbour infrastructure assessment[12]

The harbour is a major base for the small pelagic fishing industry with three factories processing tinned sardines and fishmeal. The harbour was very busy during the survey. All the activity was based around the ski-boats which were offloading good snoek catches on the jetty.

- Jetty

[12] Based on brief site visits during May/June 2012

Figure 16: Jetty offloading

- Slipping of skiboats

The boats then went out on the slipway to a grassy areas for cleaning, and then to a garage outside for re-fuelling.

Figure 18: Coming up the slipway

Figure 17: Cleaning of the boats

Figure 19: Refuelling

- Larger fishing vessels

There were a number of larger small pelagic fishing vessels present in harbour.

Figure 20: Small pelagic fishing boats at quay

- Slipway

The slipway quay was in good condition.

The slipway and the cradle were under refurbishment. The standard of workmanship was good. One vessel was being broken up.

Figure 21: Slipway and cradle

- Breakwater

The breakwaters appeared to be in good condition.

Figure 22: Outer breakwater

- Summary

St Helena Bay appeared to be a well- functioning and bustling harbour for both the small pelagic industry and the ski-boat fraternity mainly targeting snoek and rock lobster.

The facilities for the larger vessels were in good condition, but those for the ski-boats need to be improved.

d. Fishing rights, activities and dynamics

St Helena Bay is an active commercial fishing port, processing the largest volume of small pelagic fish (200,000-300,000t/annum) in the country. The harbour also has a very active small boat slipway that is probably the most heavily utilised snoek fishing launch site with landings of up 2000t/annum.

The harbour supports four pelagic fish factories (West Point, Benguela Holdings, Oranje Vis and St Helena Bay Fishing) which do both pilchard canning and fishmeal processing. The pilchard canning factories are reportedly operating well below capacity due to lower pilchard landings, but the fishmeal plants have been operating at full capacity in 2011/12 due to an exceptionally good season for anchovy and redeye. In 2006, there were 41 vessels over 10 long active at St Helena harbour, however this number is reportedly lower now. Twenty-eight vessels of 0-10m were active at St Helena Harbour in 2006; however this excludes the highly mobile snoek fleet which can launch dozens of vessels anywhere on the West coast. The active crew capacity of vessels at St Helena Bay was estimated to be around 500 in 2005/6, though this number will now be smaller with the drop on vessels numbers. One of the reasons for the drop is vessel numbers is a phase of consolidation following the long term rights allocation process in 2005/6. Rights applicants were required to have vessel capacity to apply, which stimulated many to invest in vessels even if this was not economically viable as a stand-alone enterprise.

Benguela Holdings Jaloers Bay processing plant also processes aquacultured mussels from Saldanha Bay into mussel meats and half shell mussels. Horse mackerel is also caught from vessels based in St Helena Bay but currently processed in Cape Town. Benguela Holdings has established an abalone farm which is located on industrial land next to the fish factories.

The St Helena small boat slipway is well organised and is wide enough to launch 2 boats at a time. It is mainly used by snoek fishing lineboats which are towed from various locations in the region to St Helena when the snoek run is close by. While the slipway is functional, better facilities for parking and washing vessels and for flecking fish would enhance the facility. The latter were reportedly under construction at the time of the harbour was visited by the consultants.

The small pelagic factories operate in a mature and well established context of harbour and associated service industry. The primary products, fishmeal and tinned fish, can readily be transported by the well-established road infrastructure to buyers in Cape Town and further afield.

Local representatives of small scale fishers who had "interim relief" linefish and lobster permits felt that if they could have premises or and fish cleaning and holding facilities they would be able to actively market their fish (as opposed to selling to fish buyers at the quay), and that a retail outlet might be viable. The small scale fishers were in the process of organising themselves into a cooperative with the assistance of a DTI subsidy.

The vibrant small vessel quay is a potential tourist draw card; however, constraints were that there are no restaurant or tourist facilities in the harbour and the fishing activity only occurs when the snoek are running. Despite a drop in pelagic fish vessels and activity, St Helena will remain the largest pelagic fish processing harbour. An under-capacity to process fishmeal in the pelagic sector and available industrial sites in St Helena harbour opens the way for possible additional investment in fishmeal plant. Sea Harvest is reportedly in the process of developing a fishmeal plant for demersal fish offal.

While St. Helena Bay offers relatively sheltered water which is required for aquaculture, it is prone to red ride which renders shell fish farming non-viable.

e. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Major pelagic fishery industrial harbour	One fee (R50) for all types of boats. Small scale fishers believe smaller fishing boasts should pay less.
Active ski boat fishing harbour for Snoek run	Wooded landing quay where the small ski boats off load their catch needs maintenance
Harbour generally in good condition	Inadequate ski boat parking facilities: boats queue up at the slip and then move away to an open field after which the boats go outside the harbour to fill up fuel at the local garage.
The haul out facility and fishing boat quays are in good condition	Several unoccupied buildings in the harbour
Functional small boat slipway able to launch two boats at the same time	Ineffective harbour management
	Ineffective policy or cost recovery on services
	No functional forum that addresses the needs of the fishers (such as slipway maintenance)

Opportunities	Threats
Local small-scale fishing, shore-based facilities to salt and dry Snoek, process and store lobster, and sell fish to tourists	
Revitalisation of unoccupied or underutilized buildings in the harbour	

Table 7: SWOT-analysis St Helena Bay

f. Examples of events in the harbour and vicinity

Date	Event
"Christmas In July" Market	July
St Helena Bay Arts, Crafts & Food Market	April
Trek to Paternoster	July
Vasco Da Gama Festival	July

Table 8: Events - St Helena Bay

3.2.4 Saldanha Bay

Figure 23: Saldanha Bay Harbour

Saldanha Bay forms part of the Saldanha Bay Municipality and falls – together with Blouwater Bay and White City - under ward 6 of the municipality. Saldanha Bay is described in Cape West Coast Peninsula tourist brochure as '*Set on the north side of a massive bay, the town of Saldanha is a holiday hotspot for watersports lovers to sail and water-ski all summer. The big bay is a favoured venue for regattas and sailors to test their skills, and provides a scenic backdrop to the town. Whilst Saldanha is a busy working town, holiday makers come to relax and unwind, enjoy fresh seafood at the various seafood restaurants at the water's edge, and to soak up the surrounding natural scenery*.' Saldanha Bay is 140 kilometres from Cape Town.

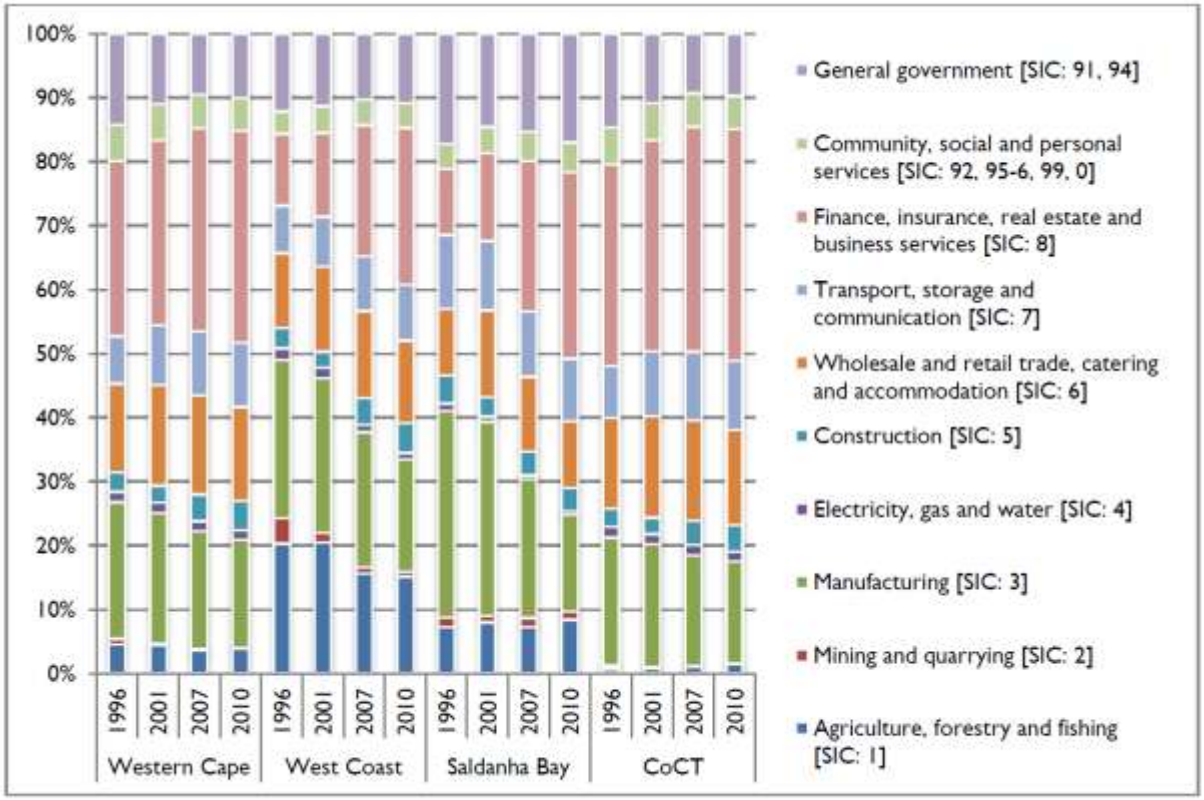
a. Socio-economic trends

Vorster and Heinecken (2009) reported an average household monthly income of R1 346, with 34% of employed people in working in either fishing or aquaculture. Unemployment was reported to be 50-60% far in excess of the municipal average of 25%.

The local municipal IDP sets out a range of economic development targets, including doubling the current gross Regional Product by 2014, creating 50% more jobs in the local economy by 2014, and various training and skills targets. The planned IDZ is a key economic intervention in the area. Key economic initiatives include:

- Creating an oil and gas service and supply hub in Saldanha Bay
- Developing the back of port industrial corridor
- Developing the Saldanha port as a multi-product port facility
- Developing an Iconic tourism facility on the Saldanha bay port
- Investing in human resource develop through partnerships with the private sector for skills
- Transfer

The IDZ feasibility indicates that "Saldanha Bay is a critical resource for the sustainable growth and development of the Western Cape. The deep-water port and surrounding infrastructure have already encouraged the development of major industries that contribute positively to local employment and regional and national GDP. The size of the Saldanha Bay economy was estimated at R4.6billion in 2010. This makes up around 31% of the West Coast Districts total GDP of R14.8 billion for that year and 1.3% of the Western Cape economy", with a sectoral breakdown as follows [13]



Source: Quantec Database, Standardised Regional Data, 2011

Figure 24: Saldanha Bay sectoral contributions

[13] Wesgro (2011) Saldanha Bay IDZ Feasibility Study Revision 1, p. 60

b. Current harbour activities and facilities

The Saldanha Bay Harbour is situated south of Saldanha and covers the entire southwest part of the bay. The bay area has an industrial look, mainly due to the Port with the only dedicated iron ore export facility in South Africa. The Port is positioned in the eastern part of bay, operates around the clock, and has a loading capacity of around 8,000 tons an hour, with peaks of up to 10,000 tons an hour.[14]

The government owned fishing harbour occupies two areas within the industrial waterfront comprises of quays and harbour facilities that are either Portnet or privately owned. The fishing harbour comprises of;

- A northern section for larger vessels comprising of quays and a maintenance slip adjacent to Sea Harvest's private quays and processing facility; and
- A southern section with a slipway for launching small fishing. There was no shore based activity opposite the slip as the Pedro's Fishmarket and Restaurant used to attract many tourists had been closed.

Figure 25: Close-up Saldanha Bay Harbour North

[14] http://www.kumba.co.za/ob_logistics.php

The northern part of the Saldanha Bay Harbour is a regional hub of fishing activity, mainly due to the presence of the Sea Harvest processing plant. The plant is the largest employer in the Saldanha Bay, responsible for between 4,000 and 5,000 direct and indirect jobs.[15] The government owned fishing harbour facilities consist of two jetties, the first being poorly utilised and named the 'scrap jetty' by local fishermen due to the sunken and dilapidated ships still moored to the jetty. The second jetty had several operational ships moored to it and appears to be in good condition.

Moving south from the harbour some tourism (the Slipway Restaurant) and recreational facilities (the yacht club) were available along the waterfront of the harbour and a functional boat repair facility was in operation.

Figure 26: Close-up Saldanha Bay Harbour South

Due to a lack of prior harbour management, Sea Harvest - with its fish processing plants in the harbour and twelve operational fishing trawlers of which a few are moored at its private quay - took responsibility for the management of the proclaimed fishing harbour. The harbour is however lacking full time management, resulting in sunken and un-salvaged ships at the 'scrap jetty', ineffective management of boat repair and long lead times for harbour infrastructure maintenance on the repair jetty.

[15] http://www.seaharvest.co.za/corporate/social-responsibility

c. High-level harbour infrastructure assessment[16]

The fishing facilities in Saldanha Bay harbour are split, being located in between the NPA facilities, Navy Base and commercial repair establishments. Little activity was evident at the time of the visit to the fishing harbour facilities (May, 2012).

- Main quay


Figure 27: Main quay

The main quay was in good condition. Electricity was provided and was working

- Smaller quays

Figure 28: Lower section of quay showing sign of possible exfoliation of supports

- Slipway and cradles

[16] Based on brief site visits during May/June 2012

The cradles and rails had been refurbished and were in fair condition. Some maintenance was still necessary on the wheels and side slipping apparatus.

Figure 29: Slipways and cradles

- Summary

Saldanha Bay facilities were in satisfactory condition.

The could be a case for placing the fishing harbour facilities under the NPA control as they have the infrastructure and capacity for managing overall harbour situation in Saldanha Bay.

d. Fishing rights, activities and dynamics

Saldanha Bay is a major harbour for demersal fish processing. Pelagic fish processing has been suspended for some years although plans are underway to reopen a pelagic factory. Some lobster is processed in Saldanha bay. The number of fishing vessels in the non-demersal sub-sectors (pelagic, tuna pole, hake longline) has decreased dramatically since 2006 as the enterprises of many new entrants who received rights were not viable. In 2006, 24 small fishing vessels (<10m) and 61 large (>10m) were active in Saldanha bay employing some 800-1000 crew.

Saldanha Bay is home to Sea Harvest Corporation - one of South Africa' two biggest demersal trawl companies, with a hake TAC of 32,000t in 2011. Sea Harvest is a vertically integrated company operating a demersal modern trawl fleet and processing factory. The socio-economic impact of Sea Harvests operation in Saldanha is significant, according to the company website: "Sea Harvest is the single largest employer in the Saldanha Bay and West Coast District, responsible for between 4,000 and 5,000 direct and indirect jobs. The company accounts for an estimated 15% of all employment in the Saldanha Bay Municipality. These jobs represent more than 15% of all household income in the greater West Coast district and nearly 30% in the town of Saldanha." (Sea Harvest Corporation website: www.seaharvest.co.za). Sea Harvest possesses its own quays for offloading and mooring vessels and makes only limited use of the government fishing jetties.

The Southern Seas pelagic fish cannery which closed some years ago is reportedly in the process of re-opening with an EIA currently underway.

A small group of 26 Saldanha based small-scale fishers received interim fishing rights and operate from the DAFF small boat slipway. Members of the group own 5 vessels (three of which are operational) which are used to catch their lobster allocation, snoek and other local linefish.

Aquaculture is major marine activity in Saldanha Bay with three companies growing mussels (approx. 600t/annum) and oysters (approx. 150t/annum). Employment mussel and oyster production is currently about 56 people. Permission has recently been granted for 15 Ha of water between Markus Island and the Navy Base for pilot cage culture of salmon. Portnet has recently granted an additional 70Ha of water in the Outer Bay (to the South of the iron ore jetty) for mussel/oyster culture.

Through preferential procurement about 200 West Coast businesses provide goods and services to Sea Harvest. For many of these suppliers, Sea Harvest purchases represent more than 60% of their annual turnover. Sea Harvest's annual contribution to the regional economy is estimated at R277 million, representing 10% of the GDP of the Saldanha Bay region. Sea Harvest specialises in value added products which are distributed to diverse markets around the world.

Mussels are processed into value added products at plants in Vredenburg and St Helena. Sea Harvest and other companies then purchase these mussels for inclusion in frozen "seafood mixes". Frozen mussel meats and half-shell mussels are sold into the catering trade.

The demersal and pelagic fishing and processing industries are well established at Saldanha Bay and can be considered to be globally competitive companies. As they operate vertically integrated operations and own their own warfare, there is little they require to enhance their competitiveness.

The numbers of pelagic, tuna pole and long-line vessels based in Saldanha Bay have decreased dramatically with post- rights allocation fleet consolidation, resource shifts to the East, closure of processing facilities, and the decline of fishing harbour facilities. Out of an estimated 30 non-demersal vessels in Saldanha Bay in 2006, only 1 longliner and two tuna pole vessels were reported to be active in 2012.

The group of small scale fishers felt that their viability could be enhanced if they could be provided with a shore based premises and somehow linked into opportunities to capture greater value from their fish. Manager of Saldanha Tourism, Dave Osborn, felt there were entrepreneurial opportunities for local fishers through the local festivals, such as the 'Langebaan Festival" and a possible revival of the Saldanha "Oogsfees".

e. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Functional industrial fishing harbour, home to Sea Harvest' demersal fleet and processing plant	Although large aquaculture area, not ideally located in the middle of the bay
One of few sheltered sites for marine aquaculture in South Africa	Ineffective harbour management; Sea Harvest is currently managing the harbour
Fishing industry and service sector a major local employer	Community survey in 2007: low education and inadequate training for community
Harbour generally in good condition	Two small slipways need maintenance

Haul out facilities well-maintained by DPW Quays in the two fishing harbour areas in good condition Tourism potential: High volume of "business" visitors to Saldanha; Hoedjies Koppie: traditional community site with museum	Sunken ships at 'scrap jetty' in harbour Infrastructure for boat repair ineffectively managed Long lead times of harbour infrastructure maintenance: four years to repair jetty (repairs currently being undertaken) Limited appeal to tourists due to 'industrial image' Waterfront area in private hands complicates spatial planning. No tourist or fish processing activity at small craft DAFF slipway; a primary harbour location

Opportunities	**Threats**
Reinvestment into pelagic fish processing Shore based facilities to support growing aquaculture (mussel, oyster and fish) operations Linkage of small scale fishing to tourism Installation of shore based facilities for small scale fishers at DAFF slipway to promote enterprise development such as fish holding, processing and retail infrastructure. Improve management and operation of large vessel repair facilities. Align fees with Cape Town to incentivise local vessel maintenance. Upgrade of Hoedjies Koppie area with e.g. amphitheatre, walking tours and accommodation Revival of the annual Oesfees	Iron ore jetty and doubling capacity of plant threatens aquaculture in the bay Water pollution in, *inter alia,* Pepper Bay Locals believe bureaucracy slows down development. 15 EIAs outstanding for Saldanha Bay Harbour fees are 13 times as high as the Namibian port fees for commercial vessels Langebaan capturing main tourist stream

Table 9: SWOT-analysis Saldanha Bay

f. Examples of events in the harbour and vicinity

Date	Event
Fireworks Festival	November
West Coast Half Marathon	August
Saldanha Splash	March

Table 10: Events - Saldanha Bay

3.2.5 Laaiplek

Laaiplek and adjacent Velddrif are part of the Bergrivier Municipality (together with Aurora, Dwarskersbos, Eendekuil, Goedverwacht, Piketberg, Porterville, Redelinghuys). The municipality had a population of 44.739 people in 2007 and Laaiplek is 146 kilometres from Cape Town.

Figure 30: Laaiplek Harbour

a. Socio-economic trends

Demographics	2001	2007
Population	46.331	44.739
Unemployment	9.2%	10.6%
GVA	R968 m	R1.2 billion (2009)
GVA/Capita	R20.893,14	R26.822,24
GVA-R growth rate (Annual Average%) 2001 – 2009	-	2.5%
Largest Sector Contribution to GVA-R:		
– Agriculture	28.1%	27.4%
– Finance	13.4%	19.7%
– Manufacturing	23.2%	17.8%
– Community Services	13.9%	14.8%
– Trade	13.9%	11.5%
Population race categories:		
– African	5.0%	6.0%
– Coloured	75.5%	75.7%
– Indian	0.2%	0.0%
– White	19.3%	18.3%
Literacy rate (%) 14 years and older	-	70.5%

Table 11: Demographics of the Bergrivier municipality

b. Current harbour activities and facilities

The Laaiplek Harbour is situated at the north-western part of Laaiplek at the mouth of the Berg River. The harbour is relatively small, but has a large, dilapidated wooden quay alongside the water. The Eigelaar family businesses have a strong foothold in the harbour and own several

plots of land in the harbour which are rented to light industry such as a car washing company, and several tourist facilities such as *Keffie Oppie Hawe* and a take away restaurant. The Eigelaar family's *Eigevis*, fishing company has its offices in the harbour and moors two pelagic vessels on the adjacent fishing quay. The harbour has one privately owned slipway and one ship repair facility.

To the east of the government fishing quay, is situated the large Foodcorp fish factory, producing canned pilchards and fish meal. The factory employing 600 people and has several private jetties. Access by visitors to the western part of the harbour and river mouth has been restricted by a recently erected DAFF fence.

Figure 31: Close-up Laaiplek Harbour

Upstream, three small harbours can be found: Port Owen, Pelican Harbour and Bokkom Laan. Port Owen is an artificial harbour developed during the second half of the previous century as a luxury life-style residential area with a sailing-yacht marina. A network of canals connects the marina with the river and the sea. Overseas visitors can enter the river from the sea and dock at the marina.

Pelican Harbour is a community project offering various tourism facilities such as a restaurant, cafes and a bed & breakfast.

Bokkom Laan is the base from with the traditional small-scale "net fishery" operates and houses several fishing jetties and processing facilities producing bokkoms. Each factory has its own small jetty on the river opposite the processing facility. The traditional gillnetting of mullet in the river estuary has been prohibited and the fishermen are now required to set their nets in the open sea just off Laaiplek. Bokkom Laan with its pretty estuarine location and traditional

fishing facilities has a particular charm and has several restaurants and cafes which draw many tourists

The Cerebos Salt factory is also situated near Laaiplek. It is the largest factory in South Africa where salt is being extracted from sea water. More than 12 000 tons of salt are produced at this facility annually.

c. High-level harbour infrastructure assessment[17]

Laaiplek harbour consists of a wooden quay behind breakwaters protecting a wet land and a ribbon development of private quays along the south river bank.

- Quay

Figure 32: Fishing vessels along jetty

Figure 33: Wooden jetty

Figure 34: Underside of wooden jetty shows heavy encrustation and some rot

- Breakwaters

The breakwaters are in good condition.

[17] Based on brief site visits during May/June 2012

Figure 35: Breakwaters

- Small craft slip

There is a small craft slip inside the DAFF office compound.

Figure 36: Small craft slipway

- Crane

There is a shear-legs crane at the end of the jetty. It is under maintenance.
Note the sinking vessel behind it.

Figure 37: Shear-legs crane

- Commercial Slipway

There is a privately owned slipway next to the quay. It was not seen to be in good condition and the surrounding jetties are weak.

Figure 38: Commercial slip

- Summary

The government jetty and crane are in poor condition and require upgrading.

The quay at Laaiplek seems is underutilised serving as a mooring for pelagic vessels from the Marine Products factory and other inactive vessels.

d. Fishing rights, activities and dynamics

The main fishing enterprise in Laaiplek is the Marine Products pelagic fish canning and fishmeal facility which dates back to the 1950s. The pioneering Eigelaar Brothers processing facilities closed some years ago although they retain their wharf side premises and moor two pelagic vessels on the government fishing harbour Quay. Laaiplek is also home to a unique small vessel net fishery which uses gill nets to catch mullet which are processed into “harders”. The Marine Products pelagic factory processes 10,000-15,000t of sardines for canning and 20,000-45,000t of anchovy and redeye into fishmeal. It is the most important employer in the town with 490 seasonal workers, 80 permanent employees and 60 vessel crew. The collective wage bill is of the order of R50million/per annum

The net-fishery is a true traditional, small scale fishery with shore based facilities a few kilometres up the Berg River estuary at “Bokkom Laan”. The fishers catch and process close a 1 million harders a year (DAFF, 2012) .This authentic setting of jetties, wetland and traditional building has become a tourist draw card for Velddrif.

The strength of the Marine Products factory is that it is old and well established with well-known market brands. The Berg River mouth presents all weather access to the sea. As the factory is operating below capacity due to under catching of the anchovy/redeye TAC for many years, and because profit margins are small on fishmeal, the company has delayed reinvestment in modern fishmeal plant. Objections from town residents to the fishmeal smell and siltation of the river further constrain the company’s operations. The government jetty is poorly maintained and the Eigelaar and other fish processing facilities have closed. The harbour forum was reported to have collapsed. Realistically, unless the fishing harbour infrastructure is upgraded and the river dredged there is a good case for relocating processing operations to the modern

and well serviced St Helena fishing harbour which would have a significant socio-economic impact on the town.
Laaiplek does possess a slipway but it is considered dangerous due to its steepness and difficult to access as it is within the controlled DAFF compliance precinct. Thus skiboats prefer to launch from St Helena harbour. The catching costs of netfishers had been substantially increased as fishing in the estuary had been prohibited by DEAT and they were now obligated to travel into the bay to set their nets.

e. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Employment (income) contribution (600 workers in Foodcorp fish factory)	High unemployment in fishing community
Harbour land in private hands (Eigelaar family and others) –scope for private investment	Community is not involved in the harbour
High volume of accommodation around harbour	Wooden quay needs maintenance
The Berg River Estuary: high variety of birds and fish species: famous for bird watching (several bird watching clubs)	No launch facilities for bigger boats: relocation to St Helena
Fishery museum and arts & craft shops around the harbour	Private land ownership along wharf makes holistic planning difficult
	Fragmented tourism facilities (Pelican Harbour, Bokkom and Laaiplek Harbour)
	Few tourist facilities in harbour (e.g. picnic spots) and tourist access to Berg River mouth cut off by DAFF fence. Limited beachfront accommodation.

Opportunities	Threats
Dredging of harbour and estuary	High levels of sand in harbour: depth of harbour is very much dependent of tide. Berg River dam prevents the water flowing in the estuary
Linkage of fishing harbour and estuary to integrated tourism route	Large St Helena Bay harbour less than 15km from Laaiplek
Waterfront area at current fishing boat quay with tourist and community use potential for restaurants, shops etc. (fishing activities could continue at the private facilities)	Water pollution
Inclusion of Bokkom Harbour, Pelican Harbour and Laaiplek Harbour in tourism trips	Making the same mistakes as Pelican Harbour development
Water Carnival during final two days of the Berg River Marathon (finish in Laaiplek) linked to festival in the harbour	

Table 12: SWOT-analysis Laaiplek

f. Examples of events in the harbour

Date	Event
Annual Fishermen Church Service	January

Table 13: Events - Laaiplek

3.3 Metropolitan harbours

3.3.1 City context

The City of Cape Town is the largest and most significant population and economic region in the Western Cape, with the population at around 3.8 million people. The recent census results have shown an increase in urban migration and the population of City of Cape Town is likely to grow to 4 million by 2016[18].

The City of Cape Town is the second largest contributor to the South African economy, of all major metropolitan areas (after the City of Johannesburg). It contributed 10.9% of South Africa's GDP in 2009[19].

The City of Cape Town contributes 74% of the regional (Western Cape) economy, The financial and business services industry is the largest sector in the city's economy. The other most significant sector contributors to the City's economy are the manufacturing; wholesale and retail trade, catering and accommodation; and transport, storage and communication sectors[20].

The 'agriculture, forestry and fishing' sector only contributes 1.5% to the City's economy, The sector has, however, grown by 12.17% between 2006 and 2010[21]. The number of people employed in the

Cape Town's unemployment rate was 25.8% in 2010, having risen from 20.9% in 2008[22]. There are significant disparities in income between the wealthiest and poorest members of the population. The Gini coefficient (which measures the level of income equality between different sections of the population) of Cape Town is quite high at 0.58 in 2010. This is, however, better than the other major metros in South Africa, including Johannesburg and eThekwini (Durban), which had Gini coefficients of 0,62 and higher.

The City of Cape Town's IDP (2012-17) outlines five key pillars to its development plans, namely:

1. The opportunity city – aiming to create opportunities for business, investment and employment
2. The safe city – aiming to reduce crime and make the city more attractive to live in
3. The caring city – aiming to provide a city which provides for all citizens and seeks to particularly assist the poor
4. The inclusive city – aiming to provide for all race and income groups and helping to make the city more diverse and proud of its diverse heritage
5. The well-run city – aiming to improve governance and implementation in the city

Within the context of these key pillars, the City of Cape Town has also highlighted a number of important sectors it seeks to promote. The City has highlighted particular areas, where there is existing expertise, which it seeks to build on, namely:

- Financial services
- Higher education

[18] City of Cape Town,2010, Discussion paper - DEMOGRAPHICS SCENARIO
[19] City of Cape Town IDP 2012-17
[20] Wesgro, 2012, City of Cape Town - District Fact Sheet
[21] Wesgro, 2012, City of Cape Town - District Fact Sheet
[22] City of Cape Town IDP 2012-17

- Medical research
- Niche engineering
- Design, advertising, film & technology
- Business Process Outsourcing
- Maritime sector
- Green industry
- Energy
- Tourism
- Agribusiness

Within the City the designated fishing harbours have a key role to play in marine access alongside ports, other non-designated harbours (such as Simonstown), slipways and ramps (including very active sites such as Millers Point).

3.3.2 Hout Bay

Hout Bay falls under Subcouncil 16 of the Cape Town Metropolitan Municipality. Hout Bay harbour is the closest proclaimed fishing harbour to Cape Town at only 22 kilometres from the city. Hout Bay lies in a bay between Chapman's Peak and Mount Sentinel. The town is well known for its crayfish industry, the Bay Harbour Market and the World of Birds. Furthermore, Duiker Island attracts tourists to view the colony of seals. According to the Cape Town Tourism brochure '*The little fishing village of Hout Bay has it all, from great mountains, a long white sandy beach, a busy harbour with daily catches of fresh fish, and a host of activities & adventures to enthral your days*.'

Figure 39: Hout Bay Harbour

The Hout Bay area is also characterised by extreme inequality, and competition for opportunities between communities within the area, notably between Hangberg and Imizamo Yethu communities.

a. Current harbour activities and facilities

Hout Bay Harbour is a large harbour with industrial fishing and processing facilities, traditional small-scale fishing vessels, a yacht basin, recreational motor fishing boats and skiboat slipways. Due to its proximity to Cape Town, the harbour is being visited by many day tourists arriving in the Red Hop On – Hop Off bus, resulting in several tourist facilities in the centre of the harbour. When entering the harbour, a stretch of arts & craft shops can be found. Behind the arts & crafts shops, numerous tour operators' boats are moored to bring tourists from the harbour to the seal occupied Duiker Island. In the northern part of the harbour, Mariner's Wharf can be found, a facility housing restaurants, shops and markets. Furthermore, the Hout Bay Yacht Club occupies a large clubhouse and owns one of the jetties. Next to the yacht club, there are several commercial fishing companies.

In the central part of the harbour, undeveloped land is being used as a car park and a small slipway can be found. In the southern part of the harbour, the Oceana Group fish meal factory occupies a large part of the harbour. Furthermore, a ship repair facility provides ship repair. Just outside the harbour in the south, the Bay Harbour Market draws many people on Friday nights, Saturdays and Sundays when the market's doors are open for the public. The restaurant Fish on the Rocks is open 365 days a year.

Figure 40: Close-up Hout Bay Harbour

Hout Bay Harbour does not have an effective harbour management in place. There seems to be no existing harbour manager, nor an effective harbour users committee.

b. High-level harbour infrastructure assessment[23]

When surveyed, Hout Bay gave the impression of being a harbour suffering from lack of planned management, governance and maintenance. It is a mix of yachting harbour, tourist attraction and fishing facilities.

[23] Based on brief site visits during May/June 2012

The fishing facilities were in very poor condition. A number of vessels were sunk at the jetties. The boats at the quays did not seem to be active. The slipway was not in good condition and boats on it were on long rebuild cycles.

The breakwaters were in fair condition, but do not cover the harbour from a NE wind which sets up a wave in the harbour.

Many of the services (water, power etc) have been vandalised. Security was reported to be a significant problem

- Tourist activities

A number of tourist boats take passengers, many from tourist busses, to Seal Island. There is an adjacent curios sales area. The activity seems to be in the mornings only except during peak holiday periods.

The quay is in good condition.

- Yacht Clubs

There are two recreational boat clubs, Hout Yacht Bay (mainly sailing) and Atlantic (mainly boat fishing). Both have floating moorings which are affected by the wave generated in the harbour. The jetties are not in good condition are in constant need or repair.

Figure 42: Hout Bay YC boats on moorings

Figure 41: Atlantic Boat Club with floating moorings

- Fishing Jetties

There are three jetties with many vessels that appear inactive. During the survey only one boat was seen to be moving. The jetty services are generally not working having been vandalised. Theft and vandalism off moored vessels was reported to be a major problem.

The quay was in serviceable condition, but congested from vehicles.

Figure 43: Fishing boat middle quay

- Slipway and cradle

There were sunken vessels on the repair quay.

The quay surface had been opened up to show the re-bar which showed corrosion.

The slipways were being refurbished.

Figure 44: Sunk boats at the repair quay

Figure 45: Repair quay surface

Figure 46: Boats on cradles on slipway

- Breakwater

The breakwaters were in fair condition, although the armouring was untidy. This is worse on the north breakwater. It is understood that the breakwater is insufficient to counter wave action under some wind conditions.

Figure 47: South Breakwater

- Commercial activities

A yacht repair and storage yard and a boat-yard are in the harbour area. There is space for much more commercial activities.

Figure 48: Boat yard, repair and storage yard

- Summary

Hout Bay has the challenge of mixed use with different requirements. It is very run down and does not appear to be well managed to keep the facilities in good condition. The harbour needs to be cleared of the sunken boats and the services up graded. Security appears to be necessary to prevent further deterioration.

c. Fishing rights, activities and dynamics

Hout Bay remains a major fishing port processing some 64,000t of pelagic fish, 2000t linefish and 400t rock lobster with landings worth approximately R127 million in 2006 (DEAT 2008a). In 2006 Hout Bay was home to 56 active large fishing vessels (>10m) and 6 small ones (<10m) (DEAT, 2008) with 800-900 active crew. Although current data are not available, the numbers of both vessels and crew have subsequently declined as a result of post- long term rights consolidation, decline in rock lobster and linefish catches, and some fishing company closures in Hout Bay (Witte, 2011). Hout Bay is also the main base from which South Africa's relatively new tuna pole fleet operates.

In the small scale fishery sector in 2011, there are seven traditional linefish boats employing 45 crew; the near shore rock lobster fishery had five rights holders employing 15 people; and two individuals possessed abalone rights (Witte, 2011). In the tuna fishery there are 68 boats based in Hout Bay employing approximately 800 people. About half of these crew are foreign (Namibian, Angolan), 30% are "coloured" and the balance black South African, mainly seasonal Zulu migrants (Witte, 2011). Approximately 50 offshore West Coast Rock Lobster boats are based in Hout Bay employing 4-6 crew each.

Oceana Brands, one of the biggest fish companies in South Africa, have about four purse seine vessels which operate intermittingly from Hout Bay.

There are 105 interim relief right holders in Hout Bay which allows fishers' access to 80 WCRL per month for 5 months, 60 nomadic fish species and 30 bank fish species (Witte, 2011).

Hout Bay is an important fish processing and seafood retail harbour employing 440 people in 2010. 45% of employees are reported to be casual or seasonal. Employment has declined over the last 15 years, as during the late 1990's a number of fish factories closed down or relocated from Hout Bay. More recent closures were Sea Harvest (2009), and Blue Fin Processors (2010) with each factory employing approximately 50 people (Witte, 2011).

Fishers from the local communities (Hangberg and Imizamo Yethu) who were interviewed complained how they were defrauded during the rights allocation process whereby their names an ID numbers where used when applying for rights on their behalf. Others who joined community initiated fishing companies were either defrauded or sold their rights in desperation for cash at well below market prices.

Recreational fishing charters are a popular activity based in Hout Bay, with a day charter on a luxury tuna boat reportedly costing in the region of R18,000.

d. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
High activity mixed use harbour: fishing (pelagic, lobster, Tuna, linefish), tourism and yachting & recreational Tuna/ line fishing boats	Slipway and repair quay are in poor condition and are not being well managed
Fish processing, boat repair	Harbour condition is deteriorating
Large amount of available space	Lack of quay space: old and sunken vessels blocking primary jetties and repair quay
Active Hout Bay Yacht Club	Breakwater in 'Dead Man's Gulch' needs maintenance
Strong base of tourism activity, proximity to Cape Town: within Cape Town metro, close to Constantia wine farms and on route to Cape Point. Red City Sightseeing Bus brings high volume of tourists visiting harbour for Seal Island tours, Bay Harbour Market and Hout Bay Craft Market.	Ineffective security: no fencing, harbour facilities (pipes, electrics, etc) and boats at jetties and in at repair quay are being vandalised
	Ineffective harbour co-ordination and/or harbour management
	Inconsistent checks on people entering the harbour
	Local community excluded from opportunities
	Craft shops mostly white/foreigner owned; limited empowerment of local community
	Limited tourism spin-off: tourist groups arriving in buses only stay in the harbour for a short while
	Too many tour guides and arts & craft stalls in the harbour

Opportunities	Threats
Yacht and boat building if security situation can be sorted out	Politically influenced harbour
Indoor boat building facilities and/or light industry in empty harbour buildings	Security situation deters investment.
International sailors: Royal Cape Yacht Club (Waterfront) is too expensive	Organised crime and Abalone poaching during the night
Guided harbour tour that includes Hangberg community	Eastern wind creates an in-harbour wave, breaking down moored boats
Traditional cultural focal centre and small-scale fishing value adding facilities (processing, retail) for traditional fishing community.	Dysfunctional harbour governance and management

Table 14: SWOT analysis Hout Bay

e. Examples of events in the harbour and vicinity

Event	Month
Hout Bay Sandcastle Competition	March
Cape Town Bike Show	March
Triple Challenge (fishing)	June
Snoek Derby	August
Heritage Day	September
Cannon Race (surf contest)	September
Hout Bay Green Faire	October
Hout Bay Harbour Festival	December
Hout Bay Craft Market	Every Sunday
Hout Bay Harbour Market	Every Friday, Saturday and Sunday
LION"s Craft market	Every Sunday
Hout Bay Yacht Club – Sailing Competition	Every Wednesday night from October-March

Table 15: Events - Hout Bay

3.3.3 Kalk Bay

Kalk Bay falls under Subcouncil 19 of the Cape Town Metropolitan Municipality. Kalk Bay is a small town wedged between the ocean and sharply rising mountainous heights. It has a unique setting in the way that the railway from the central business district of Cape Town to Simon's Town passes through the town, introducing Transnet as one of the landowners in or close to the Kalk Bay Harbour. Kalk Bay is close to Muizenberg beach and only 30 kilometers from Cape Town. The history of the area is closely tied to the fishing community, which has a proud history of successfully defying the apartheid Group Areas Act.

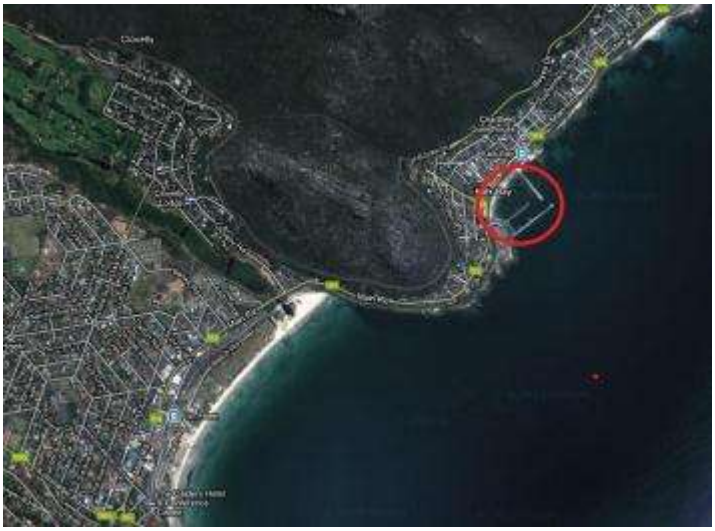


Figure 49: Kalk Bay Harbour

a. Current harbour activities and facilities

Kalk Bay Harbour is a small harbour at the southern part of Kalk Bay. The harbour has only one jetty at which several fishing boats were moored. In the centre of the harbour, vendors sell fresh fish at small stands. Besides the stands, the restaurant Kalkies sells fish and the restaurants Harbour House, Polana, Sirocco, Live Bait and Lucky Fish & Chips offer a variety of fish products to their customers.

Close to the harbour, there is undeveloped ground which is being used as parking space for visitors visiting the harbour and the harbour restaurant. Next to the parking space, an undeveloped piece of land is called 'The Point' and the local fishing community claim it to be their land.

The harbour has had an active harbour master with offices in the centre of the harbour. In the western part of the harbour, a functional cradle and slip facility to provides vessel maintenance.

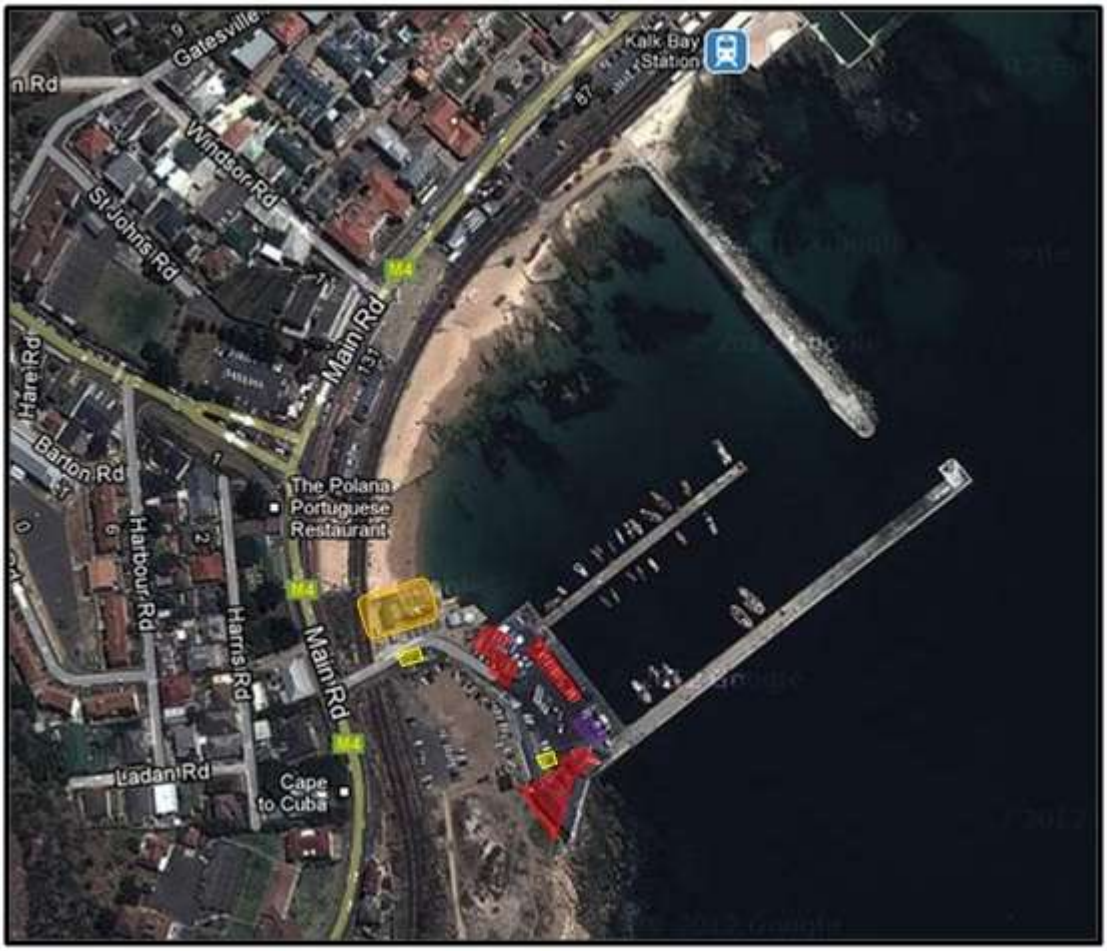


Figure 50: Close-up Kalk Bay Harbour

b. High-level harbour infrastructure assessment[24]

Kalk Bay harbour is integral with a tourist area and attracts tourists to the harbour and to adjacent restaurants. Some fish are sold off the quay.

There were a number of vessels in Kalk Bay harbour during the survey. Three were off loading. The remainder appeared inactive.

- Quay side

The quay side is being up graded mainly to give tourists a better aspect and sales venue for the fish. Toilet facilities are being upgraded

- Jetty

[24] Based on brief site visits during May/June 2012

The jetty is in good condition.

Figure 51: West jetty

- Breakwater

The breakwater appears in satisfactory condition but is often overtopped by waves during storm conditions. Boats berth bow up to the inner side of the breakwater and during high swell conditions cannot be moored close to it.

Figure 52: Breakwaters with a fishing vessel berthed on the outer breakwater

- Slipway and cradles

Two slipways are provided. Both are in fairly good condition and are being refurbished.

Figure 53: 90 ton slip

Figure 54: 30 ton slip

- Services

Limited services are provided on the jetties.

- Beach

There is a popular beach on the western side, bounded by a railway line.

- Car parks

There is a lower car park which gets full quickly. There is an upper car park which has a split ownership with the municipality, the railway property and the province. This could be developed into community owned commercial space if the parties can co-ordinate their approvals.

- Summary

Kalk Bay is a mainly a fishing and tourism harbour (with small tourist boat activity and land—side activity relating to fish sales, and restaurants). In general it is in condition with some in going maintenance. Unfortunately fishing vessel activity has declined in recent years due to the lack of fish in the Bay, a decline in lobster catches, and the more economic and faster modern ski-boats operating out of Millers Point.

c. Fishing rights, activities and dynamics

Kalk Bay is primarily a traditional linefish harbour and rock lobster landing point. Kalk Bay harbour landings have decreased steadily over the years. In 2006, 91 tons of linefish and 516 tons of rock lobster were landed, and although current data were not available, these figures are currently much lower, particularly for rock lobster. Twelve small (<10m) and 19 (>10m) fishing vessels were active in Kalk bay in 2006, employing some 350 crew. No processing facilities exist in Kalk Bay harbour apart from open air fish linefish cleaning tables.

The predominantly traditional linefish vessels (wooded bakkies, chukkies and deck boats) are not competitive against the modern high powered ski-boats which are highly mobile being towed by road to where fish are running. Ski-boat launching into False Bay has largely shifted to Buffels Bay in the Cape Point Reserve giving these vessels more rapid access to fish runs of snoek and yellow tail and also allowing them to reach the market more quickly than the traditional Kalk Bay fleet. Some thus argue that the allocation of “traditional” linefish licences is an unfair constraint on traditional fishers.

Innovative solutions are thus required if the traditional wooden fishing fleet in Kalk Bay is to be preserved. This could include closure of local/traditional fishing grounds in False Bay to outside vessels. Tourism charter trips have reportedly not worked as frequent East winds make sea conditions too unpleasant for tourists.

d. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Traditional harbour with original wooden fishing vessels	Not a primary fishing harbour anymore: limited fishing activity (linefish and lobster) in harbour due to lack of fish in False Bay and Buffels Bay launch site in Cape Point reserve
Harbour generally in satisfactory condition.	No facilities for fishing crew coming from Khayelitsha that needs to sleep in Kalk Bay due to limited transport options in AM
Current DPW maintenance of centre quay	Harbour not deep enough to accommodate yachts
Embedded in an important tourism centre, close to Cape Town	Slipway and haul-out facilities need (inexpensive) maintenance
Day (fresh fish market) and night (Harbour House) tourists	Limited water space for water side expansion
Kalk Bay train station and connection to Cape	Limited parking space

Town and Muizenberg	
	Undeveloped western part of the harbour ('The Point') remains dormant
	High volume of petty crime: car, houses and boat break-ins although harbour guards in place
	Ineffective harbour users committee.
	Inefficient harbour management structure: DAFF, DPW and Transnet
	Inefficient management of skilled security guards (mainly from the DRC)

Opportunities	Threats
Cultural focal point for traditional fishing community with retail outlet point for fresh fish, traditional processed products and other products. Enhanced facilities and mentorship will enhance enterprise development	Limited fishing possibilities in False Bay
Small scale fish value adding industries: e.g. smoking of Snoek, anchovies producing facility	Fast ski boats fishing from Millers Point who can get to the fish grounds quicker and cheaper and reach the markets earlier than the traditional chukkies in Kalk Bay. Inconsistent load inspection at Miller Point
Harbour events	Fishing and tourism very weather dependent: South-eastern winds in summer prevent boats sailing out
Development of 'The Point'	Unregulated Kalk Bay beach attracts vandalism
Offer by Harbour House to tar parking space outside harbour	
Potential for visiting yachts (this needs to be explained to the community who see it as a threat by the rich)	
Whale watching tours	
Park & Ride or Park & Train connection with Muizenberg	

Table 16: SWOT-analysis Kalk Bay

e. Examples of events in the harbour and vicinity

Date	Event
Kalk Bay Fish Fare	March
Kalk Bay Harbour Fish Market	Every day around 1pm

Table 17: Events: Kalk Bay

3.3.4 Gordon's Bay

Gordon's Bay falls under the Cape Town Metropolitan Municipality. Gordon's Bay is a small seaside town on the Eastern edge of False Bay. It is 50 kilometres from Cape Town and one of its beaches, Bikini Beach next to the harbour, has been awarded with a Blue Flag status.

Figure 55: Gordon's Bay Harbour

a. Current harbour activities and facilities

The Gordon's Bay Harbour can be found south west of Gordon's Bay. The Gordon's Bay Yacht Club in the southwest corner of the harbour has a large foothold in the harbour, occupying three jetties. Next to the harbour is a ship repair haul, which is currently being renovated by DAFF. In the southern part of the harbour the Harbour Lights restaurant can be found adjacent to Gordon's Bay Sea Services. The central area of the harbour is being occupied by parking space.

The northern part of the harbour is being used by the Navy and its South African Naval College. Next to the Naval College, the restaurants The Happy Oyster and the Tavern can be found.

Figure 56: Close-up Gordon's Bay Harbour

b. High-level harbour infrastructure assessment[25]

Gordon's Bay is a mixed use harbour, with the majority of the water space being used for a yacht Marina (Gordon's Bay Yacht Club), the SA Navy (Gordon's Bay Academy), and a small fishing boat quay with a slipway and a cradle.

[25] Based on brief site visits during May/June 2012

Figure 57: Gordon's Bay Harbour

- Yacht Marina

The marina is constructed of floating pontoons and is fully utilised.

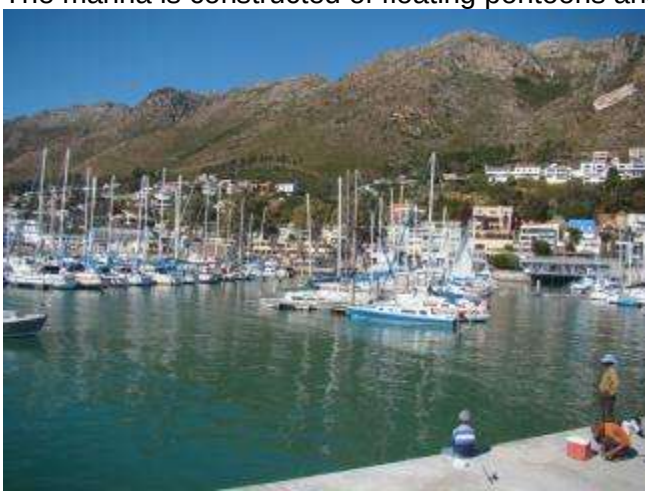


Figure 58: View of marina

- Breakwaters

The breakwaters have been recently maintained which has included internal reinforcing and new dollosses

Figure 59: South breakwater internal

Figure 60: South Breakwater external

Figure 61: North Breakwater

It is understood that there is some sand build-up at the entrance to the harbour and some scouring of the local Bikini Beach (which is blue flag status). This needs further investigation of a by-pass system.

Figure 62: Bikini Beach

- Harbour facilities

The cradle and the slipway are being maintained and are in generally good condition.

Figure 63: Cradle and slip under maintenance

There are two small quays for fishing vessels which are in good condition.

Figure 64: Offload jetties – mainly lobster

- Summary

Gordon's Bay harbour is in good condition and maintenance is being done. The fishing aspects are small compared to the Yacht Club and Navy usage. Some investigation of the entrance and scouring of the beach is necessary.

c. Fishing rights, activities and dynamics

Fishing activity has all but ceased in Gordon's Bay with only four lobster vessels using the harbour at the time of the consultants visit in 2012. It is not expected that fishing activity based at Gordon's Bay harbour will increase.

d. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Mixed use harbour: tourism, recreational and yachting	Not a primary fishing harbour anymore: only a few lobster fishing boats use the harbour on an occasional basis
Harbour generally in good condition	High levels of sand in the harbour: sand slipping through the harbour wall at the Bikini Beach side
Current investment by DPW in maintenance of slipways and haul out facility	Limited available free space in harbour
Co-operative and active harbour users committee and harbour management	Neglected maintenance of public harbour facilities
Controlled informal trading: arrangements between HUC and informal trader	Harbour entrance fee (R5) in summer used by tourists as an inexpensive long term parking fee
Blue Flag (Bikini) Beach next to harbour	
Several restaurants and a yacht club in the harbour	

Opportunities	Threats
Sailing school in harbour. Opportunity for other sea based recreational youth development activities.	Increased levels of sand in harbour
Harbour events	Limited parking in summer, preventing tourists coming into the harbour
Incorporate harbour into town (fence has already been taken away) and make harbour a mini town centre	
Red tourist bus including Gordon's Bay in the route	
If parking is managed well (e.g. max parking time of 2 hours), parking would not pose a huge problem anymore.	

Table 18: SWOT-analysis Gordon's Bay

e. Examples of events in the harbour and vicinity

Date	Event
Broadbill Classic	May
Gordon's Bay Anchor Festival	October
Winter Wonderland Lights Festival	June/July
Western Province Championships (5&20km race)	July
Wine on the Water Festival	November
Summer Festival – Bikini Beach	December
SA Nay – Open Day	October
NSRI-Gordon's Bay has got Talent at the yacht club	May
Yacht Club – Gaul Regatta annually	June
Suider Ooster Festival	[Annual]
Broadbill Classic Fishing Competition	[Annual]
Beach Front - Fun Park	December

Table 19: Events Gordon's Bay

3.4 South Coast harbours

3.4.1 Regional socio-economic context

The South Coast harbours are all within the boundaries of the Overberg District Municipality. The Overberg District Municipality's total population is estimated at 197,307 (2011 – projected)[26].

A key economic activity in the municipality is the 'agriculture, forestry and fishing' sector. It contributed 12.1% (or R850 million) of the district's economy in 2010. The contribution to the district economy decreased, however, between 1999 and 2009, by 1.5%. The 'wholesale and retail trade, catering and accommodation' (which encompasses part of the tourism industry) contribute 13.7% to the district's economy and grew by 3% between 199 and 2009[27].

The 'agriculture, forestry and fishing' sector contributes 21.3% to employment in the district, while the 'wholesale and retail trade, catering and accommodation' sector contributed 10%. The unemployment rate in the Overberg District is 17.7% (2007).

3.4.2 Hermanus

Hermanus falls within the jurisdiction of the Overstrand Municipality and the municipality is structured into 13 wards of which Hermanus falls under ward 4. According to the Hermanus' tourist brochure, '*the natural beauty of the area has inspired many visitors, and over the years Hermanus has become a popular holiday destination. World-renowned for it biodiversity, Hermanus has an abundance of plant, animal and bird life – a paradise for nature lovers*.'

Figure 65: Hermanus Harbour

a. Socio-economic trends

Demographics	2010/2011
Total municipality population	87.747
Population growth	5.58%
Number of households in municipal area	31 357
Number of indigent households in municipal area	5 241

[26] Western Cape Provincial Treasury, 2011, Regional Development Profile - Overberg District (working paper)
[27] Western cape Provincial Treasury, 2011, Regional Development Profile - Overberg District (working paper)

Unemployment	24.1%
People older than 14 years illiterate	15.5%
Population by gender	47.73% (females) and 52.26% (males)
Population race categories: – African – Coloured – Indian – White	 21 505 27 403 575 25 062
Manufacturing Wholesale and retail trade Finance, property, etc.	1840.64 864.39 1766.83
Agric, forestry and fishing	849.94
Infrastructure services	600.69

Table 20: Demographics Overstrand Municipality

b. Current harbour activities and facilities

Hermanus has two harbours; the Old Harbour and the New Harbour. The Old Harbour is located in the centre of Hermanus and is not operational, except for a museum and a shark research institute. The New Harbour is the proclaimed fishing harbour and is located on the south west boundary of Hermanus. As can be seen in the figure below, the harbour area is big, but the harbour's primary activity is abalone farming which now occupies all the industrial land adjacent to the harbour. The existing complex of four abalone farms is currently expanding on municipal land to the west of the harbour.

Besides abalone farming, the New Harbour houses abalone processors (Walker Bay Canning, SPP Canning and Combined abalone processors), an aquaculture feed manufacturer (Marifeed) and a commercial fishing company (Lusitania) which operates a retail outlet, and several tourist facilities such as the Harbour Rock Café and the Gecko Bar. At the jetty, tour operators have their offices for tourists to book whale watching tours and shark diving around Hermanus. The harbour facilities include a large slipway, a ship repair haul and a restaurant.

Figure 66: Close-up Hermanus Harbour

c. High-level harbour infrastructure assessment[28]

Hermanus is a now primarily a tourism/ recreation use harbour as commercial fishing activity has virtually ceased. There is a good tourist trade with strong demand for whale watching charters, and recreational and small boat fishing is accommodated with a slipway, moorings and skiboat yard. There are quays for larger fishing boats but they appear not to be used. A diving school takes up one jetty. A refurbishment is being done on the slipway and cradle (which is reportedly not used much). Shore based facilities for tourists doing whale watching charters are lacking and there is a lack of parking facilities for cars and boat-trailers which results in congestion during peak periods.

[28] Based on brief site visits during May/June 2012

Figure 67: Hermanus Harbour

- Access

Access is limited by a narrow approach road.

Figure 68: Road leading to harbour

- Small boat facilities

There is a wide slip in good condition, heavily used for trailerable boats. There are anchor moorings available in the harbour, protected by the breakwater.

Figure 69: Slipway in use

Figure 70: Moorings for small ski-boats

- Slipway and crane

The slip way, rails and cradle are being refurbished and in good condition. The shear legs crane is being refitted.

Figure 71: The slipway

Figure 72: Shearlegs

- Quays

The quays are in good condition. One is used mainly for tourist boats. They have higher freeboard than would be user friendly for tourists.

Figure 73: Tourist access quay

Figure 74: Main fishing boat quay

One quay is used by a diving school and commercial divers.

Figure 75: Diving quay

- Breakwater

The breakwater has been refurbished and the roadway resurfaced. There is some degradation of the lower section and cracks can be seen. However, the quay appears well armoured and at no risk.

Figure 76: Breakwater roadway

Figure 77: External armouring

- Summary

Hermanus harbour is mainly used by smaller ski-boats and tourist craft. Commercial fishing operations have effectively ceased. The harbour-linked industrial land is a major abalone aquaculture development node. Shore-based harbour infrastructure to accommodate the shift to tourism and recreational ski-boat activity is required.

d. Fishing rights, activities and dynamics

Commercial fishing activity at Hermanus Fishing Harbour in 2012 had virtually ceased and the main activities are now whale watching charters and recreational ski-boating which is very seasonal.

The Lusitania cold storage facility has been closed and now only the fresh fish retail outlet remains operational.

Abalone aquaculture is the major activity now occupying the harbour land. Three large abalone farms (Aquafarm, HIK, and Abagold) now occupy all the available land with a new major expansion underway on municipal land. Three abalone processing plants and one abalone feed factory are also present on the harbour land.

e. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Mixed use harbour: recreational ski-boat fishing and tourism	Not a primary fishing harbour anymore – no commercial fishing vessels
Harbour is generally in good condition	Breakwater needs work (not urgent)
Recent DPW maintenance of slipways and harbour wall (topping) is good	Neglected maintenance of harbour facilities (toilets, no visitor centre)
Good ski boat facilities	Ineffective overall harbour maintenance plan: neglected maintenance of harbour buildings
Active HUC	Shore based facilities not suitable for tourist waiting for whale charter vessels
Functional harbour master	Parking and traffic flow is not well organised for skiboat launching and peak holiday season traffic
Whale watching capital of the world (both sea and land-based): whales, fish and seals	Sailing boats are mooring in Gansbaai as Hermanus harbour lacks moorings
International tourist destination (20.000 tourist from May to September), both in summer (general tourism) and in winter (whale tourism)	

Opportunities	Threats
Neglected and open space around Harbour Rock restaurant could be developed	DAFF not allowing any vendors on the harbour quay anymore
Possible cultural focal point and retail site for traditional fishers to sell products	Traffic and parking during peak season
Harbour events	Tourist are being put off by harbour entrance fee (R5)
Yacht race from Hermanus to Gansbaai	Harbour users believe that at government level, all planning stops.
Harbour users suggested an interactive fishing museum in harbour	Harbour very weather dependent
Sportfishing tourism (December to May)	
Arts & Craft in harbour	

Table 21: SWOT-analysis Hermanus

f. Examples of events in the harbour and vicinity

Date	Event
Hermanus Whale Festival	September
Hermanus Sea Rescue Music Festival	April
Energy Expo	April
Wheels & Runners Hermanus 2011	May
Hermanus Times Kalfiefees	August
Hermanus Wine & Food Fair	August
Hermanus Bridal & Party Fair	August
Hermanus Flower and Eco Fair	September
Showcase of Hobbies & Lifestyles	October
Hermanus Christmas Concerts	December
The White Wine Festival - A Celebration of New Wines	May
Whalers 10KM	December
Old Harbour Museum Seafood Festival	March
Hermanus Stanford Canoe Race	April
Fernkloof Wild Flower Show	September
Whale Festival Half Marathon	September

Table 22: Events - Hermanus

3.4.3 Gansbaai

Gansbaai falls within the jurisdiction of the Overstrand Municipality and the municipality is structured into 13 wards of which Gansbaai falls partly under ward 1 and partly under ward 2.
The Gansbaai tourist brochure describes '*Gansbaai is situated amongst a number of small bays with unspoiled beaches. Shark cage diving is a must as is whale watching from a boat or land. Outdoor activities include 4x4 trips, hiking trails, a visit to an abalone farm of fishing. The fishing Harbour of Gansbaai, one of few remaining on the West Coast, is worth a visit. There is a restaurant in the harbour. The annual Crayfish Festival is held over Easter. For a real Great White shark experience visit Dyer island, where the seals in Shark Alley are preyed on by the sharks*.'

a. Socio-economic trends

The socio-economic trends for Gansbaai are similar to those of the socio-economic trends for Hermanus as both towns form part of the Overstrand municipality.

b. Current harbour activities and facilities

Gansbaai has two harbours; the Old Harbour and the New Harbour. Both harbours are operational, although the Old Harbour is vulnerable to bad weather and tends to fill up with sand. The Old Harbour has many facilities such as an operational slipway and ship repair haul and has some tourism facilities such as newly renovated toilets and showers, restaurant (currently closed), fish retail, a whale watching charter business and takeaway outlet. The harbour furthermore provides enough space for local fishermen to repair their nets. The pelagic

fishmeal/canning factory of Gansbaai Marine has a large foothold in the harbour and employs approximately 600 local people mainly on a temporary basis when operational.

The New Harbour land and harbour basin are largely unutilised. Gansbaai Marine has several storage facilities and there is a large abalone farm (Premier) bordering the harbour fence. There are no tourism facilities in the New Harbour.

Figure 78: Close-up Gansbaai Harbours

c. High-level harbour infrastructure assessment[29]

Gansbaai harbour comprises two separate sections. The old Harbour has a fish processing factory with a wide slip way and cradle. The new Harbour is underutilised but has quays for fishing boats and space for anchorage.

[29] Based on brief site visits during May/June 2012

Figure 79: South (old) Harbour with processing factory and other business premises

Figure 80: North (new) harbour with quays and anchorages

- Quay sides

The quays have been maintained. The fish processing factory perceives the need for a longer quay.

Figure 81: Processing factory quay south harbour

Figure 82: Berthing quays north harbour

- Harbour facilities

The slip ways and cradle are maintained and are in good condition.

Figure 83: Cradle

The slipway is well used by small fishing boats

Figure 84: Slipway

Nearby tanks need to be assessed for corrosion.

- Breakwaters

The north (old) harbour outer breakwaters are not in good condition. The outer breakwater has been armoured but there is also some stabilisation on the inner side, which does not look effective.

Figure 85: Outer breakwater external

Figure 86: Inside of outer breakwater

Maintenance is being done on the inner breakwaters.

Figure 87: Contractors notice, north harbour

In the south (new) harbour there are reports of a leakage under the breakwater which is causing silting. This requires attention.

Figure 88: South harbour outer breakwater

- Summary

Gansbaai is a harbour system with good potential. It appears that the harbour around the processing factory is being maintained, but the New harbour is deteriorating and is not much used. Silting needs investigation.

d. Fishing rights, activities and dynamics

Gansbaai is a major pelagic landing point with Gansbaai Marine processing 27,000-50,000t of fish per year into tinned pilchards and fishmeal. Other landing and processing operations at Gansbaai Harbour include lobster, abalone and a small amount of linefish. Active fishing vessels were 48 small (0-10m) and 18 large (>10m) in 2006 with 500 active crew (DEAT, 2008b).

The Gansbaai marine factory employs 597 people, mostly part-time (180 days/year) and pays in the region of R40 million in wages. It is estimated that the factory contributes R250 million to the Gansbaai local economy annually. The factory currently operates at around 50% of capacity due to a lack of access to quota raw fish. Gansbaai Marine operates eight pelagic vessels with which it catches its own and others quota. Additional fish is bought in from other owner operated vessels; however the company representative reported that because it is a relatively small operation it cannot pay the prices the larger West coast factories do.

The factory deals with an ongoing conflict with Gansbaai town due to the smell of the fishmeal processing operation. This is potentially exacerbated by the planning of residential developments on the land overlooking the harbour.

Abalone aquaculture has become a major local industry with three abalone farms adjacent to the town (I&J, Roman Bay and Premier Fishing). I&J and Roman Bay are planning major expansions of their production. The Premier Fishing abalone farm has recently expanded up to the boundary of the fishing harbour. There is a case to consider allowing abalone aquaculture service industry development on the unutilised land within the harbour precinct as it is unlikely that there will be a demand for this land by commercial fishing operations. An attempt to establish offshore cage culture of salmon using the harbour as a service base failed due to rough sea conditions which made the operations non-viable. If the abalone fishery is to be

rehabilitated by means of reseeding hatchery reared abalone, the harbour would provide a useful infrastructure to support sea-based operations.

There is one whale watching operator based in Gansbaai Harbour. Abalone fishing operations out of Gansbaai have declined with the cut in TAC.

Gansbaai harbour is a popular recreational skiboat launch site, particularly in December. With the growth in tourism and recreational boating in the Walker Bay area, and potential recreational vessel routes between fishing harbours, there is a case for developing the new harbour into a small craft harbour with associated land based services and tourism facilities.

e. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Predominantly an industrial fishing harbour with small pelagic, lobster, abalone vessel and processing facilities	Fish smell in harbours (property development / town resident point of view)
Employment (income) contribution (590 workers in Gansbaai Marine fish factory)	Breakwaters need maintenance: increased levels of sand in the harbour (due to hole in breakwater)..
Slipways in good working condition	Upgrading of harbour facilities would be expensive and fishing industry buy-in would be necessary
Recent DPW infrastructure maintenance (e.g. toilets)	Shallow harbours. New harbour needs dredging (general infrastructure)
Local spatial development: undeveloped space within harbour	Limited parking space in high season
Co-operative and active harbour management	Harbour users report a disconnection between them and DAFF/DPW (unresponsive)
Municipality has filed several restructuring/development plans for the harbour (however blocked by DPW)	Lack of common vision (municipality and harbour user interviewees)
International tourists visit Gansbaai	Tourists don't see harbour as a tourist destination, only come for whale watching from harbour or shark cage diving from Kleinbaai. Tourist have perception of nothing to do in Gansbaai besides shark cage diving.
Restaurants in harbour	One-day shark cage dive tourism
Shark cage diving activities in Kleinbaai	
Whale watching from harbour	

Opportunities	Threats
Possible development of the New Harbour for small recreational craft, with land based development of associated services and tourism facilities	Hermanus has better all-round tourist attractions
Aquaculture service industry expansion in New Harbour	Viability of maintaining pelagic fish processing –Gansbaai Marine factory operates below capacity due to restricted access to fish quota

	and higher prices paid for quota by bigger companies on the West coast
Small scale fisher focal point facility – possible value adding (e.g. anchovy is targeted for human consumption), retail, cultural aspects.	Low economic activity in Gansbaai
Harbour events	Wind direction: wind creates in-harbour wave in old harbour
Boat building and repair. Fishing boat annual surveys and repair facilities for hull, machinery and electrics	Competing development issues for harbour land
Portions of the New Harbour land and water are underutilized. Industrial land available in the New Harbour	
Underutilized tourism opportunities	
Potential linkages between Kleinbaai/centre/Harbours	

Table 23: SWOT-analysis Gansbaai

f. Examples of events in the harbour and vicinity

Date	Event
Lighthouse to Lighthouse Mountain Bike Ride	February
B'Bos Feesbasaar	March
Baardskeerdersbos Art Route	April
Baardskeerdersbos Feesnaweek	June
Baardskeerdersbos Art Route	September
Danger Point Half Marathon	December
Wynproegilde	Last Friday Of Every Month
Kreef Derby	April
Fees Van Die Ganse	June
Strandveld Hiking Club Hike	First Saturday Of The Month, Last Thursday & Friday Of Every Month
Sourdough Bread Making Workshop	Every Saturday
Entertainment @ Lighthouse Tavern	Evening
Pearly Beach Basaar	March
Sound Healing Playshop	March
Gansbaai Church Basaar	April
Herberg aan See Basaar	September
Christmas Market	December
Markdag	Every Friday

Table 24: Events - Gansbaai

3.4.4 Arniston

Arniston falls within the jurisdiction of the Overberg District Municipality and the municipality is structured into 5 wards of which Arniston falls under ward 5. The Arniston tourist brochure describes '*The name Arniston comes from a transport/hospital ship which sank near the coast in 1815. Arniston or Waenhuiskrans has some quaint old whitewashed and thatched cottages. Visit the fishing village Kassiesbaai which is 200 years old and declare a National Monument. Mingle with, and experience the customs of the locals, who make a living from the sea*.'

Figure 89: Arniston Harbour

The traditional fishing community of Arniston is still a very cohesive with a strong sense of tradition and identity. The still operational fishing harbour, with wooden fishing vessels still located there, is central the character and appeal of Arniston to tourists.

a. Socio-economic trends

Demographics	2009
Municipal population	26 474
Arniston Population	1 373
Number of indigent households in municipal area	8 028
Number of households in municipal area	2.781
Unemployment	14.2%
Illiterate people older than 14	37.4%
Population gender distribution	51.9% females and 48.1% males
Key economic activities in% of GDP: – Agric, forestry and fishing – Wholesale and retail trade – Finance, property, etc.	 185 211 165 808 263 602
Economic activity by sector (R m)	945 399

Table 25: Demographics Overberg District Municipality

b. Current harbour activities and facilities

Arniston has a small harbour with limited facilities. The harbour has a large slipway which is very slippery and is only accessible when the tide is high. The harbour has little fishing activity and no tourism facilities. The closest tourism facilities (two restaurants) can be found in Kassiesbaai, the fishing village north of the harbour where the fishing community is living. There is a small boat maintenance section in the harbour but it does not seem to be operational. There are also several fish cleaning facilities.

Figure 90: Close-up Arniston Harbour

c. Fishing rights, activities and dynamics

Arniston is solely a traditional linefishing harbour closely associated with the Kassiesbaai fishing community.

The harbour accommodates 8 chuckies and 4-5 skiboats. The vessels operate under Interim Relief phase 6 permits. Two vessels did not receive permits. 111 tons of linefish were landed in 2006 but current data were not available.

The possibility of an abalone farm at Arniston was investigated, but the partner abalone farm pulled out due to insufficient capital. Sea water temperatures however appear to be too high for abalone farming in summer (>25°C).

d. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Traditional 200-year-old fishing village Kassiesbaai: a national heritage site and a major international tourist attraction	Launch slipway is dangerous due to wave exposure and steep and slippery slope. Some fishing boats haven't been out for 3 months
Well preserved local heritage and local community management institution	Slipway pulley out of order
Fish cleaning facilities in harbour	Ineffective harbour users committee
Warm sea water temperatures in summer (28C)	Lack of a tourism portal to promote traditional community access to tourist market

Opportunities	Threats
Enhance opportunities in tourism value chain for traditional fishing community.	Struisbaai generally more attractive for tourists and house owners
A tourist friendly fisher focal area with retail opportunity (harbour is fenced from public for safety reasons)	
Branding of sustainable fish from a traditional community to enhance market access and value	
Linking Arniston to Walker Bay tourism route	

Table 26: SWOT-analysis Arniston

3.4.5 Struisbaai

Figure 91: Struisbaai Harbour

Struisbaai falls within the jurisdiction of the Overberg District Municipality and the municipality is structured into five different wards. Struisbaai falls under ward 5. The Struisbaai tourism brochure describes '*the picturesque Struisbaai Harbour is extremely popular among visitors especially guests who are thrilled to experience one of the last remaining historic and cultural fishing harbours on our South African coastline, as well as the unique tourist attraction of the community of giant stingrays that live within its sheltered waters. A considerable number of the permanent residents make their livelihood from the sea. Trawling the rich fishing grounds with their little boats, they set out from the safe fishing harbour, a favourite meeting place for anglers, traders and visitors.*'

a. Socio-economic trends

Demographics	2009
Municipal population	26 474
Struisbaai Population	2 052
Number of indigent households in municipal area (2009/2010)	8 028
Number of households in municipal area	2.781
Unemployment	14.2%
Illiterate people older than 14	37.4%
Population gender distribution	51.9% females and 48.1% males
Key economic activities in% of GDP: – Agric, forestry and fishing – Wholesale and retail trade – Finance, property, etc.	 185 211 165 808 263 602
Economic activity by sector (R m)	945 399

Table 27: Demographics Overberg District Municipality

b. Current harbour activities and facilities

The Struisbaai Harbour is located at the north-eastern part of Struisbaai. The harbour has a large parking area, several small cafes and the larger restaurant Pelican's Café. There are two slipways. In the centre part of the harbour is a covered area which is being used by the fisherman to weigh their catch. Next to the harbour is a large sand beach which is being used in summer by the Struisbaai locals to swim and relax. The fishing and beach activity goes hand-in-hand. The harbour furthermore houses a large colony of stingrays, attracted by the fish the fishermen bring in. There is no current development in the harbour, although a large 50-room hotel is being planned by Langezandt Fishermans Village at the south-western part of the harbour.

Figure 92: Close-up Struisbaai Harbour

c. Fishing rights, activities and dynamics

Struisbaai is an important linefish harbour with 409 tons of linefish landed in 2006 (DEAT, 2008b). In 2006, active vessels of Arniston and Struisbaai were 4 small (0-5m) and 32 medium size (5-10) linefish boats employing 250 crew. As with all linefish harbours the trend will be downward however more recent data were not available.

A fish buying depot receives linefish which are then transported by road to Cape Town.

Struisbaai has one whale watching charter operation.

d. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Predominantly a line fish harbour	Difficult to access water at low tide; effects tourist trips
Fish cleaning facilities	Inadequate harbour maintenance (high levels of sand in harbour). Harbour needs dredging
Recreational use of harbour and adjacent beach by community. Attractive harbour integrated in surrounding area (no harbour admission fee)	Isolated, ineffective public transport to Struisbaai

Several facilities (coffee shop, small food, fish outlets) having access to daily fresh fish	Recreational use not part of harbour management
Good vision by local stakeholders of overall tourism strategy and the harbour being a part of that	
Tourists attracted by sting rays in harbour and wine farms in the area.	

Opportunities	Threats
Support small scale fishers to add value to add to processing and retail e.g. market access through WWF initiative on sustainability branding	Potential conflict of 50 room hotel adjacent to harbour
Small scale fisher premises as cultural and market access focal point	Limited spending by local tourism
High end tourism development	Security and safety management
Growth of adventure tourism	
Enhance harbour area as a fishing/ recreational hub	

Table 28: SWOT-analysis Struisbaai

e. Examples of events in the harbour and vicinity

Date	Event
Struisbaai Yellowtail Festival	March
Struisbaai Spring Festival	September
Adrenalin Struisbaai 5 Spesie	March

Table 29: Harbour Events - Struisbaai

3.4.6 Stilbaai

Stilbaai falls within the jurisdiction of the Hessequa Local Municipality and the municipality is structured into eight different wards. Stilbaai falls under ward 1. The Hessequa Annual Report 2010/2011 describes Stilbaai as '*Stilbaai, also known as the Bay of Sleeping Beauty, hosts a variety of B&B lodges and a friendly warm coast for surfing and swimming. Stilbaai is host to a number of interesting archaeological sites, including ancient fish traps thought to have been built by early ancestors of the Khoi people of the Southern Cape, and a shell landfill that has been carbon dated to around 1,000 BC. Another archaeological site is situated in a group of caves at Blombos cave, about 12 kilometres from Stilbaai. Artefacts found at Blombos have been carbon dated to around 77,000 BC, making it the oldest known human settlement today*.'

Figure 93: Stilbaai Harbour

a. Socio-economic trends

Demographics	Demographics
total population within the municipal area:	52.648
Population growth	10.7%
Number of households in municipal area	15.972
Number of indigent households in municipal area	4.375
Real estate activities	R268 182 m (25.70%)
Agriculture and hunting	R146 147 m (14.01%)
Retail trade and repairs of goods	R141 154 m (13.53%)
Fishing, operation of fish farms	R11 242 m (1.08%)
People older than 14 years illiterate	25.8
Population gender	50.84% females and 49.16% males
Population race categories: – African – Coloured – Indian – White	 2 244 33 419 61 16 924

Table 30: Demographics Hessequa Municipality

b. Current harbour activities and facilities

The small Stilbaai Harbour is located in the south-eastern part of Stilbaai. The harbour has a large parking area and two slipways of which the larger one is currently under repair. The harbour does not offer any tourism facilities and has been closed off in the eastern part, so visitors can no longer pass through. A large building, formerly occupied by I&J Fishing, is currently being used by DAFF to store the goods for the harbour renovations. In the western part of the harbour, Viking Inshore Fishing has a small fish cooling facility and a fish shop. Furthermore, a small outdoor fish cleaning facility is present.

Figure 94: Close-up Stilbaai Harbour

c. Fishing rights, activities and dynamics

Stilbaai is an important regional linefish harbour where 382t of linefish were landed in 2006. The trend of linefish landing is sharply downwards. In 2006, 48 small (0-10m) and 5 large (10-15m) linefish boats were present in Stilbaai.

Viking fishing operates a fish receiving depot from where fish are transported by road to Cape Town. An I&J depot in the harbour had closed some years previously.

d. Stakeholder views on strengths, weaknesses, opportunities and threats

Strengths	Weaknesses
Predominantly a line fish harbour	Current harbour management only recognizes fishing. Sports, community users and tourism excluded (traditional servitude through harbour have been closed)
Harbour has strong cultural element to fishing	Governments arrangements of harbour are not conducive to economic development
Current DPW maintenance of large slipway	Limited local community involvement in DAFF/DWP projects

Cooperative municipality with vision about integration of harbour into tourism/ recreational development	Underutilized assets in the harbour (former I&J depot, burned-down restaurant)
Improved harbour security	Far from Cape Town, remote, off the N2
	Harbour currently a tourist 'dead spot' due to lack of facilities and integration

Opportunities	Threats
Facility in harbour for traditional fishing community for cultural aspects, fish processing, retail.	Sustainability of line fish resource
Redevelopment of burned-down restaurant former I&J depot	
High end tourism potential, integrated with the Garden Route	
Integration into eco-tourism walking route between town and nature reserve	
Part of fishing harbour route	

Table 31: SWOT-analysis Stilbaai

e. Examples of events in the harbour and vicinity

Date	Event
National Canoe Marathon	December
Stilbaai Food & Wine Festival	December
Stilbaai MTN Strandloper Festival	September
Stilbaai Animal Protection Arts and crafts Fair	March
Annual Pampoenfees	March
Touch Rugby	December

Table 32: Events - Stilbaai

4 Benchmarking of international approaches to fishing harbour

4.1 Introduction and approach to benchmarking

In this section, a synopsis of international approaches to development of fishing harbours through realising alternative economic opportunities is presented, followed by a summary of the applicability of those approaches to the harbours in South Africa.

Secondary research on several developed and developing countries on the development of fishing harbours through additional activities such as aquaculture, tourism, and supply of goods and services linked to the fishing value chain has been performed and based on that research, interviews with local harbour stakeholders were held. The Whitstable Port in the UK has been selected as a benchmark as this harbour has gone through a similar revitalization as the 12 proclaimed fishing harbours in the Western Cape potentially go through. The Canadian Small Craft Harbours Programme has been researched in respect of the applicability of its fishing harbour management programme for the Western Cape harbours.

4.2 Benchmarking summary

Country / region	Summary

UK	- Establish Harbour Boards without harbour user forums as members for two reasons:
	  ○ Maintain independence.
	  ○ Ensure high quality Board members
	- Organisational support might be necessary to ensure all stakeholders can articulate their needs and issues in the user forums.
	- Fishing harbours attract tourists because they are fishing harbours – make sure these interests are listened to.
	- Infrastructure and maintenance can only be financed by the harbour once profitability is established.
	- Even then, it is important not to alienate the national government as there may still be a need for national funding if significant infrastructure investment is needed.

Canada	- Possible to combine nationally-owned assets with local management through a leasing agreement. - Harbour Authorities can fund operating costs but not significant infrastructure costs. - Inclusion of harbour users/fishermen on the Harbour Authority Board may limit economic diversification efforts. - Requirement for skills and capacity building programmes for the Harbour Authority management/volunteers - Cost-sharing on harbour infrastructure funding between Provincial and national government may be difficult in practice, particularly in managing competing interests of national and local government.
Philippines	- Multi-sectoral collaboration and community participation through Coastal Resource Management Councils (RMCs)

Country / region	Summary
	- Effective coordination model as it allows several municipalities to pool their funds and eliminate boundary disputes. - Activities include planning, fishery stock regulation, information dispersion, government coordination and fishermen support
New Zealand	- The Kaipara Harbour region is a complex area with competing interests involved in the management, development and protection of the region. - Integrated Kaipara Harbour Management Group (IKHMG) was established in 2005 to promote integrated and coordinated management of the Kaipara Harbour and its environs - The IKHMG is a multi-stakeholder group, plays a facilitatory role without having executive powers and coordinating role to ensure consistency across statutory planning documents in the region - IKHMG has harbour region diversification plans (tourism, infrastructure, food and beverage)
The Netherlands	- The Netherlands has three different harbour management models: o Small harbours managed by municipalities o Middle sized harbours managed by a municipality department o Large sized harbours managed by a special purpose harbour entity - All costs (operating and capital) relating to assets within the harbour boundaries are for the account of the municipality/port authority. The central Dutch government is liable for the main waterways and railways.
EU	- The Axis 4 programme supports the sustainable development of fisheries areas. It aims to help develop smaller communities where fishing is in decline. Several fishery and non-fishery activities in France, Spain, Estonia and Portugal provided alternative employment opportunities to local fishing communities.

4.3 Whitstable Port (UK)

Ten years ago, Whitstable Harbour was closed to the public and the fishing activities were insufficiently profitable to maintain the harbour. As a locally-owned asset, Canterbury City Council was subsidising harbour losses of over £100,000 per annum (R1.3m) which was causing local tension. However, Whitstable has successfully diversified its economic activities and transformed itself from a declining, unprofitable fishing harbour in 2000 into a thriving, multi-use harbour that also retains a core fishing industry in the harbour.

Harbour Board management model

In 2001, a new management system was initiated which established a Harbour Board to manage the harbour. Controlled by the local council, but with delegated management authority (as set out in a MoU) authorised by the City Council Executive, the Board manages the finances and development of the harbour, deciding levies and fees, as well as authorising what kind of investments can be established within the harbour. The Board only authorises "harbour reliant" activities on harbour land – for example rejecting supermarket development

applications, but supporting boatbuilding shops and industries. The City Council retains the ability to disband the Board and can override/veto Board decisions.

The Board comprises 5 local councillors, and five independent (but salaried) members appointed following public advertisement. These independent members are not harbour users, but fully independent members appointed based on their specific expertise. By not including harbour users, the Board is representative of wider local interests and has a high degree of professionalism for the independent Board member positions

Impact

Since 2001, Whitstable Harbour has diversified its activities away from fishing into new economic areas. The harbour's key economic activities now include the following:

- Fishing: a fishing fleet of 17-18 day boats still operates from the harbour
- Tourism: restaurants and cafes, guided tours, water sports
- Green energy: the harbour has grown to be an offshore support base for wind farms in the region

The Harbour reported turnover of £900,000 and a **record net profit** in 2011-12 of £210,000 – particularly remarkable as this period also included investments in quay infrastructure, equipment acquisition and further facility upgrading. The Harbour is now **100% self-sustaining** and receives no government support – although this has only developed since profitability has been established in the last 5 years.

In terms of local governance, the new system is now more inclusive of local interests with 1,000+stakeholders and harbour users. While this has meant that decision making and implementation of initiatives now take significantly longer, it is now a community-driven, locally-owned planning process.

Managing competing interests

The lack of direct harbour uses on the Harbour Board makes managing competing interests easier, but it relies on clear lines of communication between the Board and the harbour users, and transparency in the Board's actions. Quarterly "**user forums**" for stakeholders and harbour users are organised to allow discussions and the airing of grievances. These forums are attended by Board members and are minuted and shared among all stakeholders, and actions taken to reflect harbour user concerns. For example, a planned installation of harbour-side railings were moved back to maintain fishermen's boat access.

The Board also facilitated the creation of a fishermen's stakeholder group at the port for their participation in the User forums.

Maintaining the fishing industry

The Whitstable Harbour Master notes that the fishing industry in the harbour is effectively subsidised by the Harbour Board. While they charge £1000 per year in harbour dues, the Harbour Board's maintenance and repair costs for fishing facilities is higher than their contribution towards operating costs. However, the Harbour Master notes that it is important that fishing remains central to the Whitstable's identity as it is still the key activity, and the attraction for many of the tourists and ancillary services that have emerged.

4.4 Fishing harbours in Canada

Prior to the 1990s, Canada's numerous fishing and recreational harbours were federal government assets, as defined in the Fisheries and Recreational Harbours Act. However, following a review of the federal government's role, it was determined that while fishing harbours were of national importance due to their economic significance to the country, recreational harbours were not and were therefore suitable for divestiture.

Beginning in 1995, the central government commenced a divestiture programme, selling off "non-core fishing harbours" and recreational harbours while the Small Craft Harbours Programme (under the Department of Fisheries and Oceans) has been given the mandate of operating and managing the remaining central government-owned "core fishing harbours".

SCH Role

The SCH mandate is to keep harbours critical to the fishing industry open and in good repair, however, it only funds infrastructure directly related to fishing activities. Harbours are encouraged to approach other regional economic development agencies to fund non-fishing expenditure or diversification programmes. The SCH currently manages 1072 harbours - core fishing harbours" account for 920 of these, while the SCH also manages 152 recreational harbours that are planned for divestiture but have yet to be sold.

Harbour management

The SCH promotes the formation of not-for-profit Harbour Authorities to ensure local control of the core fishing harbours. The Harbour Authority Board determines harbour fees and covers operational costs. A Harbour authority board is typically 9-10 volunteers, made up of community members and fishermen.

The SCH also provides planning support to Harbour Authorities focusing on operational planning to address relevant challenges, and long-term planning to determine the Harbour Authorities' needs and funding and project requirements. Other support provided by the SCH includes:

- Provision of a Harbour Authority manual providing governance, HSE, and financial advise
- Seminars and training for Board members

Ownership

Core fishing harbours remain **federal government assets**, and are leased directly to the incorporated not-for-profit Harbour Authorities by the SCH for a nominal value. The Fishing and Recreational Harbour Act allows for leases up to 20 years, but the SCH usually enters into 5-year leases which are then renewed 3 times for a total of 20 years. A Memorandum of Understanding between the Harbour Authority and federal government covering the responsibilities to each party in term of infrastructure costs and other initiatives is signed to ensure clarity in the roles. There has been a significant increase in the percentage of Authority-managed fishing harbours in Canada, increasing from 19% in 1995/6 to 78% in 2011/12.

Challenges

The SCH model of fishing harbours management in Canada has faced challenges recently, particularly in accessing enough funding to support the required maintenance for all the

harbours. Stakeholders at the SCH estimate a **shortfall in maintenance funding** of $60m per year.

In the context of diminished funding, the SCH has started a comprehensive review of the SCH model which may change their structure in the longer term. The SCH is constructing a **Viability Index** for grading each harbour (e.g. required recapitalisation costs, usage, condition, profitability, future economic trends in the region) to assess whether the nationally-owned, locally-managed model is viable for all the harbours within its ambit.

Other challenges highlighted by a review of the SCH model included:
- Lack of diversification due to funding challenges – for example, Harbour Authorities cannot afford capital investments and, because they do not own the facilities, cannot borrow on the asset value.
- Dominance of fishermen involved with harbour management has resulted in little focus on economic diversification by Harbour Authorities.
- Government's design and implementation of community management model for harbours was undertaken without the creation of programmes to increase skills and capacity of harbour management volunteers.

4.5 Coastal Resource Management Councils - (Philippines)[30]

In the Philippines, the use of Coastal Resource Management Councils (RMCs) is used to emphasize integrated coastal management involving multi-sectoral collaboration and community participation. The RMCs are established by local government and have legal support through the Local Government Code (1991) and the Fisheries Code (1998). The model is effective in coordination as it allows several municipalities to pool their funds and eliminate boundary disputes.

Banate Bay Resource Management Council was set up in 1995 among 3 municipalities and a Memorandum of Understanding was signed. The Council comprises of 3 mayors, an executive director, heads of operational units, and representatives from municipal legislatures, planning officers, and NGOs.

The Council's activities included the following:
- Preparation of the integrated management plan for the Bay
- Establishment of rules and regulations for preservation of fishery stocks
- Information dispersion
- Organisational support for fishermen cooperatives/associations
- Coordination and interaction with other government agencies.

The outcomes of the Banate Bay RMC included the following:
- Implementation of an integrated zoning plan
- Organisation of a community-based enforcement unit

In addition to these direct results, the Banate Bay RMC also won the Galing Pool Award in 1998 for excellence and innovation in local governance, and was also able to access FAO funding for enterprise development and SME training and deliver the training due to increased capacity and governance in the region.

[30] http://www.worldfishcenter.org/resource_centre/WF_37460.pdf

4.6 Kaipara Harbour (New Zealand)[31]

The Kaipara Harbour region, North of Auckland in New Zealand is a complex area with competing interests involved in the management, development and protection of the region.

The Kaipara Harbour and wider region cuts across political boundaries and is governed by four local government agencies. The central government also has jurisdiction in the region, while the local, indigenous Maori community has also been granted guardianship of the harbour. In addition, environmental NGOs are also involved in the region, given its designation as an important conservation area.

In light of the number of interested parties in the sustainable development of the Kaipara Harbour region, the Integrated Kaipara Harbour Management Group (IKHMG) was established in 2005. The aim of the IKHMG is to promote integrated and coordinated management of the Kaipara Harbour and its environs and it is funded by the Environs Holding Trust – a Trust with the objective of holding the New Zealand government to their agreements on indigenous settlements. The IKHMG is a multi-stakeholder group, comprising indigenous community representatives (hapu), community groups, government and non-government agencies and other stakeholders, the Group play a facilitatory role and does not have executive powers. The model of governance is outlined in the Figure below.

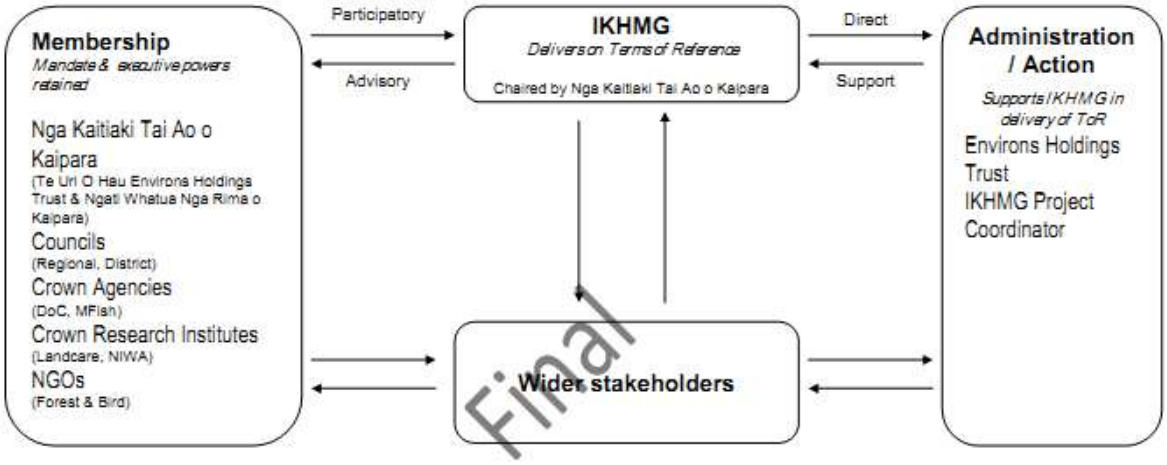


Figure 95: IKHMG governance model

In addition to managing competing interests, the IKHMG also acts in a coordinating role to ensure consistency across statutory planning documents in the region, such as the Regional Policy Statement, Regional Coastal Plans, other land, air and water-based Regional and District Plans.

Plans are afoot for harbour region diversification – with a number of economic opportunities identified for the region, including:

- Food and beverage production
- Tourism
- Infrastructure
- Energy production

[31] Wilson et al (2006) 'Opportunities for Sustainable Economic Development in the Kaipara Harbour Region'

4.7 The Netherlands

Management model

The Netherlands use the so-called Landlord Port management model. In this common management model, infrastructure (particularly terminals) is leased to private operating companies with the port authority retaining ownership of the land. The most common form of lease is a concession agreement where a private company is granted a long term lease in exchange of a rent that is commonly a function of the size of the facility as well as the investment required to build, renovate or expand the terminal. The private operator is also responsible to provide terminal equipment so that operating standards are maintained[32].

Municipalities are the primary responsible institution for harbours. There are three municipality management models:

1. Municipalities manage the harbours themselves (in the case of small harbours) or several small harbours are being managed by one – by other municipalities mandated – municipality.
2. Municipalities create a separate harbour division within the municipality (in the case of medium sized harbours) e.g. the port of Amsterdam belongs to the municipality of Amsterdam under whose instructions the Port of Amsterdam manages, operates and develops the port. The main aim is stimulating economic activity and employment in the entire Amsterdam port region[33].

3. A separate harbour company is created e.g. in the case of the harbour of Rotterdam, the Port of Rotterdam Authority ("**PRA**") is manager, operator and developer of Rotterdam's port and industrial area. PRA is a public limited company with two shareholders: the Municipality of Rotterdam and the Dutch State.

Cost structure

All costs relating to the acquisition of the ground, the realisation and maintenance of the harbour complex (terrain, quays and harbour basins) are being passed on to the customer either via harbour dues (ships) or property lease payments (quay tenants).

The port authority (the harbour authority installed by the municipality) will also be liable for the fixed harbour costs, such as infrastructure. However, the central Dutch government is liable for the main waterways and railways. For the main waterways, no fee needs to be paid by the users thereof.

4.8 EU Fisheries Fund (AXIS 4)

The fund includes an objective under Axis 4 - "*support for diversification*" – and works to improve the linkages between fisheries and other economic sectors. Funds are managed by Fisheries Local Action Groups (FLAGs), which are partnerships between local fishermen and other local stakeholders.

[32] http://people.hofstra.edu/geotrans/eng/ch4en/conc4en/tbl_public_privte_roles_ports.html
[33] http://www.portofamsterdam.nl/Eng/Organisation/Profile-Port-of-Amsterdam.html

There is a focus on a range of diversification areas – starting with activities closely related to fisheries and expanding outwards. Non-fishing related activities can also be promoted as long as it provides alternative employment directly for fishermen and women. The Fund regulation allows for investment in economic activities which "strengthen the competitiveness of fisheries areas".

Project examples are set out below:

Pesca-tourism, FLAG Vla (France)

- A 3-year, €280,000 project with contributions from the FLAG and regional departments.
- Fishermen worked with local and regional authorities and environmental groups to establish safety rules, adapt fishing boats and develop coordinated tourist offers to be promoted in local tourist offices.
- Between 2009 and 2010 a total of 12 boats were equipped and approved for pesca-tourism activities.
- Additional revenue of 30-70% for tourism days where they take of tourists to demonstrate their profession.

Litoral Costa Ebre (Spain)[34]

- A number of fishing organisations in Catalonia produced ice and sold it to the rest of the fishing industry. However, a decline in fishing boats in the region led to a decline in a demand for ice.
- One organisation decided to diversify its ice producing activities and develop new markets. Adapted ice-making equipment to produce ice-cubs for local restaurants and bars.
- Outcome: production of 40 tonnes of ice in 2010 increased turnover of €46,000. Saved 2 jobs.
- Total cost: €190,000 – a combination of private match funding (61%), national/regional co-financing (26%) and EFF (13%)

Orjaku Port (Estonia) 2011-13[35]

- Isolated fishing community supported by EFF to develop the local port to benefit local fishermen and tourism businesses.
- Cooperation between Hiiukala FLAG and the local municipality.
- Three phase project: 1) upgrading of the Orjaku quay, 2) installation of infrastructure for electricity and water; and 3) development of facilities for fishermen and leisure users (storage, refrigeration equipment, storage facilities).
- Total cost: €535,000 – EFF contribution (64%), national co-financing (20%), municipality funding (16%)

Peniche (Portugal)[36]

- Henslow's swimming crabs are often caught by fishermen as a by-catch, but discarded due to limited commercial value.

[34] https://webgate.ec.europa.eu/fpfis/cms/farnet/files/documents/FARNET_GP_023-ES15-EN_Ice-production.pdf
[35] https://webgate.ec.europa.eu/fpfis/cms/farnet/files/documents/FARNET_GP_020-EE04-EN_OrjakuPort.pdf
[36] https://webgate.ec.europa.eu/fpfis/cms/farnet/sites/default/files/documents/FARNET_GP_019-PT04-EN_crab-for-biomedicine.pdf

- Project established to examine biological components, such as chitin and astaxantin, found in the crab shell for use in biomedicine.
- Partnership between the Oeste FLAG, the Polytechnic Institute of Leira, fishermen, bio-medical companies and other research institutes to assess the potential of these crabs as a source of these components and define the extraction process.
- Project still in start-up stages as of January 2012.
- Total cost - € 29,000 with EFF providing (41%), national/regional co-funding (14%) and private funding from the Institute of Leira (45%).

4.9 Key lessons from benchmarking for South Africa

Some of the key lessons that can be drawn from the above benchmarks are as follows:

- Governance and management models can specifically be designed to preserve small scale fishing way of life or promote LED
- There is a trend towards diversification of economic activity, and value chain participation beyond primary sector
- In various models, in particular for smaller, less active harbours, the public sector tends to fund core infrastructure and does not expect to recover this cost from harbours users through user fees
    - This is in recognition of the public good function of these harbours beyond their direct users
- Some approaches have clear criteria to decide when a harbour should be considered a fishing harbour, a multi-use or recreational harbour, or a community harbour
- Depending on capacity and appropriateness, it can be appropriate to devolve management to representative local /community level structures– municipal, communities, or fisher cooperatives
    - However, many of the approaches are still struggling with ongoing funding models in these arrangements
    - For example, where ownership is not devolved, the asset cannot be used to secure funding
    - In the South African context of government asset management through GIAMA and intergovernmental relations, there are also significant constraints to an entity funding an asset if they are not the owner of the asset
- In some cases, the model provides for central support systems, or for clustering management of groups of harbours together
    - This is particularly relevant where they are relatively small, in close proximity and/or located within the same administrative district

5 Market and value chain research

5.1 Overview of the relative scale of value chains and activity within harbours

The table below provides a summary of the scale of priority value chains, the extent to which activity in these value chains takes place in harbours, and estimates of the growth prospects of sectors, with implications of potential increases in demand for use of harbours. The fishing and aquaculture sectors, as would be expected, are very closely tied to the harbours, with the majority of industrial and line fishing activity taking place with the harbours – other locations include Cape Town port and non-designated fishing harbours. On the other extreme, other priority sectors such as fine food and the creative industries have very limited current links with the harbours.

Value chain	Est. turnover or similar measure in W. Cape	Est. # enterprises in W. Cape	Est. employment in W. Cape	Est. % of activity taking place in fishing harbours	Growth prospects
Fishing[37] Industrial Line fish	 ±R3bn ±R750m	2429 rights holders in primary sector	±22,000 ±4,000	±57% (of landings tonnage)	Stable Declining
Aquaculture[38]	±R400m	26	±2,000	±47%	Strong growth
Boatbuilding & repair[39]	±R400 – R800m	±50 - 100	±2,000 – 3,000	Rough est. <30% repair, <10% boatbuilding	Declined during recession, but growth potential
Foods (fine foods as sub-set)[40]	±R23bn agri & food & bev, fine food not known	> 100 in fine foods	-	Very limited, est. < 1%	Growing (agri-food more widely forecast 6 yr avg. growth of 2.3%)
Tourism[41]	±R25bn	-		tbd, v. rough est 20-30% marine-based tourism	Growing 6 yr avg. growth of 3.5%)

[37] DAFF performance reviews 2008, DAFF Ernst&Young fishing harbour study, own calculations based on Fishing Industry Handbook and own research
[38] Own calculations
[39] Own estimates and dti (2012) Scoping study on competitiveness and market development for the South African boatbuilding industry
[40] Western Cape Government (2012) Provincial Economic Review and Outlook; Western Cape Fine Food Initiative
[41] Western Cape Government (2012) Provincial Economic Review and Outlook; Western Cape Tourism Barometer

Value chain	Est. turnover or similar measure in W. Cape	Est. # enterprises in W. Cape	Est. employment in W. Cape	Est. % of activity taking place in fishing harbours	Growth prospects
Crafts[42]	> R100m (2000 data)	>4,600 (incl. production & retail, sole traders & Cos)	± 13,000 -20,000	Very limited, est. < 1%	Growing, (est. 7 to 8% p.a. in 2009)
Other creative industries (film, performing arts etc.) [43]	Film: >R3.5bn (2006)	Film: >100	Performing arts: > 5,000 employed and freelance	Very limited, est. < 1%	Limited local reliable statistics / forecasts available; internationally creative industries often grow at twice avg. GDP grow rate

The sub-sections below consider each of the priority value chains in turn.

5.2 Review of the South African Fishing industry

5.2.1 Introduction

The South African fishing industry, which is primarily based in the Western Cape, is relatively large in global terms with a total production of 673,360 tons (FAO, 2010) worth R4.2 billion in 2008 (DAFF, 2010). There are 2601 rights holders utilising 1788 vessels in 21 different fisheries (DAFF, 2010). The fishery sector is predominantly "industrial" with the hake and small pelagic (sardine, anchovy and redeye) trawl sub-sectors accounting for the bulk of tonnage landed. Other capital intensive fisheries using relatively large vessels include midwater trawl for horse mackerel, prawn trawl, South Coast Rock lobster, Patagonian toothfish, squid and the longline fleet catching species such as tuna, shark, swordfish, hake and kingklip. Smaller vessels are used to catch West Coast rock lobster, linefish, tuna (bait poling) and squid. The major industrial fisheries, which developed from the 1940's to 1980's, can be considered to be mature industries, with well-established processing and marketing infrastructures. Direct employment in the fishing industry is estimated to be 25,000 people (DAFF, 2012). The recreational fishing sub-sector and associated value chain is an important tourism linked activity which has not been economically quantified. The fishing industry contributed 0.07% to South Africa's gross domestic product ("**GDP**") in 2005. Since South Africa's transition to constitutional democracy in the early 1990's, the political imperative to transform the industry to achieve racial representivity through a series of fishing rights reallocations has been the overriding factor shaping the organisation of the sector. Other factors influencing the economy of the fishing industry include resource shifts due to climate change, illegal, unregulated and

[42] TIPS (2009) CCDI Impact Assessment
[43] Cape Film Commission (2011) Draft film sector strategy, W Cape government MEDS study on performing arts

unreported ("**IUU**") fishing, and international market trends such as eco-labelling, a decline in demand for fish from southern Europe, and the growing supply of aquacultured products.

5.2.2 South African Fishery Macroeconomic Data

The data in this section are based on FAO 2010 statistics.

a. General geographic and economic data

Table 33: General geographic and economic data of South Africa

Geographic and economic areas	Data
Water area	(EEZ) 1 071 883 km^2
Shelf area	275 000 km^2
Length of coastline	3 623 km
Population (2009)	49 320 500[4] (Census 2001, 44 819 778)
GDP at purchaser's value (2008)	USD 782.7bn[5]
GDP per head (year)	USD 4 247 at market value
Agricultural GDP (2008)	USD 7.4bn
Fisheries GDP (2008)	USD 322.5mn

b. Fisheries data (2007)

Table 34: Fisheries data 2007

	Production (tonnes/live weight)	Imports (tonnes/liveweight)	Exports (tonnes/liveweight)	Total Supply (tonnes/liveweight)	Per Caput Supply (kg/year)
Fish for direct human consumption	396 660	121 959	144 005	374 614	7.6
Fish for animal feed and other purposes	276 700	41 800	123 400	195 100	

Estimated Employment (2008)	
(i) Primary sector (including aquaculture)	16 853
(ii) Secondary sector	10 876
Value of fisheries imports	USD 233 842 390
Value of fisheries exports	USD 537 912 911

Table 35: Estimated employment (2008)

5.2.3 Institutional and legal environment

The fishing industry operates within a well-defined and relatively robust institutional environment which provides for good governance. The legal framework and institutions flowing from South Africa's constitution provide the basis for a business environment which is conducive to investment and which is relatively free from corruption. South Africa's post-Apartheid fishery reform process, which was based on the MLRA, was in the main successful in achieving racial transformation within the fishery sector while maintaining industrial stability. While South Africa's fishery policies continue to evolve (with the focus in recent years having shifted to support for the small scale fishing sector), the country's legal and judicial system has played a key role in resolving fishing rights disputes. Following a potentially disastrous litigious phase in the 1990's, during which time the Government's fishing rights reallocations processes were successfully challenged by numerous aggrieved parties, a legally robust, long- term fishing rights allocation policy was introduced in 2005 which brought stability to the major industrial sub-sectors. Changes in the organisation of government departments have resulted in fisheries and aquaculture being incorporated into DoA, DAFF, and the marine environmental affairs falling under the Department of Environmental Affairs. The MLRA is thus in urgent need of revision in order accommodate these changes in mandate, as well as a number of other issues requiring legislative provision particularly small scale fisheries, aquaculture, inland fisheries, and recreational fisheries. The expanded mandate of the Fishery Branch will also require a review of the role of fishery stakeholders in fishery governance arrangements as the provisions of the MLRA are inadequate, and DAFF has begun to apply its commodity group model of stakeholder representation to the fishery sector.

Fishing stakeholder groups are well organised into fishing industry associations and interest groups. The industrial fishing sector communicates with government through the recently formed umbrella commodity group, FishSA which recognised by the Minister of DAFF as representative industrial body. South Africa is signatory to, or endorser of key international fishery institutions, regional fishery management organisations as well as conventions governing compliance, fishing in international waters, health, bio security, and sustainability. Fishing industry stability, market access and resource sustainability has however recently been threatened by a series of institutional and organisational failures within DAFF which are elaborated on below.

5.2.4 Fishery resource management

South Africa's fishery resource management arrangements are founded on internationally accepted norms for sustainable resource management and good governance such as the FAO's *Code of Conduct for Responsible Fisheries* and the implementation of an "ecosystem approach to fisheries". The Fishery Branch has possesses well-established research capacity to perform fishery stock assessments which are required to set sustainable harvest levels or total allowable catches ("**TACs**") for each target species. Industry sub-sector representatives participate in Fishery Branch resource management working groups ("**RMWGs**") which formulate recommended management arrangements. In general, the scientific base and organisational arrangements required for the sustainable management of South Africa's fish stocks are adequate. At Ministerial level, there is provision for independent advice through the Consultative Advisory Forum ("**CAF**") however a CAF has not been convened since the late early 2000s which is a concern as the Minister is effectively isolated from objective stakeholder advice outside her Department. South Africa has a well-developed fishery compliance infrastructure although there are ongoing concerns as to the effectiveness of aspects of the Compliance Chief Directorate, with the recent tying-up of patrol vessels being a major concern.

The loss of experienced fishery managers and scientists from the Fisheries Branch over the last decade has resulted in many areas of inefficient or ineffective management, which is a general concern in terms of meeting the resource management goals articulated in the MLRA and associated policies. South Africa's fishery management is often crisis driven and reactive, which renders the institution vulnerable to external forces and shocks (political, environmental, and social).

5.2.5 Political economy

The political economy of South Africa's fishing industry is rooted in the Apartheid era (1940's – 1980's) during which time the major fishery sub-sectors developed. While the industry has always been market driven, financial institutions aligned with the ruling Nationalist Party promoted the establishment of a number of Afrikaner-run fishing companies. Public sector support was provided through the remarkably effective *Fisheries Development Corporation* (*Viskor*) established in the late 1940's for developing fishing industry infrastructure such as fishing harbours. Free market economics and political alignment resulted in the gradual concentration of fishing rights into a small number of corporate groups, particularly in the hake sector. Thus, at the time of South Africa's transition to democracy South Africa's marine fisheries were predominantly mature, capital-intensive industrial fisheries, with ownership concentrated in a relatively small number of white-owned corporations.

The political and economic challenge was how to reform South Africa's fisheries to achieve racial representivity at all levels, as well as to extend the socio-economic benefits of fishery resources to coastal communities. While there were calls for a radical redistributive restructuring, even nationalisation, of the fishing industry, the fundamental industrial structure was retained and racial "transformation" promoted by allowing a number of new black entrants into most sectors. Established fishing companies "transformed internally" to become racially representative through BEE shareholding deals and employment equity practices. This reform processes ultimately substantially achieved the MRLA's goals of equity, stability and sustainability, however, the process was far from perfect with widespread rent-seeking by new entrants, BEE "fronting" by established white-owned companies, and many economic causalities among new rights holders from disadvantaged communities who did not possess the business skills, resource and networks to establish viable fishing enterprises in this highly opportunistic and competitive industry. However, many voices from coastal communities were vocal in asserting that 'equity" had not been achieved because many traditional fishers were not granted fishing rights and little tangible socio-economic benefit had flowed to coastal communities.

A significant policy failure was the design of the MLRA's as a primarily industrial fishing Act, which did not recognise traditional small scale fishing as a distinct class of rights that needed to be managed in a different way. This omission had significant ramifications as small scale fishers fought a rear guard action through activist tactics, political lobbying and through the Equity Court to be recognised in policy and to be allocated a basket of fish resources appropriate to their scale of operation. Implementation of the Small Scale Fishing Policy approved by Cabinet in 2012 remains a challenge as working with fishing communities is essentially a developmental activity for which will require partnerships between national, provincial and local government and civil society stakeholders.

Recreational fishing is a significant generator of tourism and socio-economic benefit in coastal areas which is generally not recognised in fishery policy – which is focussed on the primary

production of seafood commodities. In the light of the shift to tourism based activities in fishing harbours, valuing the socio-economic benefits of recreational fishing becomes more important.

Similarly, whale watching and shark cage diving have become primary activities based on living marine resources which are non-consumptive and which generate significant socio-economic benefit. This needs to be recognised in the re-development of fishing harbours.

5.2.6 Infrastructure

A well-developed fishing industry infrastructure exists in the Western Cape Province comprising of harbours, processing, cold chain distribution, product development, quality assurance, marketing and service industries. Resource shifts away from the West coast combined with the decline of the traditional line fishery has however resulted in the closure or downscaling of a number of regional facilities and a concentration of industrial fishing into the larger ports. This has resulted in a diversification of activities in some of the smaller declared fishing harbours to include recreational boating (fishing, yachting) and tourism activities (restaurants, crafts and eco-tourism boat charters). The redevelopment of harbours thus requires the re-design of space and services to cater for these activities.

5.2.7 Key locations, fishery landings and trends

South Africa's major fishing grounds are located along the continental shelf between Port Elizabeth and St Helena Bay (Figure 3). Consequently, the key fishing ports, processing facilities, and service industries are concentrated in the Western Cape Province. The tonnage of fish caught for each fishery and the main ports where the catches are landed is summarised in Table 6. Outside of Western Cape, the only significant fishery activity occurs in the Eastern Cape (Port Elizabeth and Port St Francis) where the squid fishery is based and a small proportion of South Africa's sardine, inshore trawl and linefish catch are landed.

The scale of the fishing sub-sectors varies considerably in terms of production, value employment and locality. While the hake fishery is South Africa's most valuable resource and a significant employer, the only fishing harbour that plays a significant role is Saldanha Bay. The small pelagic fishery is the largest in terms of tonnage and second largest in terms of value, employing over 5000 people. The industry is based at five fishing harbours and thus effective management of these assets is vital to the pelagic industry. The West coast rock lobster fishery generates significant value and employment and utilises three fishing harbours. A new fishery which is still developing is the tuna bait and pole fishery. Hout Bay is a key harbour serving this fishery which requires upgrading of its services and facilities in order for the fishery to develop. The linefishery utilises all fishing harbours, and is a significant employer particularly for traditional fishing communities. However there have been significant declines in line fishing activity at many fishing harbours in recent years, creating space for alternative harbour activities. Aquaculture is a significant growth industry which is now comparable to the medium size fishing sectors in terms value and employment.

Resource declines and shifts (possibly linked to climate change) as well as economic factors have resulted in the closure of fishing operations in a number of regional ports and the concentration of fishing industry services around the Cape Town/Saldanha industrial hubs. For example, the decline of the rock lobster fishery along the traditional West coast fishing grounds resulted in the closure of the processing operations at Hondeklipbaai and Lamberts Bay, and a dramatic reduction in landings at Port Nolloth. The historic John Ovenstone factory at Port Nolloth which employed over 100 people up to the mid-1990's closed following the transfer of

hake quota to Cape Town/ Saldanha Bay due to the lower operational costs of being in close proximity to the service industry. In recent years, South Africa's largest fishing company Irvin & Johnson closed regional fish factories serving inshore trawl operations in Port Elizabeth and Mossel Bay. Technological innovations over the years such as on-board fishing processing and freezing of demersal fish also contributed to the scaling back of shore based operations. The decline of the traditional linefish resource, which was declared to be in a state of crisis in 2000, has led to a decline in activity in a number of regional fishing harbours (Hout Bay, Kalk Bay, Gordon's Bay, and Hermanus).

Most of the existing pelagic fish processing factories producing tinned sardines and fishmeal date back to the 1950's, and two major operations closed in Saldanha Bay in recent years. Pelagic fish processing is now mainly based at the fishing harbours of Laaiplek/St Helena, Hout Bay and Gansbaai.

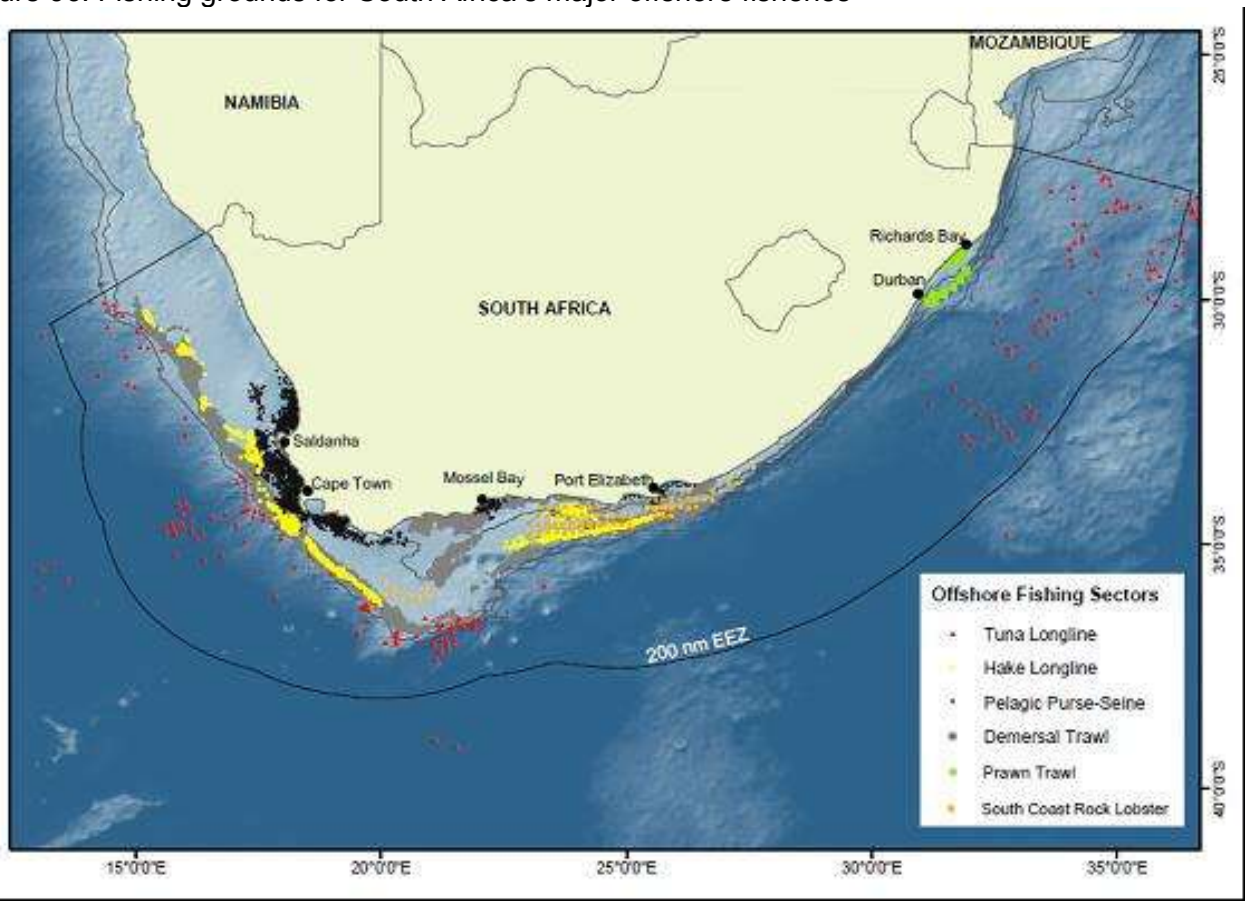
Cape Town harbour and Saldanha Bay are the two major ports where "deepwater" demersal fish processing fishing and the fishing-related service industry is based. Demersal fish comprising mainly of hake, but also by-catch such as kingklip and monkfish, are landed by stern trawlers at major factories located in Cape Town and Saldanha Bay and processed into various products e.g. head and gutted, fillets, value added products. Demersal fishing, as well as mid-water trawling for horse mackerel, utilise relatively large vessels which require a proper port infrastructure and service facilities such as workshops, dry docks, and cold chain freight logistics. Cape Town is also the major provisioning port for high-seas tuna vessels.

Fishery related services, predominantly Cape Town based, include vessel and fishing equipment, packaging, electronics, engineering, clothing, chemicals, bunker services, diving services, cold storage, consultancy services - to name a few (Fishing Industry Handbook, 2011). South Africa is a well-established fish exporter with the necessary infrastructure and service sector including HACCP processing, and EU accredited product health standards (administered by the NCRS - National Regulator of Compulsory Standards).

The smaller active fishing harbours and landing points include Port Nolloth (rock lobster) on the west coast, then moving to the South and East, Hondeklip, Lamberts Bay, Elands Bay (rock lobster and linefish), Laaiplek/St Helena (small pelagic, snoek and lobster), Yserfontein (snoek, lobster), Hout Bay harbour (small pelagics, rock lobster, recreational tuna, eco-tourism charter), Buffels Bay (snoek), Kalk Bay harbour (rock lobster and linefish), Gordon's Bay (recreational fishing and lobster), Kleinmond (snoek), Gansbaai (small pelagic and fishmeal processing), Hermanus (whale watching), Struisbaai (linefish) and Stilbaai (linefish).

Large fishing vessels (e.g. demersal and mid-water trawl) are not constructed in South Africa, but are typically purchased second-hand from northern hemisphere nations where the purchase of new fishing vessels is subsidised. Smaller fishing vessels such as those used in the small pelagic, squid, and linefish sectors are manufactured in South Africa by manufacturers such as Sachal and Stevens in Vredenburg and Lee Cat in the Eastern Cape Province. One fishing boat manufacturer (Talley Marine) on the West coast recently suspended operations due to a drop in sales following the conclusion of the long term fishing rights allocation process.

Figure 96: Fishing grounds for South Africa's major offshore fisheries



Note the concentration of the major fisheries, particularly demersal trawl and pelagic purse seine, in the Western Cape Province. The major fishing harbour industry infrastructure is thus located around the port hubs of Cape Town and Saldanha, serving fishing harbours and processing facilities between Gansbaai in the East and St Helena Bay in the West. Source FAO, 2010.

Table 36: Offshore fishery landing and associated ports (FAO, 2010)

Target Species	Annual Catch	Gear / Fishery	Main Bycatch	Main Ports in Priority
Cape Hake	Hake : TAC 2009 = 119 000 tonnes Catch 2008 = 126 000 tonnes Sole TAC 2009 = 871 tonnes	Bottom trawl, longline, hand line	kingklip, monk, snoek, dory, horse mackerel, sole	1. Cape Town 2. Saldanha 3. Mossel Bay 4. Port Elizabeth 5. Gansbaai
Sardine	Sardine TAC 2009 = 90 000 tonnes Catch 2008 – 126 000 tonnes	Purse seine	Anchovy, red eye pilchard and juvenile horse mackerel	1. St Helena Bay 2. Saldanha 3. Hout Bay 4. Gansbaai 5. Mossel Bay
Anchovy	Anchovy TAC 2009 – 569 000 tonnes Catch 2008 ~ 400 000 tonnes	Purse seine	Sardine, red-eye pilchard and juvenile horse mackerel	6. St. Helena Bay 7. Saldanha 8. Hout Bay 9. Gansbaai
Horse Mackerel	Precautionary Catch Limit 2009 = 48 000 tonnes	Midwater Trawl	Ribbon fish	1.Cape Town 2 Port Elizabeth
West Coast	TAC 2007 = 2 895 tonnes	Traps and hoops	Nil	1. Hout Bay

Rock lobster				2. Kalk Bay 3. St. Helena
South Coast Rock Lobster	TAC 2009 - 733 tonnes (whole mass)	Bottom set traps	Minor – Octopus in traps	1. Cape Town 2. Port Elizabeth
Squid	4 -8000 tonnes annually 2008 Catch = 4 500 tonnes	Jig with deck boats TAE managed	Nil	1.Port Elizabeth 2. Port St. Francis
Shrimp	44 tonnes (2007)	TAE- Managed	Slipper lobster, linefish	1.Durban 2.Richards Bay
Tuna Bait and Pole	Albacore Catch (2007) = 3582 tonnes Yellowfin Catch (2007) = 19.1 t	Pole and line	Yellowfin Tuna Bigeye tuna Shark Yellowtail	1.Cape Town 2.Saldanha
Large Pelagic	Yellowfin Tuna (2007) = 958 tonnes Bigeye Tuna (2007) = 571tonnes Swordfish (2007) = 388tonnes Shark (2007) = 753 tonnes	Pelagic Longline	Albacore Tuna Mako Shark Blue Shark	1.Cape Town 2.Durban 3.Richards Bay 4.Port Elizabeth
Linefish (2007 Catch est.)	Snoek = 2 741 tonnes Cob = 312 tonnes Geelbek = 426 tonnes Yellow Tail = 461 tonnes	Hand line	Shark Other linefish	All ports, harbours and beaches around the coast

5.2.8 Industry issues, trends and strengths

a. Economic performance

DAFF 2009/10 "Performance Review of Fishing Rights Holders" indicated that the "full commercial" sector[44] generated catch sales generated R4.2billion, with the highest from hake deep sea trawl (R1.97billion) and followed by the small pelagic subsector (R911mn) (Table 2.1). The average income to rights holders per ton of fish sold was R19, 454 per ton or R19.45 per kg. In the limited commercial sector, traditional linefish has the highest total turnover of R66.79m, followed by West coast rock lobster at R42.99mn. Netfish reported the lowest turnover, with R3.25m. West Coast Rock Lobster is the only sector where turnover has increased despite a dip in catch (DAFF, 2012). Total profit across all sectors was estimated to be R568m, with the average rights holder generating R376,785 in profit. The average total investment in the sector was R192mn. The total wage bill amounted to R2.5 billion, with the highest average daily wage paid to employees in Horse Mackerel.

[44] Hake deep sea trawl, hake long line, hake inshore trawl, KZN prawn trawl, horse mackerel, sea weed, squid, Patagonian toothfish, West coast rock lobster, South Coast rock lobster, demersal shark, small pelagics and tuna pole.

Table 37: Economic indicators for the full commercial fishing sector for 2008

Source: DAFF, 2012

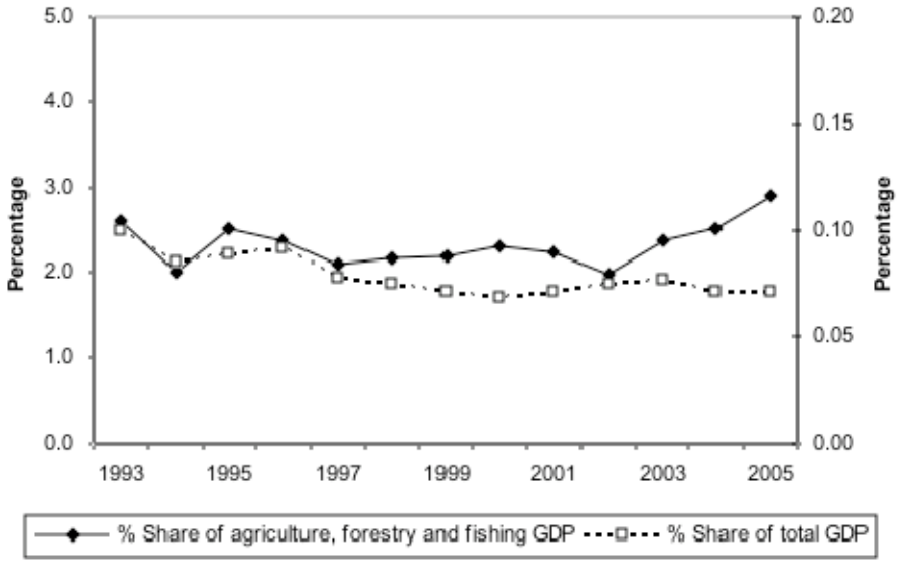
Economics (2008)	All	HDST	HLL	HIST	KPT	HM	SW
Total catch sales**	R 4 201 747 348.00	R1 977 796 033.00	R127 386 254.00	R 95 955 281.00	R 6 566 910.00	R 122 170 825.00	R9 600 958.00
Total profit *	R 558 019 587.43	R 72 041 811.00	R 8 737 054.75	R 16 156 352.00	N/A	R -5 433 683.00	R 220 917.00
Average profit *	R 376 785.68	R 1 412 584.53	R 59 435.75	R 414 265.44	N/A	R -603 742.56	R 18 409.75
Sales per ton**	R 19 454.24	R 44 746.25	R 20 614.05	R 114 037.67	R 33 779.70	R 5 440.00	R -
Total no. of vessels	605	65	33	20	3	7	2
Average no. of vessels per RH	1.56	1.28	1.29	2.063	1.5	1.73	1.2
Average no. of RHs per vessel	1.07	1.5	2.32	1.22	1	1.36	1
Average total investment	R192 389 030.00	R3 020 919 329.00	R1 690 210.00	R 700 193 153.00	R6 269 809.00	R14 441 535.00	R677 150.00
Total no. of employees	22105	5917	1482	642	80	1593	78
Total Wage Bill	R2 551 282 300.00	R 765 895 613.00	R 55 855 365.00	R 970 543 082.00	R3 565 065.00	R63 524 954.00	R 2 339 966.00
Average no. of employees	25.5	118.33	10.97	37.76	20	124.57	13
Average Total Wage Bill	R 2 942 655.00	R 15 317 912.00	R 413 747.00	R 57 090 770.00	R891 266.00	R3 970 310.00	R389 994.00
Average Daily Wage	R 1 613.25	R 1 327.00	R 928.85	R2 399.00	R 619.44	R 2 908.16	R 503.86

Economics (2008)	SQ	PT	WCRL	SCRL	DS	SP	TP
Total catch sales	R391 568 702.00	R 5 997 919.00	R 390 034 693.00	R 84 260 660.00	R5 153 441.00	R 911 577 829.00	R79 268 802.00
Total profit	R 72 843 518.00	R 25 568.00	R 55 501 509.39	R 16 930 042.00	N/A	R 317 789 577.01	R 3 206 921.28
Average profit	R 269 790.81	R 8 522.67	R 125 003.40	R 806 192.48	N/A	R 2 737 627.37	R 8 714.46
Sales per ton	R 62 590.24	R 478 417.42	R 586 163.57	R 1 110 080.50	R 121 787.88	R 6 853.04	R 54 110.90
Total no. of vessels	116	4	93	11	10	102	139
Average no. of vessels per RH	1.28	1	1.33	2	1.33	2.86	1.06
Average no. of RHs per vessel	1.12	1.67	2.63	1.83	1	2.81	1.01
Average total investment	R 4 573 892.00	R5 750 000.00	R 1 411 140.00	R 3 637 606.00	R2 814 911.00	R 19 833 260.00	R 1 575 751.00
Total no. of employees	2998	77	1221	190	93	5204	2131
Total Wage Bill	R157 568 874.00	R6 006 774.00	R 67 606 314.00	R16 926 918.00	R2 954 058.00	R 401 098 384.00	R 37 386 434.00
Average no. of employees	25.85	15.4	5.55	14.62	15.5	47.74	12.54
Average Total Wage Bill	R 1 358 352.00	R1 201 355.00	R 307 301.00	R 1 302 071.00	R494 010.00	R 3 679 802.00	R 219 920.00
Average Daily Wage	R 1 247.92	R1 279.85	R 1 466.74	R 923.51	R1 045.57	R 627.69	R 1 243.74

b. Contribution to national and provincial economy

Hara *et al* (2009) estimated that in 2005 the primary sector component of fishing contributed just over R1bn to the South African economy, which was approximately 3% of non-mining primary sector GDP and 5% of the coastal economies GDP. The contribution of fishing to the overall national economy fell from about 0.1% to 0.07% between 1993 and 2005 (Figure 4).

Figure 97: Contribution of fishing to GDP



Source: Hara et al, 2009

In the Western Cape the fisheries sector contributes approximately 2% to the Western Cape gross geographic product ("**GGP**"), and are the third most important export product after fruit and liquor (DAFF, 2010).

c. Imports and exports

South Africa exports double the amount of fish that it imports; however, there is a trend of increasing imports reflecting the increased popularity of fish products, as well as the increasingly short supply of traditional fish products such as hake and linefish on domestic markets (Hara *et al*., 2009). Fish and seafood products comprised almost 6 % of total exports in the Western Cape (Table, 2.3, Hara *et al*., 2009).

Table 38: Major Western Cape fishing exports, 2007. Source: Hara et al 2009.

Products	Export value(R m)	Share of fish exports	Main trading partner
Other fish fillets	591.3	21.3%	Australia
Fish fresh or chilled, whole	339.6	12.2%	Spain
Rock lobster and other sea crayfish, not frozen	278.3	10.0%	Hong Kong
Rock lobster and other sea crayfish, frozen	249.1	9.0%	United States
Cuttlefish and squid,	224.3	8.1%	Spain

frozen, dried, salted or in Brine			
Other fishing exports	1093.9	39.4%	Spain
Total Fish and Seafood Exports	2 77 .5	100.0%	United Kingdom
Total WC Exports	47 987.	5.8%	

d. Employment

Reported direct total employment in the South African fishery sector was approximately 25,000 people in 2008, a 16% decrease from 2000 figure of around 30,000 jobs (Table 7). Employment in the hake based fisheries declined by 17% (1754 jobs), while increased employment was reported in the small pelagic, horse mackerel, squid, tuna pole, and aquaculture sub-sectors. Decreased employment was reported in the prawn trawl, Patagonian toothfish, West coast rock lobster, South coast rock lobster, demersal shark, abalone, and linefish sectors. Of concern is the noticeable loss of jobs in small-scale fishery employment in the linefish (-1346), west coast rock lobster (-1618), hake hand line (-673), and abalone (-952), and seaweed (-1372) sectors which is linked to resource decline and economic non-viability. This is reflected in decreased activity in the smaller fishing harbours documented in the following section of the report. The Western Cape Province accounts for 71% of employment in the fishing industry (Mather *et al*., 2003).

Table 39: Employment in the fishing industry in 2000 and 2008

Fishery	Catching operations ('00)	Processing ('00)	Total ('00)	Total ('08)
Hake - Total	5306	4798	10104	8350
Hake- deep sea trawl	2774			5917
Hake - long line	977			1482
Hake - inshore trawl	573			642
Hake - hand line	982			309
Prawn trawl KZN	142	56	198	80
Horse mackerel			90	1993
Seaweed			1450	78
Squid	2004	114	2118	2998
Patagonian toothfish	152		152	77
West coast rock lobster	1575	1326	2901	1283
South coast rock lobster	218		218	190
Demersal shark	172	120	292	93
Small pelagic	800	3684	4484	5204
Tuna pole	1600		1600	2131
Large pelagics	367	335	702	500[3]
Linefish	3133	718	3851	2505
Abalone	1384	60	1444	492
Aquaculture - marine			680	1234
Totals	**16853**	**11211**	**30,284**	**25,482**

Note: Based on the Economic and Sectoral Survey of the South Africa Fishing Industry (Mather *el al,* 2003; Sauer *et al*, 2003) the Performance Reviews of fishing rights holders conducted by Department of Agriculture, Forestry and Fisheries (DAFF, 2012). Other data sources are specified by footnotes. The comparison assumes that both surveys captured all fishing industry employment, but closer examination of the survey methodologies is required to validate this.

1. Based on number of rights holders in 2008 (302) and an estimate of abalone processing factory employment (G. Groenewald, SPP Canning, personal communication, June 2012)

2. Britz *et al*. 2009.
3. Estimate by C.Smith, Pelagic and High Seas Fisheries Management, Department of Agriculture, Forestry and Fisheries; Branch: Fisheries Management, June 2012. Excludes foreign crew.

The Economic and Sectoral Survey of the fishing industry revealed that skills levels in the fishing industry are higher than many primary sector jobs and that average wages are higher (Mather *et al*., 2003). The larger industrial fisheries (e.g. deep sea trawl, small pelagics) paid better wages and provided better benefits (e.g. training, higher skilled employment, pension and medical funds) than the small scale fisheries (e.g. linefish, squid). The majority of those employed in the primary sector (including onshore support) are in the skilled or semi-skilled category. In the secondary and tertiary sector, the majority of those employed are semi-skilled (68.5%) or unskilled (22%).

e. Scale of fishing and aquaculture sector operations

The scale of the fishing and aquaculture sub-sectors varies considerably in terms of production, value employment and locality. While the hake fishery is South Africa's most valuable resource and a significant employer, the only fishing harbour that plays a significant role is Saldanha Bay. The small pelagic fishery is the largest in terms of tonnage and second largest in terms of value, employing over 5000 people. The industry is based at five fishing harbours and thus effective management of these assets is vital to the pelagic industry. The West coast rock lobster fishery generates significant value and employment and utilises three fishing harbours. A new fishery which is still developing is the tuna bait and pole fishery. Hout Bay is a key harbour serving this fishery which requires upgrading of its services and facilities in order for the fishery to develop. The linefishery utilises all fishing harbours, and is a significant employer particularly for traditional fishing communities. However there have been significant declines in line fishing activity at many fishing harbours in recent years, creating space for alternative harbour activities. Aquaculture is a significant growth industry which is now comparable to the medium size fishing sectors in terms value and employment.

f. Transformation

The South African fishing rights reform process can be considered successful in achieving transformation of the fishing industry in terms of racial representivity. The majority (60%) of rights holders surveyed agreed that the Long Term Right Allocation Management Process had been successful in transforming the demographics of the fishing industry (DAFF, 2012). Rights holders in the full commercial fisheries were 64% black, and in the limited commercial sector 72% black. The average percentage of black directors across all sectors was 63% - a dramatic increase from the 2004 average of 11%. The top salary earners were on average, 49% black. In terms of BBBEE scores, 13% were levels 1-3, 56% were level 4, and 25% level 5 (DAFF, 2012). Total employment in the fishing industry in 2000 was 89.1% black (Mather *et al.,* 2003). However, issues of equity in terms of access to resources still remain in terms of traditional fishing communities, and the present challenge is the definition of strategies to implement the small scale fishing policy. Addressing instances market failure and providing access to value chains for small scale fishers beyond primary production will be key strategies.

g. MSC certification of hake

The South African deep-sea hake trawl sectors efforts to obtain Marine Stewardship Council ("**MSC**") certification have yielded large economic dividends in recent years. The global economic recession led to a decline in demand for fresh hake in the Spanish market in 2009, which has largely been offset by increased sales of processed frozen hake into the northern European market which demands MSC certification.

h. IUU fishing (Poaching)

The growing prevalence of IUU fishing in South African fisheries, although poorly documented, is a growing concern which threatens the sustainability of the resource and undermines the fisheries governance institutions and management protocols. Outright illegal harvesting of resources such as abalone, rock lobster and are widespread and threaten the viability of the legal fisheries. More subtle, and perhaps more of a threat to the economic performance of the sector, is "quota overfishing" whereby permitted vessels take more than their quota allocation of fish. Related problems are fishing in marine protected areas and "highgrading" whereby unwanted small fish and "bycatch" are discarded to allow fishing vessels to target a greater portion of desirable sized fish. The recent administrative problems within DAFF which have resulted in the suspension of the vessel observer programme and tying up of patrol vessels opens the door for widespread bad behaviour in the fishing industry. Furthermore, the poor maintenance DAFF's data bases and integration of compliance related data (such as vessel monitoring systems) into research databases constrains effective fleet management.

IUU fishing or "poaching" is a major threat to the sustainability of South Africa's fisheries, and the equitable distribution of socio-economic benefits to coastal communities. Urgent steps to address the underlying fishery governance and administration are required to reverse the problem.

i. Recreational fishery and marine tourism

As South Africa's major fisheries are maximally exploited, and the traditional linefishery has declined, recreational fishing and marine based tourism such as whale watching and shark cage diving offer important new opportunities to enhance the socio-economic benefits of marine living resources.

To date the recreational fishery has not been included in policy to promote optimal socio-economic benefit from the fishery sector; however, its economic impact as part the tourism value chain is significant in coastal areas. South Africa's recreational fishing sector is substantial as its economy includes direct fishing activity and all the associated downstream industries such as bait and tackle, boat construction and maintenance, and accommodation. Many lifestyle decisions to buy coastal property (e.g. marinas) are linked to recreational fishing. The main recreational sectors include:

- Rod and line (beaches and estuaries);
- Ski-boat (small harbours and beach launches) – linefish species including tuna;
- Recreational diving – spearfishing and west coast and rock lobster; and
- Recreational hoop nets for west coast rock lobster (257 tonnes allocated for 2009/10).

In the absence of robust data and a policy on the socio-economic benefits of recreational fishing, commercial or small-scale fishing for livelihoods has been favoured over the recreational sector, which has resulted in the closure (abalone) or scaling back (rock lobster) of certain recreational fisheries. Anecdotal evidence suggests that the closure of recreational abalone fishing combined with the dive ban at Gansbaai has led to a drop in demand for property in the area.

Using various sources, Hara et al (2009) is estimated that the marine recreational fishery was worth over R2bn per annum in 1997 prices with the number or participants estimated to be between 500,000 and 750,000 (Table 8). The majority of the value was derived from shore angling (68%), followed by estuarine (23%), boat-based fishing (6%) and spear fishing (3%).

	Estuarine anglers	Shore anglers	Boat-based	Spear fishers	Total[1]	Total (1995)[2]
Participants, 1994–1996	72 000	412 000	12 054	7 000	503 054	750 000
Annual catch, tonnes	n/a	2 836	1 460	214	4 510	17 000 min
Annual catch, tonnes		3 173	1 283	123	4 579	
Employment	n/a	99 180	7 680		106 860	
Economic value, R m	n/a	1 653	128		1 781	750
Economic value, 1997, R m	470	1 383	128	54	2 035	

Table 40: Economic data for estuarine, shore, boat and spear recreational fishers. From Hara et al, 2009

Whale watching and shark cage diving operations have boomed in coastal towns such as Hermanus, Gansbaai and Plettenberg Bay. In contrast to recreational fishing, these activities have been promoted by the fishery management authority as a socio-economic alternative for small-scale fishers and members of coastal communities who were not awarded fishing rights, but with limited success due to the capability limitations (education, business skills, networks, language and culture) of individuals in these communities.

Potential impact of draft Small Scale Fishing Policy on fishing activity

The decade-long development of a small-scale fishing policy, culminating in its Cabinet approval in 2012 represented a victory for small scale traditional fishers who had fought a long political and legal battle. The process has been fraught with controversy and confusion, stemming in part from poor management of the policy making and rights allocation process by the Fishery Branch. At the time of writing clarity is still required on key aspects such as definition of community and which existing commercial fishing rights will be affected. Nonetheless, the policy does offer hope for small-scale fishers to develop viable enterprises provided the requisite developmental support is provided.

A key difference between the commercial fisheries (which are operated by empowered firms with access to capital, infrastructure, skills and markets) and the small scale fisheries is that the target beneficiaries of small scale fishing are largely previously disadvantaged members of coastal communities who do not have the capability to take advantage of the opportunities being offered without significant developmental assistance. As DAFF has historically limited its intervention to achieve equity in the fishery sector to the allocation of fishing rights, small-scale fishers have naturally relied on established commercial firms to catch and process their allocated quota. This has led to wide spread rent-seeking (paper quotas) and catching agreements that limit small scale fisher participation to the primary fishing operation where they are “price takers” dependent on what processors offer for their fish.

If developmental support were provided, small scale fishers could be empowered to participate through the value chain from the catching operation to the retail side, and in that way captures more value from the relatively small amount of fish that they land. To achieve this, identification of market niches (e.g. the tourism value chain) and strategies (e.g. geographical name branding and product promotion) which could add value to their catch need to be identified. To render this developmental support, appropriate institutional arrangements will need to be formulated with appropriate service providers and public sector funding.

Fishing harbours could play a key role in such development support as localities for premises for landing, processing, and retailing fish, particularly into the tourism sector which is inclined to support traditional/ cultural activities which benefit local communities.

5.2.9 Major fishery value chains

South Africa's fishing sector is a mature industry with well-established value chains. The sector is dominated by "industrial" fisheries producing a variety of products ranging from fishmeal for the animal feed industry, to well-known supermarket brands of frozen hake and tinned pilchards, to live lobster for export. The industrial fisheries are characterised by vertical integration with the major fishing companies catching, processing, distributing and marketing well-known brands. This transaction cost, makes the supply chain more efficient, and captures significantly more value for the firms. In the industrial fishery additional fish may be bought in from other rights holders through various forms of catching agreement, the purchase of landed fish or processing agreement. In small-scale fisheries such as the line fishery, inshore rock lobster, and abalone, harvesting is generally carried out by the individual fishing rights holders and the catch either sold into the industrial fishery value chains, or marketed directly by "langanas" (traditional fish merchants) to the community. An overview of the South African fishing industry and current value chain trends is presented in Volume 1 of the present report.

In this section, a synopsis of the value chains for the major fisheries is presented, followed by a summary of value chain opportunities which could be used to develop economic opportunities linked to fishing harbours.

a. The pelagic fishery value chain

South Africa is a major producer of pelagic fish with a total annual catch in the region of 500,000-600,000t. The main products are fishmeal and fish oil for the animal feed industry and tinned and frozen pilchards for human consumption and bait. Most of the existing pelagic fish processing factories date back to the 1950's. Pelagic fish processing is now mainly based at the fishing harbours of Laaiplek/St Helena, Hout Bay and Gansbaai. Most pelagic fishing companies operate vertically integrated catching, processing, distribution and marketing operations. In the case of tinned pilchards they sell their branded products directly to supermarket chains or wholesalers. Fishmeal is sold as a commodity to buyers in the animal feed industry. A smaller but growing proportion of pilchards is frozen for sale as bait (mainly by smaller operators) or for human consumption.

Figure 98: Pelagic fish processing

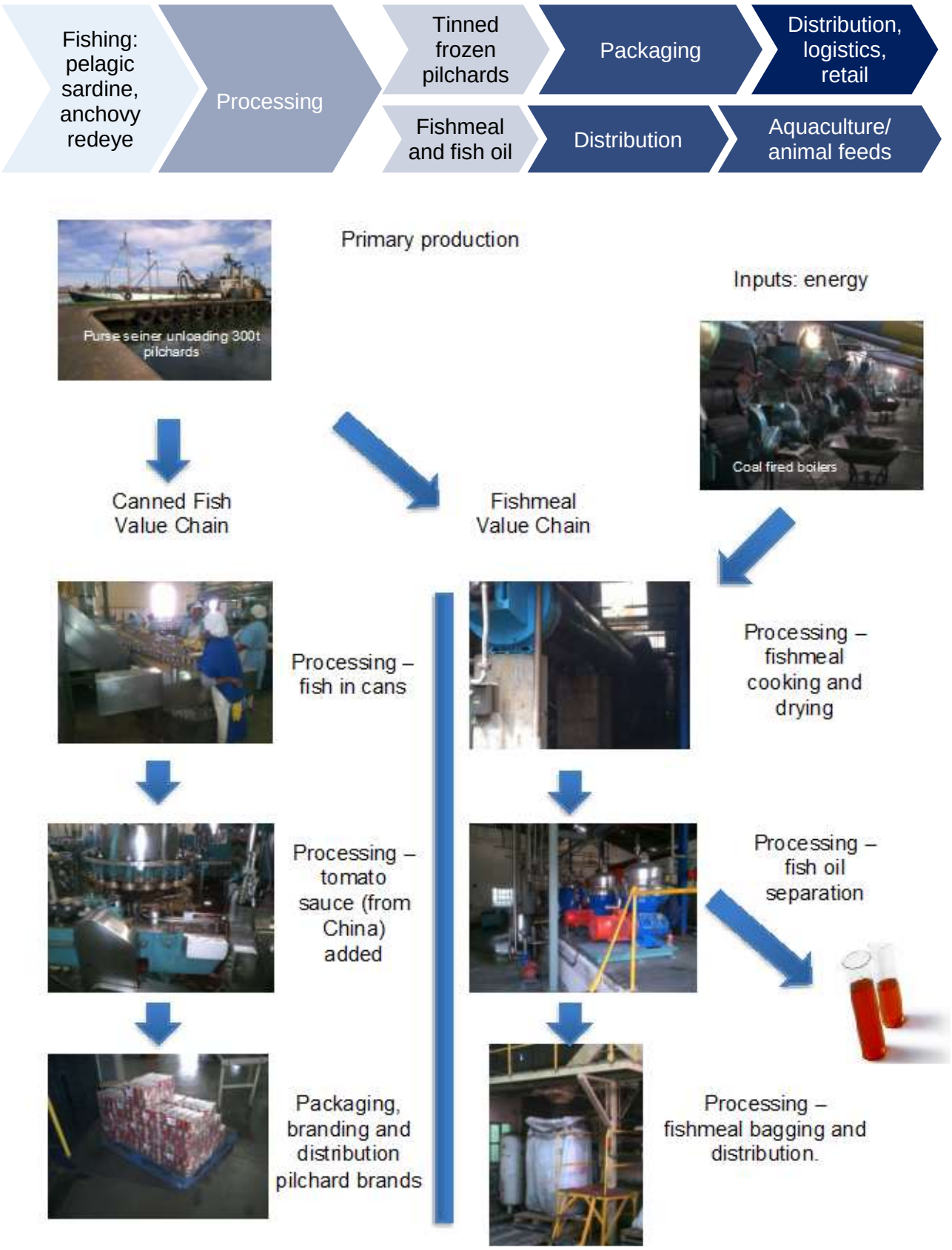


Figure 99: The pelagic fishery value chains

Sources of value add

For pelagic fish destined for human or pet consumption, value addition occurs through the production of very well established products sold as trusted brands. These include:

- Tinned plain sardines in oil e.g. "*Saldanha*" brand.
- Canned pilchards with tomato and/or chilli sauces e.g. *Glenryck, Lucky Star* brands
- Fishpaste spreads. E.g. *Redro* brand.
- Pet food e.g."*Lucky Pet*" minced pilchards.

Very little speciality value adding occurs in the pelagic fishery, for example, the making of traditional "Mediterranean" type products such a preserved and salted sardines and anchovies and this presents a niche opportunity for SME's.

Fishmeal and fish oil are commodities in global demand for use in the animal feed industry, particularly for fish feeds. Quality is an important price determinant of fishmeal, with "low temperature" processed fishmeal attracting premium prices due to its high digestibility and low incidence of anti-nutritional factors such as histamine. The technology used in South African fishmeal plants lags behind that employed in the larger fishmeal producing countries as the fish volumes do not justify the large capital investment required to upgrade the existing fishmeal plants. This, however, might change as the global price for fishmeal increases and there is more incentive to invest in capital.

With the global move to sustainable fisheries, market demand for fishmeal from sustainable certified fisheries is increasing and thus sustainable fishery certification generates a price premium. It can be argued that the use of fishmeal in aquaculture feeds is a form of "value adding" as cheap pelagic fish is converted into high value aquacultured fish. There is a global initiative to produce more cultured fish from a lesser quantity of wild fish as the fishmeal supply is limited and there are sustainability concerns around pelagic fish stocks. The current benchmark the aquaculture industry is striving for is that at least 1kg of cultured fish should be produced from 1kg wild pelagic fish.

There is a global move to encourage increased human consumption of small pelagics. An increasing proportion of pilchards are being frozen, mainly for sale as bait. There is however scope to increase human consumption of frozen pilchards with the growing awareness of seafood and public willingness to consume more diverse seafoods. Similarly, the processing of large anchovies in a Mediterranean style could provide labour intensive SME opportunities provided catching operations were adapted to accommodate this requirement.

Product	Canned pilchards	Frozen pilchards	Fishmeal	Fish oil
Branding	✓			
Labelling and certification			✓	✓
Market relationships/ access		✓		
Quality	✓		✓	✓

Locational requirements

Pelagic fishing operations and landing points are determined by fish movement. The bulk of pelagic tonnage is landed at St Helena/Laaiplek, Hout Bay and Gansbaai. Processing factories are located at fish landing points due to the perishable nature of fish. A sardine resource shift to the East coast has led to increased landings at St Francis Bay and Port Elizabeth processed into frozen pilchards. Fishmeal is a global commodity and is exported to major aquaculture producing

countries. Canned pilchards are distributed mainly in the SADC region. Frozen pilchard is retailed mainly in coastal areas of RSA for bait.

Role of fishing harbours

Fishing harbours are essential access points to the sea and fish stocks and sites for processing. Current re-investment into fishmeal processing is focussed on Saldanha and St Helena Bay

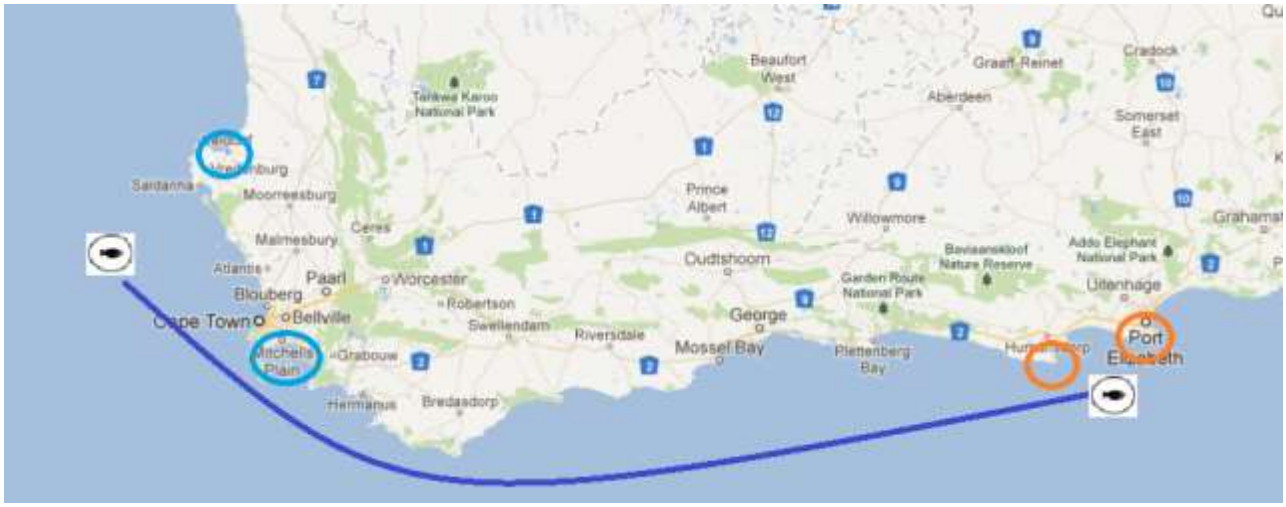


Figure 100: Sardine shift to East coast and increased St. Francis Bay & PE landings

highlighting the need to strengthen the harbour management and services to these industrial fishing hubs. Hout Bay, Laaiplek and Gansbaai will remain important pelagic fish processing harbours. Harbour facility upgrading and integrated management of non-industrial harbour linked usage (tourism and residential development) is urgently required.

Constraints to pelagic fishing industry development

- Ageing fishmeal plants – low fish volumes constrain capital investment in new plant
- Conflicts with non-industrial harbour neighbours over fishmeal smell and poor integrated planning
- Poor harbour maintenance and management
- Under-catching of the Total Allowable Catch

Pelagic fishery value chain enhancement opportunities

- Better quality fishmeal from investment in modern processing technology
- Improved energy efficiency from investment in modern processing technology
- Certification of fishmeal and fish oil as originating from a “sustainable fishery”
- Increased use of fresh and frozen sardines for human consumption
- Processing of anchovy and fresh small pelagics for human consumption and SME development

b. The demersal trawl fishery value chain

South Africa supports a major demersal trawling fishery value chain based on an annual catch of around 130,000t of hake and by catch. Cape Town harbour and Saldanha Bay are the two major ports where "deepwater" demersal fish processing and the fishing- related service industry is based. Demersal fish comprising mainly hake, but also high-value by-catch such as kingklip and monkfish, are either processed entirely and flash frozen as fillets on large factory ships at sea, or are landed by stern trawlers (about two-thirds of the catch) and processed into various products e.g. head on and gutted, fillets, value-added products. Offal from the processing operations is processed into fishmeal. The demersal trawl industry value chain is vertically integrated with the major rights holders operating their catching operations according to national and international market demand for various products, including major supermarket brands that they own. The vertical integration makes the value chain more efficient, lowering transaction costs and significantly adding to the rent that is generated by the value chain.

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Figure 101: Demersal fish processing fishing and fishing related service industry in Cape Town & Saldanha

Sources of value add

The pioneer companies in the South African hake fishery were highly successful in adding value to what was originally a low valued product sold as "stock fish". Through the establishment of branded hake products and a cold chain distribution network, companies such as Irvin and Johnson and Sea Harvest added considerable value to these fish resources. Capital investment into mechanization further increased the profitability of the operations. The vertical integration of harvesting, processing and marketing has been highly successful and the processing operations are major employers in Saldanha and Cape Town.

The most valuable products from the hake fishery are fresh hake and frozen hakes fillets, however, a wide variety of value-added products are produced including:

- Fish fingers
- Ready to eat hake meals in sauces
- Battered or breaded fish products
- Moulded fillets
- Smoked or 'haddock' fillets

For over a decade South Africa added significant value to its hake by exporting fresh "PQ" hake to Spain by air where premium prices were obtained. Prices collapsed in 2009 with the global financial crisis forcing South African firms to seek other markets. The MSC (Marine Stewardship Council) certification of the South African hake fishery as "sustainable" became a significant value adding tool, as producers were able to sell frozen hake into the major Northern Hemisphere supermarket chains which now only buy certified sustainable fishery products. Export statistics

indicate that approximately 70% of South Africa's hake catch is exported (R.Cooper, University of Cape Town, pers. comm. October 2012)

Product	Frozen hake	Fresh hake	Value added products
Branding	✓		✓
Labelling and certification	✓		✓
Market relationships/ access	✓	✓	
Quality	✓	✓	✓
South African origin		✓	

Locational requirements

Hake trawl fishing operations occur off the West coast and Agulhas bank using larger vessels requiring port facilities with dry dock and engineering services. Hake fishing thus occurs out of the larger port harbours such as Saldanha Bay, Mossel Bay and Cape Town. Processing factories are located at or close to the fish landing points due to the perishable nature of fish. Frozen head and gutted hake is however sold to processors in other localities such as Gauteng for further processing into value added products. Well established cold chain distribution networks make it possible to distribute fresh and frozen hake throughout southern Africa and export it to Northern Europe and Asia.

Role of fishing harbours

Saldhanha Bay is the only declared fishing harbour suitable for hake trawl operations. Upgrading of service facilities and quays would enhance and consolidate the role of this fishing harbour. St Helena industrial land and close proximity makes it suitable for processing of fish offal into fishmeal and production of seafood value added products.

Constraints to hake fishery development

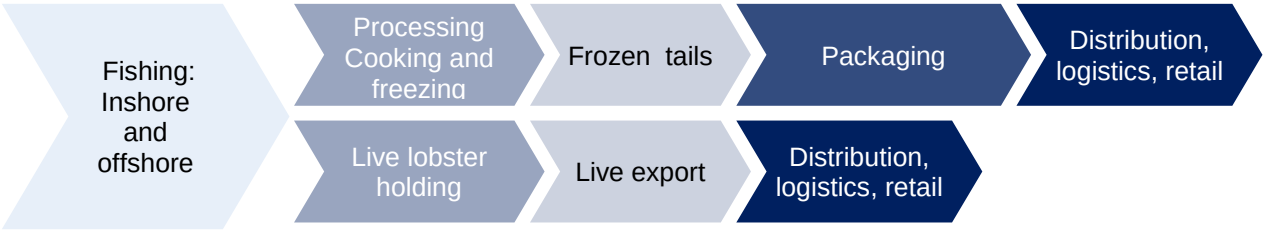
- Institutional weakness in Fisheries Branch is a threat to resource management.
- MSC certification is at risk if stock assessment surveys are not carried out annually.
- Poor management and maintenance of fishing harbour at Saldanha Bay.

Hake fishery value chain enhancement opportunities

- Better management of the Saldanha Fishing Harbour will create service sector opportunity and employment.
- Increased utilisation / processing / marketing of low-value by catch

c. The lobster fishing value chain

The South African rock lobster value chain is well established with a quota managed fishery, processing and live holding facilities, distribution and marketing networks which generate significant additional value though the export of live and frozen rock lobsters to international markets.



Sources of value add

Lobster is a premium seafood which requires no value addition. South African rock lobster is either sold live, or as cooked and frozen tails.

Product	Live lobster	Frozen tails
Branding		
Labelling and certification	✓	✓
Market relationships/ access	✓	✓
Quality	✓	✓
South African origin	✓	✓

Locational requirements

Lobster fishing operations occur off the West and South Cape coast using deck boats (offshore sub-sector) and chuckies (near shore sub-sector) which operate from fishing harbour and port access points closest to the lobster fishing grounds between Port Nolloth and Gansbaai. Processing and live holding facilities are located at the larger ports and fishing harbours (Gansbaai, Hout Bay, Cape Town, St Helena) and lobster at the smaller fishing harbours (Hermanus, Gordon's Bay, Kalk Bay, Lamberts Bay) are transported by road to the processors. Frozen and live lobster is exported to North America, Europe, and Asia. Frozen lobster is also distributed throughout southern Africa.

Role of fishing harbours

The smaller fishing harbour will continue to serve as small vessel mooring and launch sites and as discharge points for rock lobster caught in adjacent fishing zones. The larger industrial harbours (Gansbaai, Hout Bay, Cape Town, St Helena, Saldanha) are important locations for lobster processing, and holding and distributing live lobster due to sea water pumping access. The larger offshore lobster deck boats tend to dock in these harbours.

Constraints to lobster fishery

- Uncertainty in long term rights allocation
- Rampant illegal fishing threatens established value chain institutions
- Poor harbour maintenance and management
- Small scale fishers only participate in the primary catching sector
- Cuts in Total Allowable Catch

Lobster fishery value chain enhancement opportunities

- Participation of small-scale fishers in value chain opportunities beyond primary sector catching
- Small scale local processing and retail – which will require a mechanism to address barriers to entry such as live lobster storage, cold storage and cold chain management, and requirements to be a registered fish processor to avoid food hazards (lobster fresh meat deteriorates very rapidly, hence the predominance of either live or frozen sales).

d. The linefish value chain

The South African line fishery is characterised as a "small-scale" fishery with operators using highly mobile skiboats with crews of up to 15 fishers, and traditional wooden "chuckies" from certain localities. A variety of fish are caught including snoek, the mainstay of the fishery, yellowtail, kabeljou, geelbek and various bottom dwelling spared species (often called "reds"). With the exception of snoek and yellowtail, here are sustainability problems with most linefish species and catches have declined significantly over the last three decades. The Economic and Sectoral Study of the South African fishing industry (Sauer *et al*, 2004) noted that commercial linefish operators are generally not economically viable, and the 2009 DAFF Fishery Performance Reviews revealed a large drop in employment in the linefishery. Line fish nonetheless remain in high demand in the market, which in the face of declining supply is switching to alternatives such as farmed salmon and Vietnamese catfish ("Basa" *Pangasius* species).

Line fish are marketed fresh, either in the round or gutted and gilled, through various distribution networks. Typically, fishers sell their catch as it is landed to a middleman, such as a seafood wholesaler, retailer or traditional "langana". Line fish rights holders thus do not in general participate in the value chain beyond the primary catching operation.

Sources of value add

Certification or labelling of fish is becoming increasingly important in marketing linefish, as evidenced by the highly successful WWF South African Sustainable Seafood Initiative (SASSI) which has elicited high levels of buy-in from consumers, restaurants and retail chains. WWF has initiated a support programme in collaboration with the Marine Stewardship Council to support market access for sustainably certified linefish from traditional fishers. This is potentially a means of capturing greater premium at the higher end of the market that can flow to community producers, as discerning customers are prepared to pay more for high quality, sustainable fish from traditional fishers.

The term fresh "linefish" which is a source of value add is abused as most restaurants sell a variety of fish from other sources including aquaculture (e.g. Vietnamese catfish) and trawling (frozen kingklip, hake) as linefish. Australia has addressed the problem by legally protecting traditional fish names and requiring that that the origin of imported fish is specified.

Product	Fresh linefish	Frozen linefish
Branding		
Labelling and certification	✓	✓
Market relationships/ access	✓	✓
Quality	✓	✓
South African origin	✓	✓

Locational requirements

Linefishing operations are located around access points to the sea, such as fishing harbours and slipways. As skiboats can be moved by road on trailers, the linefish fleet is highly mobile and can deploy from various launch points on the West and South coast depending on where fish such as snoek, yellowtail and geelbek are running. Following the initial sale of fish at the landing points, the catches are rapidly moved by road to wholesale, retail outlets in the metropolitan areas (mainly Cape Town and Johannesburg) or street sellers in the Cape (mainly snoek by langanas).

Role of fishing harbours

Harbours can serve as facilities to promote access of small-scale fishers to the distribution and retail components of the linefish value chain. They may also serve as fisher community focal points to preserve traditional fisher identity and livelihoods.

Constraints to line fishery

- Unsustainability of many species
- Rampant illegal fishing threatens established value chain institutions

- Poor harbour maintenance and management
- Small scale fishers only participate in the primary catching sector
- Cuts in Total Allowable Catch
- Low capability and skills of line fishers

Line fishery value enhancement opportunities

- Provision of premises for retail outlets for traditional fishers.
- Facilities for distribution of linefish.
- Facilities for home industry level value added/ traditional products.
- Opportunities for traditional fishers to participate in restaurant/ seafood outlets with a sustainably branded product.
- Linkage of traditional fishers to the tourism value chain.

3.2.5 Fishing gear manufacturer and repair service providers

Fishery related services, predominantly Cape Town based, include vessel and fishing equipment, packaging, electronics, engineering, clothing, chemicals, bunker services, diving services, cold storage, consultancy services - to name a few (Fishing Industry Handbook, 2011). South Africa is a well-established fish exporter with the necessary infrastructure and service sector including HACCP processing, and EU accredited product health standards (administered by the NCRS - National Regulator of Compulsory Standards).

Large fishing vessels (e.g. demersal and mid-water trawl) are not constructed in South Africa, but are typically purchased second-hand from northern hemisphere nations where the purchase of new fishing vessels is subsidised. Smaller fishing vessels such as those used in the small pelagic, squid, and linefish sectors are manufactured in South Africa by manufacturers such as Stevens in Vredenburg and Lee Cat in the Eastern Cape Province. One fishing boat manufacturer (Talley Marine) on the West coast recently suspended operations due to a drop in sales following the conclusion of the long term fishing rights allocation process.

The smaller active fishing harbours and landing points include Port Nolloth (rock lobster) on the west coast, then moving to the South and East, Hondeklip, Lamberts Bay, Elands Bay (rock lobster and linefish), Laaiplek/St Helena (small pelagic, snoek and lobster), Yserfontein (snoek, lobster), Hout Bay harbour (small pelagics, rock lobster, recreational tuna, eco-tourism charter),

Buffels Bay (snoek), Kalk Bay harbour (rock lobster and linefish), Gordon's Bay (recreational fishing and lobster), Kleinmond (snoek), Gansbaai (small pelagic and fishmeal processing), Hermanus (whale watching), Struisbaai (linefish) and Stilbaai (linefish).

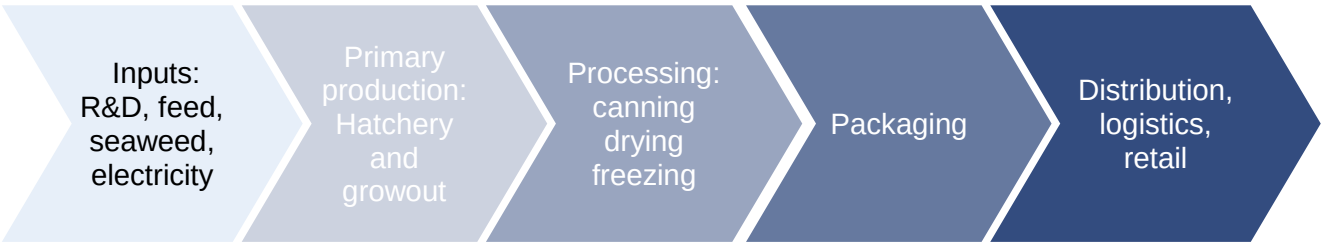
5.3 Aquaculture

The aquaculture industry comprises of distinct sub-sectors, visibly, abalone, trout, marine finfish, mussels and oysters, each with a unique value chain.

5.3.1 The abalone aquaculture value chain

Abalone is high value seafood produced primarily for export to Asia by means of vertically integrated production, processing and marketing operations. Abalone aquaculture has achieved critical mass with established production technology, premium market niche, service industry and coordinated public sector sectoral support. Strong demand from China is stimulating new investment in abalone farms production expected to quadruple in 5-7 years.

There are 12 major abalone farming enterprises which perform all steps in the value chain as far as marketing branded products to importers in China and Japan. Certain aspects of production such as feed supply and canning may be contracted out.



Sources of value add

Product	Canned abalone	Dried abalone	Frozen Abalone
Branding	✓		
Labelling and certification	✓	✓	✓
Market relationships/ access	✓	✓	✓
Quality	✓	✓	✓
South African origin	✓	✓	✓

South African canned abalone brands became established in the 1950's with the growth of the wild abalone fishery, and have provided an entry point for farmed abalone in recent years. South African abalone enjoys a reputation for quality due to inherently good product characteristics (texture, flavour), consistency of product quality, and market perception of quality associated with trusted premium brands. With the dramatic growth in farmed abalone production (ca. 40,000t of mainly *Haliotis discus* hannai) in China and Korea, product discrimination has resulted South African abalone (production ca. 1100t) occupying a premier niche in the market with correspondingly higher prices (Firm demand and prices have stimulated a new wave of investment in South African abalone farms). Abalone is mainly marketed through specialist buyer in Hong Kong with whom producers have long-standing personal relationships. Hong Kong is used as springboard for onselling into mainland China. China has recently introduced a stringent health

certification requirement for imported abalone, which is a potential non-tariff trade barrier. It is unlikely that health certification will result in a market value add. WWF have facilitated the development of an abalone sustainability standard, and abalone farms will soon be able to be certified as "sustainable" by the newly formed Abalone Stewardship Council (ASC). With the current system of sales into China, producers doubt that labelling will add more value, however markets and consumer perceptions are evolving rapidly and sustainability certification may yield market dividends in time to come – as has been demonstrated by the case of South African hake. South African abalone farmers participate in the Molluscan Health Monitoring Programme with a view to obtaining EU certification to be allowed to sell shellfish into Europe.

Frozen and dried abalone products are non-traditional forms of the South African product for which markets exist in China. Some abalone farms are marketing a proportion of their production in these forms, but the bulk is still marketed as canned abalone.

Locational requirements

The abalone aquaculture sub-sector is based in the Overberg around Hermanus and Gansbaai due to the availability of suitable coastal land within the distributional range of *Haliotis midae.* New abalone farm developments are underway at Buffelsjags, West of Gansbaai. This has given rise to a locally based service industry which includes feed supply (pelleted feed and harvested seaweed), canning facilities, veterinary health services, abalone growth basket making, security, transport, building and maintenance and various services and supplies. The Overberg location which is in close proximity to the Cape Town metropolitan area makes it possible to obtain additional services and supplies such as engineering services, plastic products, etc.

The growth of the shore-based abalone aquaculture sub-sector is limited by available coastal land. In view of the expected growth of abalone production, such land is at a premium. Furthermore, land for the abalone service in close proximity to the farms is required to reduce transaction costs, promote local economic development and make the industry more viable.

The abalone production sector has achieved a critical economy of scale making it attractive to develop service businesses near the major farms.

In terms of competing concentrations of activity, it is expected that abalone production will expand on the West coast in the Namaqualand region due to the closure of diamond mining and the allocation of rights for sea-based abalone ranching. While sea ranching of abalone is proposed for the Overberg area, this activity will be more challenging to establish due to the existing fishing rights and entrenched poaching problem.

Role of fishing harbours

Key nodal sites for supporting abalone primary production, processing, services such as feed manufacture and equipment manufacture. Harbours can play a key role in developing abalone stock enhancement by reseeding wild abalone beds with hatchery seed.

Constraints to abalone value chain development

- Shortage of zoned and serviced shore based land constrains expansion
- Single product export vulnerable to externalities e.g. exchange rate, demand in China
- Margin squeeze. Dollar price flat at $30-35 for years, production costs (particularly electricity) increasing

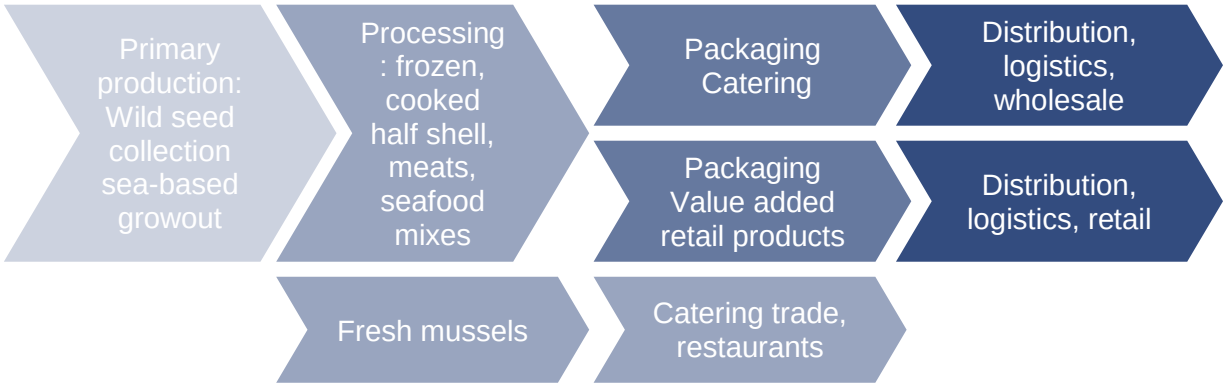
Abalone value chain enhancement opportunities

- Promotion of premium product qualities and image of SA abalone

- New markets such as European Union and U.S.A.
- Investment in R&D to improve production technology, reduce risk and cost
- Development support for stock enhancement of wild abalone beds with hatchery seed to rehabilitate wild abalone beds. Requires coordinated public – private sector plan and business model. Potentially large gains in production (1000t/y) and employment (fishing community divers, guards, employment in canneries)
- New shore based sites with infrastructure will attract investment in new production.
- Industrial land near to abalone farms for the abalone farming service industry (feed, equipment, processing)
- Development of energy efficient pumping technology e.g. wave, wind and solar

5.3.2 The mussel value chain

Mussel farming is based in Saldanha Bay and supports a value chain producing both fresh and value added mussels products for the local market. Operationally, the value chain is vertically integrated up to the wholesale marketing of products. Mussels are either sold fresh into the restaurant trade, of processed into various cooked and frozen forms for seafood mix brands and also catering packs.



Sources of value add

Product	Fresh mussels	Catering products	Retail value added
Branding			
Labelling and certification	✓	✓	✓
Market relationships/ access	✓	✓	✓
Quality	✓	✓	✓
South African origin	✓	✓	✓

South African mussels compete in the local market with imported New Zealand “greenlip” mussels which are cheaper but of lower quality. Value can potentially be added by educating consumers about quality, freshness and the South African origin of local mussel products. Relationships play an important role in selling mussels, for example restauranteurs buy fresh mussels on the basis of availability, quality and knowledge of how to prepare the product. Large seafood processors source cooked and frozen mussels from local producers. Certification of product health is required for accessing the European Union market. Although South Africa operates a shellfish water quality monitoring programme, it does not yet meet EU standards to allow export of shellfish.

Locational requirements

The production of mussels is restricted to Saldanha Bay as this is the only sheltered coastal site suitable for mussel rafts and longlines. The wharfage and quays of Saldanha are essential infrastructure for servicing the sea-based aquaculture operations. Mussel processing takes place in nearby factories in industrial areas of Saldanha/ Vredenburg/ St Helena Bay.

Role of fishing harbours

Saldanha is one of the key nodal sites for primary production. Harbour infrastructure required for service logistics including vessels, sorting, cleaning, equipment, purging, live holding and distribution. Harbour industrial infrastructure at Saldanha and St Helena suitable for processing value added mussel products.

Constraints to the mussel value chain

- Security of tenure of water lease areas
- Exorbitant lease charges
- Red tide, pollution, growing industry at Saldanha
- Poor shore based service facilities

Mussel value chain enhancement opportunities

- Grow production at Saldanha Bay to replace imports.
- Export opportunities if Molluscan Shellfish Monitoring Programme accredited by EU.
- Access to capital for reinvestment in rafts and longlines.
- Expansion of small-scale participation in production.
- New shore-based sites with infrastructure will enhance efficiency and attract investment in new production.
- Promotion of Saldanha Bay mussels as a high quality South African seafood product.

5.3.3 The oyster value chain

The oyster value chain is similar but distinct from the mussel value chain in that only a fresh product is produced for the local restaurant trade and some retail seafood outlets. The production operation is relatively simple in that no feed inputs are required, and oyster spat are imported from overseas hatcheries. No processing of oysters currently occurs, although there are export possibilities for frozen oysters.

Sources of value add

Product	Fresh oysters	Frozen oysters
Branding		
Labelling and certification	✓	✓
Market relationships/	✓	✓

access		
Quality	✓	✓
South African origin	✓	✓

Local oysters have a reputation for quality and flavour as a result of the favourable growing conditions in Saldanha Bay. Health certification would make it possible to access export markets.

Oysters are mainly marketed to wholesalers, restaurants and retail outlets through well-established market relationships.

Locational requirements

The production of mussels is restricted to Saldanha Bay as this is the only sheltered coastal site in the Western Cape suitable for oyster rafts and longlines. The wharfage and quays of Saldanha are essential infrastructure for servicing the sea-based aquaculture operations. Competing locations for oyster production are Namibia (Walvis Bay and Luderitz) and Port Elizabeth.

Role of fishing harbours

Oyster culture is limited to Saldanha Bay as it is the only sheltered water area. Harbour infrastructure required for service logistics including vessels, sorting, cleaning, equipment, purging, live holding and distribution.

Constraints to oyster value chain development

- Water and product testing a significant cost to small scale producers
- Red tide closures reduce profitability
- Poor shore based service facilities
- Insecure Portnet water leases
- Growing pollution and industrialization at Saldanha
- Regulatory red tape a significant management constraint

Oyster value chain enhancement opportunities

- Export market opportunities
- Promotion of South African cultured oysters on local market
- More efficient product health testing
- Better shore based service facilities at Saldanha Bay
- Tours of oyster farms and local on-farm tasting by tourists

5.3.4 The salmon value chain

Fresh aquacultured salmon is imported into South Africa in growing quantities from Norway and Chile to meet the demand for sushi fish and fresh table fish. Thus apart from primary production, the value chain and market for salmon is established in South Africa. A pilot project is underway to rear salmon in sea cages in Saldanha as this site offers a comparative advantage in that locally produced salmon will be fresher and potentially better quality than imported products. The required aquaculture supply chain infrastructure, services and skills largely exist to develop salmon farming in South Africa.

Sources of value add

Product	Fresh salmon	Processed salmon products
Branding	✓	✓
Labelling and certification	✓	✓
Market relationships/ access	✓	✓
Quality	✓	✓
South African origin	✓	✓

Well-conceived and targeted marketing of locally produced salmon using various value adding strategies will be essential to realising the potential value of the product. These include branding with trusted names (e.g. Woolworths), labelling as “sustainable” or SASSI “Green”, market relationships with retail chains and restaurants, superior product quality, and emphasis on South African origin.

Locational requirements

Primary salmon production will be restricted to Saldanha Bay as sea cages require sheltered waters and suitable harbour facilities and wharfage for shore based service facilities and service vessels. The production of salmon smolts from fry occurs in fresh water and thus trout farm facilities are required for this initial phase of primary production. Processing beyond initial gutting and grilling can take place anywhere within the greater Western Cape metropolitan area, and would logically occur at existing trout processing establishments.

Role of fishing harbours

Saldanha Bay is a key nodal site supporting primary production, processing, services such as fish processing, net cleaning, and vessel support**.**

Constraints to salmon value chain development

- Access to suitable water
- Need shore based service facilities at Saldanha Bay harbor

Oyster value chain enhancement opportunities

- Local market opportunity for import substitution ca. 1000 tons
- Promotion of locally grown, superior product
- Establishment of salmon growout at Saldanha Bay
- Shore based aquaculture service facilities in Saldanha Bay

5.3.5 Conclusions

Conclusions

The South African fishing sector supports a well-established industrial fishery with an efficient supporting infrastructure and service industry. The major commercial fishery stocks are in a reasonable condition with well-established management procedures. However, pervasive administrative inefficiency within the fishery management authority and a failure to carry out key functions threatens the sustainability of the fishing industry. The coastal small vessel fisheries (lobster, abalone, linefish) have serious sustainability problems with widespread illegal fishing which is a complicating factor in the implementation of the small scale fishing policy. Uncertainty about the implementation of the small scale fishing policy and reallocation of medium-term fishing rights expiring in 2014/15 has added to an uncertain fishing business environment and to social unrest in fishing communities.

In terms of economic performance, the industry has performed relatively well through the recession, with the hake MSC eco-label certification opening up the northern European market for South African producers following a drop in demand for fresh hake from the traditional Spanish market.

Overall, there has been a concentration of fishing operations into the larger ports and a number of the smaller regional fishing harbours are under-utilised. The apparent drop in fishing sector employment by 15% between 2000 and 2008 reflects a decline in small-scale fishing operations and a consolidation of non-viable fishing rights into larger entities. In order to enhance the socio-economic benefit from the fishery sector, policy makers need to move beyond simply managing the primary catching sector and need to consider the performance of the fishing industry value chain as a whole.

Alternative value chains based on marine resources such as recreational fishing, fine food tourism and boat repair activities should also be included in a developmental approach to supporting small-scale fishing enterprises. The implementation of a developmental approach to supporting small scale fishers and their communities to participate in the enterprise opportunities available will require a new institutional approach based on co-management and supported by cooperative governance arrangements involving all levels of government, stakeholders, established industry and NGOs.

5.4 Boatbuilding and repair[45]

In this section, a synopsis of the value chain for boatbuilding in the Western Cape is presented, followed by a summary of value chain opportunities which could be used to develop economic opportunities linked to fishing harbours.

The boatbuilding and repair value chain

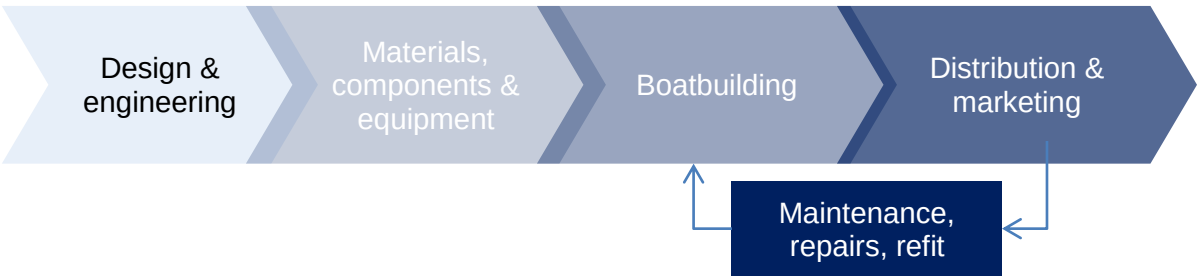
The **boatbuilding industry** in South Africa was estimated to produce goods and services to the value of R1.2bn and support employment of 4,500 people in 2009[46], although estimates are that it has contracted since then. The core boatbuilding sector in South Africa is estimated to comprise approximately 68 companies, with the wider boatbuilding value chain - including suppliers of key inputs and services providers – has been estimated at about 200 companies and employ over 2,800 people.

South Africa's production has traditionally focused on cruising multihull production, but also includes other sailing craft, rigid inflatables, personal water craft such as kayaks and commercial vessels such as crew transport boats for the oil and gas sector, patrol boats, and fire-fighting boats.

Limited information is available on the **domestic market size**, some rough indicators are:

- Estimates of total national boat ownership are between 30,000 and 100,000, depending on the definition of a boat[47]
- Around 1,000 boats with outboard engines and 150 boats with inboard engines are estimated to be sold each year48
- An estimated 2,280 outboard motors were sold through wholesale channels in 201149 (which are mostly destined for the domestic market, including after-market replacements)
- A survey of 43 companies in 2011 showed total domestic sales of R211m
- Total boatbuilding related imports in 2010 were valued at US$27m based on UN Comtrade trade statistics

The diagram below provides a summary of the boatbuilding value chain at an overall level.



Services associated with the boatbuilding value chain include:

- Design; R&D, product development and testing; certification; training; marketing, sales & distribution
- Services linked to boat ownership and management, including finance and insurance; surveying; repair and maintenance; refurbishment

[45] Note: For boating tourism aspects, please see the tourism value chain section.
[46] the dti (2011) Industrial Policy Action Plan 2011/12 - 2013/14
[47] http://www.capetown.travel/media/blog/entry/cape_town_boat_industry_on_the_up/
[48] http://www.capetown.travel/media/blog/entry/cape_town_boat_industry_on_the_up/
[49] Association of Motorcycle Importers & Distributors (AMID). According to Honda Marine, roughly 1 in 4 exported RHIBs is fitted with an outboard engine prior to export. The remaining 3 in 4 are exported without an outboard motor, and are fitted with motors in the destination market.

- Boating-related services, including marine tourism; events management; fleet operation; charter / rentals services; sailing clubs

In addition, a wide range of support institutions and organisations are involved in supporting the sector, including MIASA, SAMSA, various industry and boating associations, etc.

There are **variations within boatbuilding** value chains, in particular related to:

- **Application**, with key distinctions between recreational and commercial boats:
  - **Recreational vessels** for leisure or sport: the sales and distribution channels focus on direct sales or sales through agents to relatively high net worth individuals, with brands, quality and after-care being key issues
  - **Commercial vessels** include fishing, defence/security, offshore activity supply boats, passenger & cargo transport: buyers in this case are corporates, public sector or parastatals, and formal tendering processes are followed, with reliability, scale of production and price being critical.
- **Materials used**: e.g. wood, metal, fibre glass hulls
  - The skills and technology required are somewhat different for different materials in terms of hull construction
  - However, often the fitting and finishing requirements will be similar e.g. fitting of equipment, cabinetry, painting
- **Means of propulsion**, e.g. sail, motor or engine, and self-propelled‟ (i.e. rowing, paddling)
- **Size of vessel:** ranging from small personal watercraft (such as kayaks) through to super yachts over 100 ft

  - The size of vessel has implications for the size of both production and launch facilities that are needed

A more complex representation of the value chain incorporating these variations and services is provided in the diagram below.

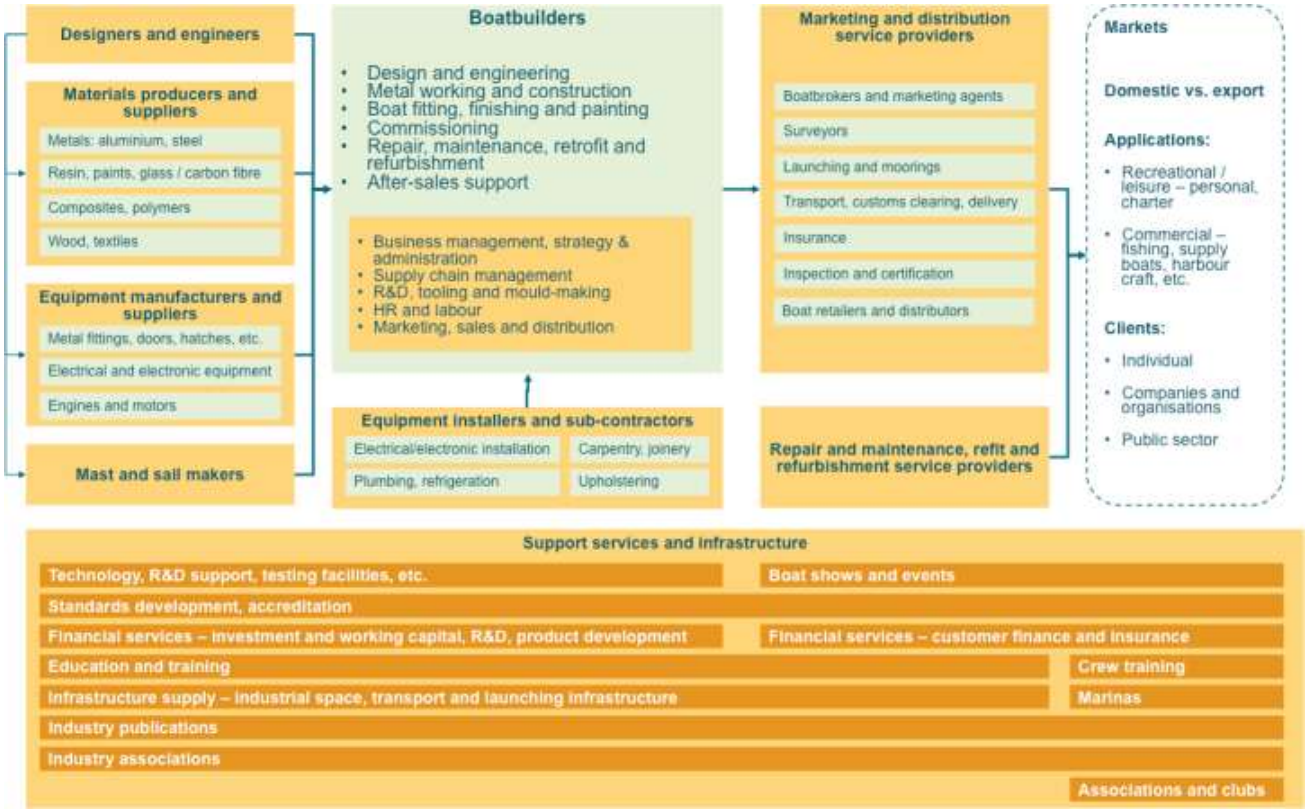


Figure 102: Boatbuilding value chain

Boatbuilding has some quite different characteristics to other manufacturing. It has long production times, lower volume of production, and high unit values (especially for larger boats). This results in significant cash flow challenges and high barriers to entry.

The **boatbuilding value chain has links to a number of other sectors** (in addition to the shipbuilding sector where links include design, skills base, and use of infrastructure). For example, companies may manufacture products that use similar inputs and require similar production processes. Examples of related sectors include aerospace, architecture, construction, interior design and furniture, and renewable energy (e.g. blade production).

Sources of value add

The table below summarises the sources of value add within the boatbuilding value chain.

Product	Recreational	Commercial
Design and engineered (incl. for efficiency)	✓	✓
Quality	✓	✓
Customisation	✓	✓
Marketing, relationships	✓	
Reputation, brand	✓	✓
Internationally recognised components and equipment	✓	✓
Shorter lead times	✓	✓
Ability to see/test/experience product	✓	✓
After-care	✓	✓

Figure 103: Sources of value add (boatbuilding)

In terms of marketing, additional value can be secured through joint marketing with luxury tourism destinations and packages; for example some South African boatbuilders work with hotels in the Indian Ocean Islands.

Locational requirements

Locational requirements include the following:

- Easy access to boat building skills, suppliers and clients, and ability to freely draw in skills and suppliers that are not readily available in the local area
- Cost-effective and competitive space
- Security and lack of crime
- Close to marine access for launching and commissioning
- Long term leases to enable return on investment in facilities

The Western Cape is one of the dominant locations in South Africa for boatbuilding – estimates are that around 30 to 40% of national production takes place in the province. Other key locations include KwaZulu-Natal and the Eastern Cape. The Western Cape's estimated share of boatbuilders within different product segments is as follows:

- Sail boats – large:56%
- Sail boats – small (dinghies): 67%
- Motor boats – fibreglass: 35%
- Motor boats – metal: 100%
- Motor boats – rigid inflatables: 63%
- Personal recreational craft: 14%

There is already some organic clustering of boatbuilding and supplier activity in the Western Cape, with concentration of activity in Paardeneiland (e.g. Jaz Marine, Veecraft) and the V&A Waterfront area. There are some producers outside of the metro, including Vredenburg (commercial craft) and Riversdale (inflatables). There is also already some activity within the fishing harbours, in particular in terms of boat repair.

Yachts	Suburb	Place
Bongers Marine	Strand	Strand
Celtic Yachts	Killarney Gardens	Cape Town
Dean Catamarans	Atlantis	Atlantis
Jacobs Brothers Yacht builders	Dieprivier	Cape Town
Jaz Marine	Paardeneiland	Cape Town
Matrix Yachts	Killarney Gardens	Cape Town
Maverick Yacht-builders	Montague Gardens	Cape Town
Mendes Yacht Builders	Waterfront	Cape Town
Pacer Yachts	Killarney Gardens	Cape Town
Randle Yachts	Retreat	Cape Town
Robertson and Caine	Woodstock, Paardeneiland	Cape Town
Stealth Yachts	Epping	Cape Town
Voyage Yachts	Paardeneiland	Cape Town
Wayne Robinson Yachts	Dieprivier	Cape Town

Commercial Craft	Suburb	Place
Nautic Africa	Paardeneiland	Cape Town
Tulley Marine	St Helena Bay	West Coast
Veecraft	Paardeneiland	Cape Town

Role of fishing harbours

The main role of fishing harbours at present in relation to the boatbuilding value chain is repair of boats, in particular fishing vessels, but also including leisure craft. Slipway and repair facilities exist at most harbours, and in some cases repair companies are based at the harbours e.g. Laaiplek, Saldanha Bay, Hout Bay, Kalk Bay, Gordon's Bay, Hermanus and Gansbaai.

There is also a role in terms of cleaning and storage of vessels. For example, a new company started by members of the Hangberg community has started in Hout Bay harbour around cleaning, storage and repair of vessels.

Marinas and yacht or small boat clubs are often based in the harbours, although they can also be in privately owned harbours – see the table below for current marinas and clubs in the Western Cape.

Marinas / anchorages	Place
Port Owen Marina	Close to Laaiplek
Saldanha Yacht Club	Saldanha Bay
Club Mykonos	Langebaan
Langebaan Yacht Club	Langebaan
Royal Cape Yacht Club	Cape Town
Cape Grace Marina	Cape Town
Granger Bay Marina	Cape Town
Hout Bay Yacht Club	Hout Bay
Atlantic Boat Club	Hout Bay
False Bay Yacht Club	Simon's Town
Gordon's Bay Yacht Club	Gordon's Bay

For the role in relation to boating tourism, please see the tourism section.

Constraints to boatbuilding value chain development

The South African boatbuilding industry overall is experiencing numerous challenges and is trying to find ways to become more competitive. The industry has traditionally been dominated by the leisure craft market, in particular multi-hull or catamaran vessels, and has contracted in recent years due to reduced demand in traditional US and EU markets during the global financial crisis, and increased competition from other producer countries. There is recognition within industry support structures that in order to sustain and grow the industry it will be necessary to improve capabilities to remain competitive in traditional markets, diversify to non-traditional high-growth geographical markets, and expand into commercial vessel markets.

Some of the challenges include:

- Lack of a large domestic market to serve as a base
- Out-dated technology in some cases
- Limited resources for product development and design (including regularly producing new moulds)

- Speeding up the production cycle, whilst retaining customization capability, which is a key differentiator

- Shortage of management skills
- Access to finance and working capital
- Finding resources for the necessary strong marketing effort and after-sales infrastructure to enter new markets

Opportunities to boatbuilding value chain development

It is unlikely that large recreational boat builders will relocate to fishing harbours, given their size requirements and existing clustering. However, there may be some opportunities for **smaller vessel builders** (both leisure and commercial). If the fishing fleet revitalisation programme goes ahead, and is led by a government programme, there could also be particular opportunities to form a cluster of activity within fishing harbours e.g. in St Helena and/or Gansbaai harbours. These opportunities will depend on conditions such as:

- Long-term and affordable leases
- Lack of crime and better security in harbours

There could also be **additional boat cleaning, storage and repair** opportunities in fishing harbours, in particular if levels of recreational boating activity are increased. Higher volume locations could include Hout Bay, Hermanus, Gordon's Bay, Kalk Bay, and Struisbaai. Realising these opportunities will depend on:

- Cost competitive available space, including storage space for personal water craft and recreational vessels to support boating tourism
- Long-term leases
- Environmentally sound facilities
  - e.g. tenting, filtration, bilge water and black tank drainage systems
  - Ultimately these facilities should be certified e.g. ISO 14000, blue flag marina
- Ease of pull out and launch, including well-managed slipway services

There may also be **education and training** opportunities with harbours. These could include:

- Leisure: Youth training, skipper training / first time boat owners
- Commercial: fishing vessel and charter operator training
- Retaining traditional boatbuilding skills
- Berths for training vessels
- Training rooms
- Launch facilities for smaller boats / life rafts
- Parking / public transport access
- Accommodation in close proximity to harbours

Harbours also represent **marketing opportunities for the local industry**, in particular to expose potential first-time boat-owners to their options in an open and inviting environment. There may also be **merchandising** opportunities around boatbuilding e.g. **retail of specialist clothing and equipment**.

On site **access to inspection and certification services** (including SAMSA annual boat licensing) would also be valuable, although it would be an enabling service rather than a commercial opportunity.

Significant opportunities could exist in boating-related tourism by building harbours as **boating "destinations" and hubs**, and contributing to **domestic boating market development** (supporting the "Grow Boating" campaign) – please see the tourism section for a discussion of these.

5.5 Tourism value chain

In this section, a synopsis of the value chain for tourism is presented, followed by a summary of value chain opportunities which could be used to develop economic opportunities linked to fishing harbours.

Value chain overview

Since 2003, South Africa has seen an increasing amount of international tourists visiting the country, with an amount of 6.5m international tourists in 2003 and 8.1m tourists in 2010. During 2011, the Western Cape received around 1.4m international tourists, who in turn spent over R18.2 billion in the province[50]. The average amount of international tourists visiting the Western Cape from 2003 till 2010 was around 1.6m. The largest source markets of international tourists have been the UK and Germany. International tourists spent an amount of R20m on bednights in the Western Cape in 2010 and in the same year an amount of R21.7bn was received by the Western Cape.

Domestic trips to the Western Cape only form a small part of South African tourism. Nevertheless, an amount of R3.3bn was received from 2.7m domestic tourists visiting the Western Cape in 2010. The largest source markets for domestic travel to the Western Cape throughout the years are tourists from Gauteng and within the Western Cape.

The table below shows tourism international and domestic tourism numbers in respect of the Western Cape.

Table 41: Tourism numbers South African and the Western Cape (WC). Source: *Cape Town Routes Unlimited*

	2010	2009	2008	2007	2006	2005	2004	2003
Foreign arrivals to SA	8.1m	9.9m	9.6m	9.1m	8.4m	7.4m	6.7m	6.5m
Foreign arrivals to WC	1.5m	1.5m	1.6m	1.8bn	1.7m	1.6m	1.5m	1.5m
Bednights spent in WC by foreign arrivals	R20m	R17.9m	R21.1m	20.1m	R19.8m	R16.9m	R16.1m	R15.7m
Total receipts from foreign visitors to WC	R21.7bn	R20bn	R20.8bn	R17.7bn	R19.8bn	R14.9bn	R8.9bn	R8.2bn
Largest source markets of foreign visitors	UK & Germany	UK & Germany	UK & Germany	UK & Germany	UK & Germany	UK & Germany	UK & Germany	UK & Germany

[50] Government press release, 15 Oct 2012, Western Cape Minister of Finance, Economic Development and Tourism Alan Winde: Western Cape Tourism Industry must prepare for summer season

	2010	2009	2008	2007	2006	2005	2004	2003
Domestic trips to WC	2.7m	3.6m	4.1m	n/a	3.2m	3m	n/a	5.1m
Receipts from domestic trips to WC	R3.3bn	R2.6bn	R3.9bn	n/a	n/a	R2bn	n/a	R8.3m
Largest source market of domestic visitors	Gauteng & WC	Gauteng & WC	Gauteng & WC	n/a	KZN & Gauteng	KZN & Gauteng	Gauteng & WC	WC & EC

Tourism has a quite different value chain from most sectors, given that the nature of the product/service is an "experience" which tends to require involvement from many players to deliver. An illustration of the tourism value chain is provided in the diagram below.

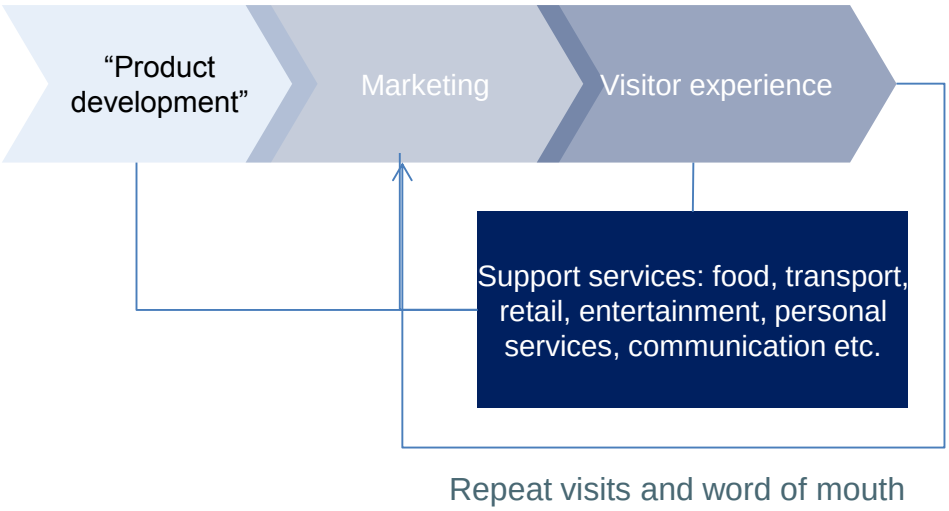


Figure 104: Simplified illustration of tourism value chain

Role players within the "direct" tourism value chain include the following:

- Travel agents and booking agents
- Accommodation providers (hotels, guest houses, B&Bs, lodges, backpackers, campsites etc.)
- Tour guides

Related support industries include:

- Public and private transport – air, road, rail, water (including boat charters which are of particular relevance to harbours)
- Hospitality – restaurants and bars
- Event organisers
- Entertainment providers (performing arts, sports and recreation)
- Curios and handcrafts producers
- Specialist and generalist retailers, including food, clothing, et
- Equipment rental e.g. cell phone hire, sports equipment hire

Sources of value add

Sources of value add within tourism can include:

- Unique or highly differentiated product
- Ease of access (distance, availability of transport)
- Service levels / quality of the experience
- Marketing and reputation in the market
- Diversity of experiences e.g. to enable a longer stay or meet the needs of a group with different interests
    - The CTRU 2010 visitor tracking survey showed that visitors to the Cape are often here for multiple reasons e.g. both business and leisure

- Responsible tourism operations – many tourists would like to know that local communities are benefiting from tourism, and that it is being done in an environmentally sustainable manner

Locational requirements

Organised groups tend to visit locations where their tour operators have agreements with the local operators, where there are available facilities and are located within suitable distances.

In the case of independent travellers, decisions are based on individual preferences with distance between one attraction and the next and the mix of available offerings along the route also informing decision-making. In both cases, awareness of the product offering is important, including good communication with operators, a good presence online and in guidebooks etc.

Current tourism and recreational activity around the fishing harbours

Designated fishing harbours have a key role to play in the tourism industry, providing marine access and bases of operation for marine-based tourism, with shark-cage diving, pelagic bird watching and whale watching being a few examples. The nature and volume of activity varies significantly between harbours, as well as whom they serve: local communities, domestic tourists and/or international tourists.

The table below provides a summary of current tourism and recreation activity in the harbours and their surrounds:

Harbour	Current tourism & recreational activity
Lamberts Bay	▶ Attractions and activities in the harbour: - Bird Island - Isabellas restaurant - Craft shop and informal shell craft sales - Boat trips - Kreef shuttle service ▶ Attractions in the surrounding areas: flowers, West Coast culture, Muisbosskerm restaurant, Kreef festival, smallest desert in the world, Cederberg, rooibos, conference hosting at the hotel ▶ Limited and seasonal tourism volumes (primarily flower season), mix of local and international, from mid to high end

Laaiplek	▶ Attractions and activities in the harbour: - Restaurants - Recreational fishing - Café and curio shop - Community events e.g. annual church service for fisherman - Berg River mouth (currently not accessible to tourists, closed off within DAFF area) ▶ Attractions in the surrounding areas: Adjacent municipal resort, Port Owen marina, Pelican Harbour, Bokkom Laan (cultural tourism, restaurants, boat trips, estuary views), fishing museum, Berg River Estuary (bird watching, natural beauty), canoe marathon and recreational boating, festivals ▶ Highly seasonal tourism (primarily summer), low volumes are a constraint to sustainability of tourism enterprises
St Helena Bay	▶ Attractions and activities: - Fishing activity (esp. during snoek run) - Fish shop - Used to be floating bar ▶ Attractions in the surrounding areas: Restaurants, West Coast culture ▶ Currently limited tourism facilities and activity, seasonal peaks (summer)
Saldanha Bay	▶ Attractions and activities: - Restaurant - Sea Harvest fish shop - Traditional fishing operations ▶ Attractions in the surrounding areas: Sailing, Hoedjieskop historical fishing cottages, Langebaan lagoon, other watersports, festivals ▶ Limited tourism volumes, primarily considered an industrial area
Hout Bay	▶ Attractions and activities: - Seal Island trips - Part of various couch day trips of the Peninsula (arrive around 8 – 9 am, depart after boat trip) - Numerous restaurants, take-aways and bars, including Mariner's Wharf complex - Fish shops - Sport / recreational fishing trips - Bird-watching trips - Sailing and power boating – yacht and boat club - Craft and curio sales - Fishing activity, in particular small-scale community operations ▶ Attractions in the surrounding areas: Bay Harbour market (attracting approximately 3,000 visitors on Friday nights), Hangberg community guides and tours, Chapman's Peak, beaches, markets ▶ Relatively large tourism volumes assisted by proximity to Cape Town, but challenges with seasonality and securing value from coach operations, and integration of fishing community into tourism value chain
Kalk Bay	▶ Attractions and activities: - Restaurants and take-aways from lower through to high end/ fine dining - Fish cleaning and sales - Informal craft and art retail - Beach

	- Traditional wooden boats and fishing community - "Aesthetic appeal" of the setting - Recreational fishing ▶ Attractions in the surrounding areas: Kalk Bay restaurants, cafes and bars, retail (antiques, crafts, fashion etc.), beaches, water-based sports (surfing, kayaking etc.) ▶ Relatively large tourism volumes assisted by proximity to Cape Town and relative ease of access (public transport, pedestrian route from Kalk Bay, some parking), but challenges with seasonality, viability of boat-based operations (including weather and sea conditions hamper operations, challenges securing whale-watching licenses), and integration of fishing community into tourism value chain
Gordon's Bay	▶ Attractions and activities: - Yacht club and sail boats - Restaurants - "Aesthetic appeal" of the setting - Craft sales ▶ Attractions in the surrounding areas: Beaches, coastal drives, Strand ▶ Medium tourism volumes, highly seasonal, peaking in December/January
Hermanus	▶ Attractions and activities: - Boat-based whale watching - Restaurants - Ski boat club - Abalone farm tours ▶ Attractions in the surrounding areas: Land-based whale-watching, festivals, wine, restaurants, cafes and bars, beaches, natural beauty, museums ▶ Tourism more spread throughout the year than most harbours thanks to whale season (estimated 20.000 tourist visitors to the harbour from May to September primarily related to whale watching), relatively high proportion of international and higher-end visitors to the harbour
Gansbaai	▶ Attractions and activities: - Sailing - Boat-based whale watching operator - Net repair - Restaurants and fish take-away ▶ Attractions in the surrounding areas: Adjacent picnic and camping area, shark-cage diving in Kleinbaai, Danger Point lighthouse, high-end reserves and lodges, beaches, whale watching, recreational fishing ▶ Limited tourism volumes, primarily seen as an industrial harbour, and Kleinbaai shark-cage diving tends to be a day trip from Cape Town
Arniston	▶ Attractions and activities: - Traditional fishing and fisher community ▶ Attractions in the surrounding areas: - Adjacent to Arniston hotel - Kassiesbaai 200-year old traditional fishing village (including Kassies Kove community restaurant, handcrafts and guest house) that has provided the visual identity for the Arniston town as a whole, is a national heritage site and an international tourist attraction - Beaches, warm sea water (28C) in summer ▶ Seasonal volumes, but high share of international tourists, domestic tourist

	volumes mostly in summer, but relatively remote from Cape Town
Struisbaai	▶ Attractions and activities: - Fishing activity – traditional boats, fish cleaning and sales - Restaurant / coffee shop - Beach - Boardwalk - "Tame" rays that have received media attention/become an attraction - Planned private sector high-end hotel development ▶ Attractions in the surrounding areas: Adventure tourism / extreme sports such as kite surfing, emerging wine estates ▶ Relatively small tourism volumes, seasonal (summer) and quite remote with no public transport access
Stilbaai	▶ Attractions and activities: - Fish sales, recreational fishing - Community recreation in the past – pedestrian route from the town along the beach which is now closed off - Previously there was a restaurant ▶ Attractions in the surrounding areas: ancient fish traps and shell middens, *Blombos cave archaeological site,* nature reserve, sports events (e.g. triathlon, boat races), community-based tourism in Melkhoutfontein (e.g. linked to Dreamcatcher Foundation), beaches, river, surfing and other water sports, festivals, restaurants, Garden Route ▶ Relatively small tourism volumes and highly seasonal (summer)

Emphasizing the importance of fishing harbours in the tourism industry, a review of the list of shark-cage diving and sea-based whale-watching permits shows that approximately 30% of permits in the Western Cape are for operators based in designated fishing harbours:

- Arniston (1)
- Cape Point to Kalk Bay (1)
- Gansbaai (1)
- Hermanus (4)
- Hout Bay (1)

Opportunities for tourism development within harbours

The most unique potential role of harbours within the tourism value chain is in terms of **marine access**, with specific opportunities including:

- Charters and specialist boat trips: Whale watching, adventure, nature, game fishing, shark cage diving, island trips, cuisine and entertainment
- Sailing, power boating, and personal water craft related activities, including marina facilities and routes
- Recreational fishing

These opportunities will not be equally available to all harbours, due to issues such as sea and weather conditions and scale of market opportunity.

Support facilities and services related to these activities also represent opportunities e.g. food and beverage and retail, media centres, photography services etc.

In addition, due to their attractiveness to people, harbours can serve as **drawcards or hubs for tourism activity and promotion**, including opportunities such as:

- Festivals

- Performances
- Markets
- Sports events
- Family activities
- Historical and cultural tourism, in particular relating to fisher communities
- Hospitality – fine food, wine, venues
- Showcasing the "hinterland"

Constraints to tourism value chain development and requirements

Any harbour-related tourism development will be subject to the same challenges of seasonality and competition faced by all tourism operators. The remoteness of many fishing harbours, and therefore being outside many tourist routes, provides a major challenge. Seasonality is also a critical challenge to the sustainability of tourism businesses.

In some cases there are tensions between tourism and recreational uses and other uses e.g. the smells generated by fish processing factories in Gansbaai and Laaiplek are considered unpleasant and a deterrent to both tourism and property ownership in the area.

Fishing vs. tourism seasonality patterns

The differences and overlaps in seasonality of tourism vs. fishing present some opportunities to strengthen the livelihoods of fishing communities.

- Industrial small pelagic fishing: Closed season from 1 November to 14 January
- Rock lobster: Commercial rock lobster ran from 1 October 2011 to 30 June 2012, recreational lobster from Nov 15 2011 to Jan 15 2012 and again from Apr 6-9 2012
- Snoek (migratory fish): Moves down the West coast towards Cape Town and the Agulhas bank. Peak West Coast months are April-May-June with the fish then moving south of Gansbaai in June-July-August, after which they move offshore and migrate North again.
- Yellowtail (migratory line fish): Present in False Bay in summer, then moving up coast
- Geelbek are caught off the Agulhas bank in summer and then the adults migrate up towards Durban in late summer (Struis/ Still baai get them late summer).

The closure of industrial processing during the peak summer holiday period has the advantage of less smell and noise during this period which could be a deterrent to tourism. Alternative seasonal work in the tourism industry could also support fishing processing seasonal workers.

On the other hand, the availability of lobster and line fish during the summer months coincides with large visitor numbers who can be sold premium fresh produce.

Festivals and events

The unique heritage and character of each harbour and their communities are attributes that should be utilised to attract visitors - and this potential has been recognised by organisations such as Birdlife SA and WWF.

The annual Birdlife SA "Save our Seabirds" festivals are used to build awareness, recognise the relationship between the harbours and the marine environment and its protection, promote ecotourism and to increase understanding of career opportunities related to the marine environment. BirdlifeSA has recently expressed interest in widening their festivals' focus from a mainly Cape Town-based one, to one incorporating the fishing harbours.

The interest expressed in including the harbours highlights the great potential for the fishing harbours to host events. Events and festivals can be a strategy for attracting visitors at fishing harbours in localities with a seasonal tourist trades and for attracting tourists who otherwise may not have visited.

There could also potentially be associated opportunities for harbour-related merchandising, which could generate revenue and help to build brand awareness.

Yachting-related opportunities

There are a number of yachting routes which can be used by sailing and motor yachts. These routes are mainly possible from October to April, subject to weather. The routes in the Western Cape are strongly influenced the South Atlantic weather conditions and difficult to plan in certain times of the year. In the winter (June to September) the Cape can experience cold fronts and storms. Some good days can occur between fronts, but it's not wise to be far from a harbour and one should be aware of heavy swell and waves. The shoulder months (October to December and April to May) are good for sailing although strong southeaster winds can blow for lengthy periods from November to March.

Bare boat chartering

There is very little bare boat chartering (as seen in the West Indies or the Mediterranean) available in the Western Cape, partly because of the risks associated with the weather, and the short season. There are some yacht owners who will hire their boats, but with themselves aboard.

Sail training

There are a number of sail training schools operating out of Saldanha Bay, Cape Town, Hout Bay, Simon's Town and Gordon's Bay. These offer a type of yachting tourism, while gaining a recognised sailing certificate.

Sightseeing tours

In most of the harbours, there are licensed passenger crafts for morning or day tours on the water to places of interest such as Camps Bay, Seal Island, or for whale watching and birding.[51]

Possible sailing routes

West Coast Route: *Cape Town, to Saldanha Bay (Club Mykonos) to Port Owen Marina, possibly extending to Lamberts Bay.*

Day 1 (7 hours sail, 4 hours power)

The first leg is past Robben Island and Dassen Island, along an interesting coastline and into the safe harbour of Saldanha Bay. The Mykonos marina provides a pleasant stop. There is a yacht servicing centre in Saldanha Bay (Yachtport)

Day 2 (5 hours sail, 3 hours power)

The next leg is via Paternoster, where a brief stop can be made (or an overnight at anchor) and into St Helena Bay then into the river entrance at Laaiplek then into the Port Owen private marina which is well served. At this stage, the marina is experiencing silting and larger vessels would be advised to use the Laaiplek pier. This area has salt pans and interesting bird life.

Day 3

It would be possible to return to Cape Town in one long day or to continue up the coast to Lamberts Bay (4 hours sail, 2½ power), where there is a safe harbour and small town with facilities.

Cape Town:

Cape Town has a number of day sail options. At present, these are well served by commercial cruises out of the V&A Waterfront. There is a space for yacht charter as in the West Indies or the Mediterranean.

[51] Times are dependent on wind direction and type of craft. All harbours mentioned are suitable for all - except very large (>80ft length or >3m depth) - crafts

Robben Island (4 hour sail, 2½ hour power): Regrettably, although this was permitted in the past, Robben Island harbour has now been closed to visiting yachts. Instead, there is a pleasant sail round the island and back to Cape Town harbour or the V&A Waterfront.

Coast (4 hours sail, 2½ hours power): The coastline south of Cape Town harbour is visually impressive with the beaches and suburbs leading onto the Twelve Apostles range. Good anchorage is possible off Clifton. This is a pleasant day sail with the possibility of anchoring, swimming and viewing sunsets.

South Coast Route: *one day or three day route*
One day - around Cape Point: Hout Bay Harbour to Simon's Town

This is a one day sail around the iconic Cape Point. There can be regular sightings of whales in season, dolphins and seals. Both Simon's Town and Hout Bay have good harbours, yacht clubs and marinas, and restaurants and tourist attractions nearby.

Four days - Cape Town to Hout Bay to Simon's Town (around Cape Point) to Gordon's Bay to Hermanus

Day 1 (4 hours sail, 2½ hours power)
From Cape Town, along a very scenic shore, ending up passing Seal Island into Hout Bay, where there is a good yacht club, and restaurants.

Day 2 (7 hours sail, 4 hours power)
Along Long Beach (Noordhoek) and a barren coast by Misty Bay and Slangkop light to Bellows Rock and Cape Point then into False Bay, past Miller's Point and into Simon's Town. Mooring at the marina, there is a good yacht club and restaurants in this Victorian Town.

Day 3 (3½ hours sail, 2 hours power)
After a visit to Simon's Town with its museums and the Naval Base, a leisurely sail across False Bay past Seal Island with seals and white sharks, to Gordon's Bay. There is a marina and a yacht club and good restaurants near the harbour.

Day 4 (5 hour sail, 3 hours power)
From Hout Bay to Hermanus. The first part of the sail is through False Bay (with a potential stop in Kalk Bay), then around Cape Hangklip, passing Pringle Bay and Betty's Bay, Kleinmond and into Hermanus harbour. At present there are few facilities for visiting yachts in Hermanus and the town is some distance. There are restaurants in the harbour area.

In general, the yachting tourism is dominated by day passenger boats out of harbours and sail training. There is potential for more yachting tourism such as boat chartering, but the season will be short due to weather conditions.

Royal Cape Yacht Club opportunity

The upcoming expiration of Cape Town's Royal Yacht Club lease may present an opportunity for the harbours in the Western Cape to diversify into offering yacht mooring services. It is understood that Transnet will not renew the existing lease, given their focus on the Cape Town port as a logistics rather than recreation asset. This will mean around 400 yachts requiring new berths.

While none of the designated fishing harbours have sufficient capacity to accommodate all 400 berths, there may be an opportunity to split a portion of these mooring among the existing fishing harbours.

For example, properly designed marinas harbours within the metro could accommodate the following:

- Hout Bay: additional 100 boats, although the security issues in the area will most likely preclude Hout Bay from being a viable location, considering the priority of security for most boat owners
- Kalk Bay: approximately 64 boats with change of use, although the local community had previously opposed the idea
- Gordon's Bay – no additional capacity

Outside of the metro, Saldanha Bay and Hermanus present alternatives, but are not preferred options given their distance from the city.

As an estimate, a new marine berth averages around R100,000 per berth to construct, depending on depth of water, what sort of moorings etc., indicating a required investment of around R40m to replace the 400 moorings (not taking into account other yacht club infrastructure) . Yacht club members tend to want to minimise their mooring costs (and therefore prefer low cost developments), whereas private developers

might prefer higher specification and priced developments, e.g. there has been some interest from commercial marina operators from ICOMIA in developing a new marina in the Cape.

Boating-related requirements for harbours

If fishing harbours are to embark on a boating- or yachting-related tourism strategy, the following boating tourism and recreation requirements have been identified:

- Guest moorings/berths, dinghy access (fixed or swing moorings; independent & professional marina management
- Fuel docks access (potentially subsidised fuel access for commercial and charters)
- Affordable space for personal watercraft storage
- Sheltered and pleasant waiting areas for tourists
- Access to inspection and certification services (including SAMSA annual boat certification)
- Permission to access for tourist pick up, managed facilities
- Inviting, unintimidating, open access to the harbour area and slipways (not closed/exclusive/difficult to access)
- Sufficient parking and public transport access within the harbour and in surrounding areas
- Unique local restaurants and retail
- Safe and easy to use facilities for children, families, women, first-time boat owners
  - E.g. Child-friendly walkways, padded jetties, small gaps between jetties and vessels, well managed slipways, “valet” call ahead boat launch and trailer parking

Personal non-motorised leisure craft (kayak, surfski) storage and rental

There are already various kayak and surfski tours and rentals in the Western Cape, including in Three Anchor Bay and Simonstown in Cape Town, and Langebaan on the West Coast.

Affordable and convenient storage locations with direct sea access in sheltered waters are limited (one example is Three Anchor Bay). Services such as assistance in launching and storing kayaks, along with guided trips, could also widen the market to include more women, and simultaneously provide entrepreneurial opportunities.

Harbours in locations with an existing base of kayaking activity should investigate the merits of offering storage space for kayaks and surfskis.

Photographic tourism

Harbours are very often photogenic places, and lend themselves to photographic tourism. In addition to independent photography within harbours, more organised tourism can be developed, involving specialist tours and boat-trips that allow photographers to be able to shoot from offshore vantage points.

For example, in Chichester Harbour in the UK, collaboration between a professional photographer, rigid inflatable boat company and harbour bar/restaurant has provided a day trip experience including photographic tuition and coaching, marina tour, guided boat trip, refreshments and meals. (See http://onboardphotography.com).

Photographs and galleries can also be incorporated into the harbour, including photographs of the heritage of the harbour.

Floating accommodation [52]

Floating accommodation and entertainment can provide a novelty factor and excellent views that are attractive to tourists. They can take the form of converted boats and custom-built floating buildings. The term "boatels" has been coined to describe some of these developments.

Green Turtle Floating B&B, Boston

Brooklyn Boatel

Copenhagen CPH Living barge hotel

Ole Scheeren's floating movie theatre, Thailand

The Float@MarinaBay, Singapore

However, in the Western Cape there are likely to be limited sites that are sufficiently sheltered to accommodate these kinds of developments. Additional technical investigation will therefore be required.

See also fine food and other creative industries sections for other floating venue ideas

[52] See http://www.thecoolist.com/floating-hotels-10-aquatic-escapes-of-luxury-and-adventure/;

Birding tourism

The avitourism market is one that may offer further tourism opportunities for the fishing harbours. But while there appears to be opportunity for growth in the pelagic-related tourism, the scale, however, is unlikely to be large.

The total size of South Africa's avitourism market is conservatively estimated at between 21,000 and 40,000 avitourists annually. Of this total, the number of active and potential domestic avitourists ranges between 13,000 and 24,000 consumers, who spend between R482m and R890m annually. The number of international avitourists ranges between 8,000 and 16,000, with spend between R309m and R618m annually. The market has been somewhat affected by the recession, but avid birding tourists continue to travel. Collectively, these avitourists spend an estimated R927m to R1.725bn on birding trips, support services and equipment annually.

The typical avitourist is an adult in his/her 50's in the LSM 9 to 10 categories. The trips are generally self-catered (97% of local avitourist trips are self-organized and 65% of international tourists' trips are self-organised.) Self-catering accommodation tends to be preferred by avitourists. International avitourists are more likely to use specialist birding tour operators

Pelagic birding tourism

South Africa has several breeding seabird colonies, mainly located on the country's 17 offshore rocky islands around the coast, from Bird Island in Lambert's Bay on the West Coast to the Algoa Bay Islands off Port Elizabeth –all offering themselves as potential pelagic tourism destinations.

Within the Western Cape, pelagic birding trips launch from locations such as Simonstown, Hout Bay and Langebaan. Due to the fishing harbours being a natural launch point for these pelagic birding trips, these pelagic tours should be a targeted segment of the avitourism industry for the fishing harbours.

Pelagic-related tourism also has links to the fishing boats themselves. Seabirds congregate around trawlers and longliners, creating spectacular gatherings. Following these boats can therefore yield great results for birders.

While it is important that the outfits operating from fishing harbours take full advantage of pelagic-based tourism, it should be recognised that the scale of opportunity is relatively small. There are currently only 3 major pelagics tour operators in the Cape, which may do around 25 trips per year, these tours are therefore not their only or primary source of income. Trips are very weather dependent, and must be refunded if the trip cannot take place. Operators tend to charter boats from owners licensed to carry passengers (generally between 6 and 12 passengers), and will also hire highly experienced guides (mostly ornithology professors, but in some cases previous fisherman). Due to this cost, their market is mostly international tourists and very avid and affluent local birders.

Factors that challenge increasing pelagic birding would therefore include the economic climate, high guide fees and fuel prices which push up boat tour prices, competition with a more established land birding tourism market and unpredictable and inclement weather.

Potential opportunities and birding "hotspots" related to harbours

Birding-related festivals offer a key opportunity, as indicated earlier in this section. Offshore birding could be accessed from all harbours – those with islands in close proximity offer an additional attraction (including Hout Bay and Saldanha). However, those in Cape Town are likely to offer greater opportunity because of the scale of the international tourism market and presence of experienced guides in the area. Many of the country's larger coastal lagoons and estuaries provide impressive aggregations of waterbirds, dominated by migratory waders in summer. Saldanha, Laaiplek and Struisbaai are all in close proximity to such estuaries and could potentially develop greater activity around boat-based birding trips.

The marginal economics of pelagic tourism may limit the opportunities for community enterprises. However, there might be limited opportunities for capacity building for former fishermen to serve as specialist pelagic guides. Other related opportunities could include ownership and operation of birder-friendly accommodation, and combined product development and marketing of pelagic tours and cultural tourism.

Storm watching – a potential tourism niche?

Various coastal tourism destinations around the world face similar seasonality challenges to the Western Cape, seeking to attract more visitors during the winter months.

One of the attractions used in British Columbia (Canada) is storm watching. For example, the harbour town of Tofino on the West Coast of Vancouver Island is promoted as a prime location for storm watching between November and March by the provincial and local tourism offices, as well as lodges and sea-based operators in the area, with special all-inclusive storm-watching packages being offered. Whilst many packages promote watching the storm from the comfort of luxury accommodation or sea-facing restaurants, others promote the adventure tourism aspects, including guided coastal walks and boat charters from Vancouver and Tofino (with safety considerations taken into account).[53]

Locations such as Kalk Bay already experience some informal storm watching and photography, but this could potentially be explored in many of the harbours as a niche tourism offering to promote.

Kalk Bay during a storm**, photo by Maria Wagener**

[53] For example, see http://www.tofinotime.com/activities/tofinostormwatching.htm

5.6 Fine food

Value chain overview

The agriculture and agro-processing value chain, including food and beverages, is a dominant activity within manufacturing in the Western Cape, with primary and secondary industries together contributing around 10% to provincial Gross Value Add, and a GDP contribution of around R23bn (note that this also includes forestry and fisheries within the agricultural definition). It is also a major contributor to the Western Cape's exports, contributing close to 37% of the province's exports between 2005 and 2010, and accounting for over 50% of the export growth between 2000 and 2010.[54]

Fine food forms a small but high value sub-set of this activity. As defined by the Western Cape Fine Foods Initiative (WCFFI), these are "foods and beverages that exemplify quality, innovation and style in their category. Their specialty nature derives from some or all of the following characteristics: Their originality, authenticity, ethnic or cultural origin, specific processing, ingredients, limited supply, distinctive use, extraordinary packaging or specific channel of distribution or sale. By virtue of their differentiation in their categories, such products maintain a high perceived value and often command a premium price." The differentiation of these products enables Western Cape producers to not only succeed in the domestic market, but also to successfully enter export markets. WCCFI had 115 members as at August 2012, including products such as fresh produce, baked goods, oils, olives, spices, sweets, chocolates, vinegars, beverages, and associated services.

The diagram below provides a simplified description of the fine food value chain, showing the two main routes to market – retail (whether deli, market, specialist shop or supermarket) or restaurant or similar "eating experience". Note that the value chain is not necessarily driven by access to raw materials, but could be driven by product development or a marketing concept.

Figure 105: Fine Foods value chain

Sources of value add

Value add in this sector is driven by:

- Quality
- Origin of inputs or product (including in some cases unique origin inputs such as rooibos, or formal geographical indications for inputs or finished products; in some markets and niches, local origin can also be important e.g. within a 50km radius)
- Product innovation and recipe development
- Branding and marketing (including association with celebrity chefs or personalities)
- Packaging and/or presentation, including both aesthetics and functionality
- Certification, including compliance with Hazard Analysis and Critical Control Point (HACCP) system requirements, as well as market or buyer-specific certification requirements

Locational requirements

At present, around 80% of the W Cape Fine Foods Initiative's members are within the Cape Metro, but including various locations across the peninsula.

[54] Provincial Government of the Western Cape (2011) Provincial Economic Review and Outlook

Various factors inform locational decisions of fine food companies. In some cases, it may be important to be close to raw materials e.g. for olive and wine producers. In other cases it may be more important to be close to the market or export infrastructure e.g. the specialist chocolate, coffee and herb/spice producers in Cape Town and the Winelands.

Fine food restaurants have particular requirements, including easy access for clientele and staff, parking, security, hassle free surroundings (clientele not being harassed on entry or exit) and, in some cases, a "character" building or environment. Views, including sea views are also an advantage.

Role of fishing harbours

The main role of harbours in relation to the fine foods value chain at the moment is restaurants, with a particular focus on seafood, although this is not necessarily sourced locally. Harbours such as Hout Bay, Kalk Bay, Laaiplek, Hermanus and Gordon's Bay have numerous restaurants catering for diverse markets, whilst smaller harbours may have only one restaurant e.g. Lamberts Bay, Struisbaai.

Some harbours also have fish sales, whether formal or informal e.g. Saldanha fish shop, Kalk Bay fish stalls. In a few cases, other local produce is available e.g. pickles in Gansbaai. Hout Bay harbour also has a successful weekend food, goods and live entertainment market (Bay Harbour Market) just outside the DPW precinct. This market attracts thousands of visitors each weekend.

Some community-based restaurants are already in operation, e.g. Kassies Kove community restaurant in Kassiesbaai adjacent to the Arniston harbour. Another model is community shareholding in the established restaurants, as has happened in the Kalk Bay case. However, in other cases communities have struggled to create sustainable business restaurant enterprises, with particular challenges around seasonality e.g. members of the Lamberts Bay community had a restaurant on Bird Island which did not generate sufficient revenue to stay open, in part due to seasonality, but also apparently because potential clientele were put off by the entry fee into the area, which is managed by Cape Nature. Other harbours used to have restaurants, but these have closed and not re-opened, as in the case of Stilbaai and Saldanha small fishing harbour (Pedro's Fish market and Restaurant).

Harbours are logical localities to promote the diversification of seafood products, which in turn provides an economic opportunity for local fisher communities. South African seafood menus tend to offer a narrow range of standard products and there is great scope for seafood product innovation ranging from traditional Cape seafood products (e.g. smoorsnoek, bokkoms) to African fish dishes to various international products, and innovations such as tuna biltong. Australia successfully promoted its seafood product diversity through a programme named "Seafood Australia" which provided start-up subsidies for SME's developing innovative seafood products.

Constraints to value chain development

There are various challenges to successful growth and development of the value chain, and enterprises within it. One key challenge is compliance with food health and safety standards by small businesses, which can be costly to implement and impose onerous compliance procedures. WCFFI is investigating common use spaces that are HACCP compliant, and lobbying for exemptions on food safety and labelling requirements for home-based or "cottage industry" producers in low risk food categories such as jams and pickles (as has been successfully achieved through the California Homemade Food Act).

Market access is another key challenge, in particular for small producers, as large retailers may require listing fees, require large and reliable volumes to be supplied to national or regional distribution centres, and have long payment cycles. There is also significant competition to supply

restaurants and their distributors. The cost and complexity of cold chain management can also be an issue for producers of perishable products.

Opportunities to value chain development[55]

Numerous possible opportunities exist to support the fine foods value chain within harbours. A key role could be in increasing market access and exposure for small local and community producers. This could include restaurants, stalls, markets, home industry/*tuisnywerheid* and delis, as well as provisioning for boat-based tourism. In order to realise this opportunity, however, the challenges of seasonality of demand (and limited scale of demand in some locations) will need to be addressed, which may require some creative solutions e.g.

- Focus on non-perishables in off-peak season e.g. small delis
- Labour intensive processing e.g. large anchovy into Mediterranean products, smoked products.
- In-season farm stall equivalent / "harbour homemade"
- Markets during peak periods
- "Taste of Cape Town" style mini festivals
- Temporary floating restaurants
- "Pop-up" restaurants or gourmet food trucks, already an international trend that is starting to take off in Cape Town
- Boat-based vendors

Helsinki, Finland boat food
Source: http://familystyles.wordpress.com

BBQ Donuts, Germany
Source: weburbanist / http://www.bbq-donut.de/

It may also be necessary to facilitate access for local producers to restaurant supply chains, and assist them to comply to with quality standard, reliability and price requirements.

In terms of fine food promotion, harbours present a key opportunity to showcase the capabilities of the fine food industry to domestic and international tourists in an attractive and amenable environment. Responsible community-based fine food production, particularly seafood products, should also be promoted. Over and above the restaurants, markets and retail, initiatives could include tastings, samples, food festivals and co-promotions with other luxury brands active in the harbours e.g. boating, high-end tourism.

[55] Please also refer to the fishing value chain for related opportunities.

Requirements

In order to help realise these opportunities, harbours may need to:

- Provide for facilities that support enterprises to serve different markets from low end through to higher end e.g. fresh and processed fish stalls that will help vendors to secure value from higher-end customers
- Provision of range of sizes of lease properties (or accommodation of sub-leases within a larger space).
- Affordable lease rates
- Try to find a way to accommodate seasonal leases (with alternative uses during off-peak)
- Enable use of parking and moorings for food-related sales
- Ideally, support cold chain facilities and multi-user HACCP compliant environments for food preparation
- Support the branding and marketing of fine food in the harbour and surrounds
- Provision for sufficient parking and public transport access
- Creating a welcoming and inviting initial impression on entering the harbour, and providing good security during both the day and evening (as opposed to access control that does not have a clear purpose and limited security, in particular at night)

5.7 Crafts

In this section, a synopsis of the value chains for arts & crafts ("**A&C**") in the Western Cape is presented, followed by a summary of value chain opportunities which could be used to develop economic opportunities linked to fishing harbours.

Value chain overview

Limited reliable statistics are available on the crafts sector; using the Cape Crafts and Design Institute (CCDI) database and TIPS extrapolations as a base, it can be estimated that there are over 2,000 enterprises in the sector in the Western Cape employing over 13,000 people directly (with employment including associated retail and service possibly reaching over 20,000), and an estimated turnover of over R100m (turnover based on 2000 data, which could have increased significantly since then).

The diagram below provides an illustration of the crafts value system, including both the supply chain and the enabling environment or support systems.

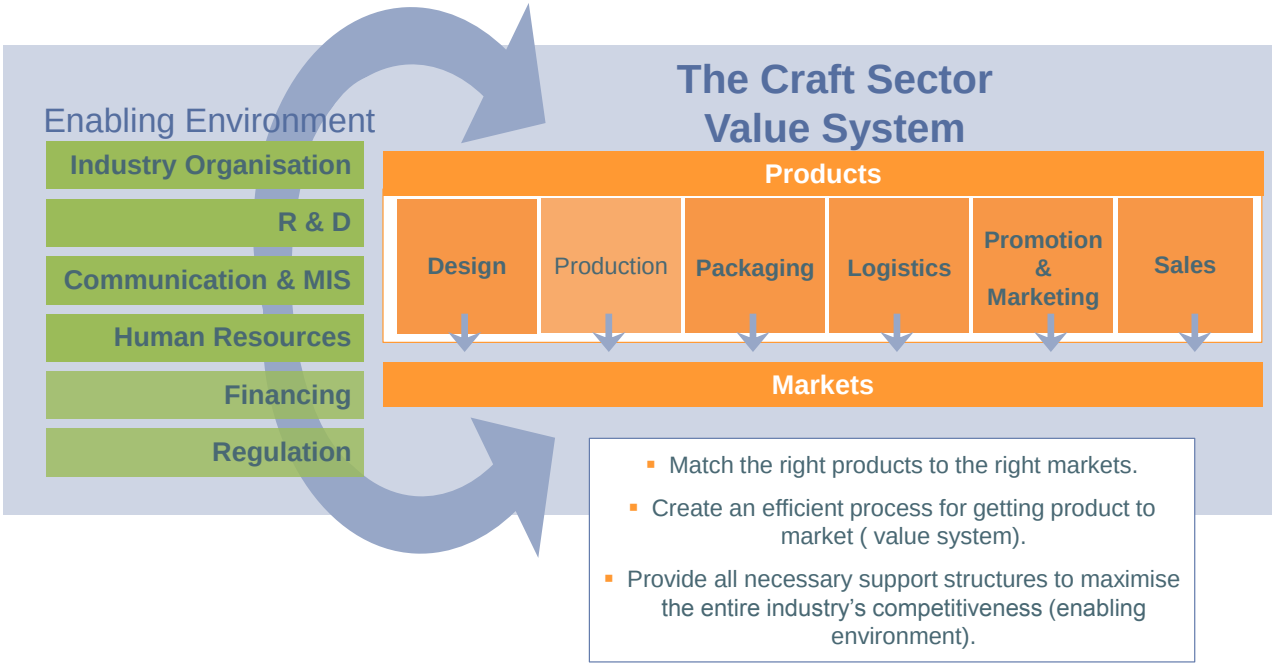


Figure 106: Arts & crafts value chain

Sources of value add

Sources of value add within crafts include the following:

- Design and innovation in product development and production process
- Product uniqueness
- Marketing and branding
- Reputation of the artist/artisan/maker
- Responsible production e.g. community benefits, use of recycled materials

Locational requirements

Craft production locations tend to relate to ease of access and affordability for the craft producer, with production often happening within the home for smaller producers.

In terms of crafts retail, locational considerations are primarily driven by likely market volumes and suitability, as well as affordability of the location. Suitable locations will also depend on the target

market for the craft production (locals or international tourists, low or high-end product). Municipal by-laws for informal traders may affect where crafts traders can locate. Craft product is also retailed through organised craft markets and festivals. Craft producers may either retail their products directly, or through agents, distributors and specialist craft retailers. Art product is often retailed through specialist galleries, although some is also informally traded (where art overlaps with craft).

Current distribution of activity in the crafts value chain is strongest in the metro area. The CCDI's database of producers has 4,673 members (including individuals, sole traders and companies) as of 05 September 2012, of which only 748 are outside of the metro, distributed across the regions as shown in the table below.

Table 42: Regional distribution of CCDI members outside of the metro

Region	Number of members on CCDI database
Eden	299
Karoo	53
Overberg	124
West Coast	101
Winelands	171
Total	**748**

Of these regions, the Overberg and West Coast are most relevant to the fishing harbours, although Eden is somewhat relevant to Stilbaai given the market links with the Garden Route.

Role of fishing harbours

Arts and crafts activities in the 12 proclaimed fishing harbours are relatively limited:

- Hout Bay harbour has the largest craft trading activity, with craft from across Africa sold within curio shops and by informal traders
- Lamberts Bay currently has a few crafts stores in or around the harbour.
- Kalk Bay harbour has a small arts stall selling paintings underneath the Polana restaurant, as well as informal crafts traders walking around the harbour (with other art and craft available in Kalk Bay more widely)
- Laaiplek has a small curio section in one café
- A limited amount of craft is produced and retailed in Kassiesbaai in close proximity to Arniston harbour
- Gordon's Bay has a small amount informal craft trading (which is apparently tied on an agreement with an individual to also provide security services to the harbour)

Figure 108: Art vendor in Kalk Bay harbour

Figure 107: Craft retail in Hout Bay harbour

The Commercial Arts and Entertainment division ("**CAE**") of DEDAT is currently involved in the Hout Bay harbour. CAE is participating in the Hangberg Project and has identified a group of women living in Hangberg to produce products that give an impression of Hangberg. CAE is

currently looking for a venue to host the Hangberg women as the initial identified building in Hout Bay was not suitable and the division a permission from DPW to rent a building is pending.

CAE has three training programs in place:
1. Goldsmith programme: training ten goldsmiths within the Hangberg community;
2. Ceramic programme; and
3. Arts: visual and performing arts and products relating to Hangberg

In respect of the training programmes above, DEDAT is working closely with MINTEK, a leading South African provider of minerals processing and metallurgical engineering products and with Cathsseta, the Culture, Art, Tourism, Hospitality and Sport Education and Training Authority.

MINTEK assists the local craft producers with a three year programme consisting of training, innovation, input, etc. how to bring their products to the markets (logistics, promotion and sales).

Furthermore, DTI, CCDI, DEDAT, DAC all have market access programmes, design and innovation programs and mentoring and marketing programs for local artisans.

If artisans want to sell their products at markets, CAE creates a cooperation that sells and markets the products. CAE only facilitates an enabling environment and does not have a proactive role in establishing cooperatives among artisans.

SABS, the South African institution for the promotion of maintenance of standardisation and quality in connection with commodities and the rendering of services[56], performs the quality control of the products and predicts market trends. SABS has mandated CCDI to perform the marketing control and link in to market trends.

Constraints to value chain development and harbour requirements

Some of the challenges to crafts growth and value chain development include:
- Lack of product innovation and design by some producers (relying just on traditional products or methods), including lack of uniqueness of product offered in local areas
- Poor or inconsistent quality by some producers
- Large numbers of small producers with limited scale and often weak business skills / management of operations and pricing
- Multiple stakeholders involved in supporting the sector which need to take coordinated action
- Trust issues among producers and vendors, including tensions between local craft producers and vendors of other African product e.g. in Hout Bay

In order to address some of the challenges and realise opportunities for handcrafts within harbours, likely requirements are:
- Clear planning on locations for crafts retail and, in some cases production, within harbour precincts
- Affordable spaces (ideally including flexibility to use retail or market spaces only during peak seasons in the lower volume and highly seasonal harbours)
- Clear linkages with tourism planning
- Coordinated strategies and actions to provide support to initiatives across role players, including local government, CCDI, DEDAT, national government, as well as civil society organisations and donors involved in the sector

[56] https://www.sabs.co.za/About-SABS/index.asp

Opportunities for crafts development within harbours

There appears to be significant scope for increased local craft retail within harbours, if challenges of seasonality and volume of demand, as well as affordability of space can be addressed. Harbours could be a key access point for retail for domestic and international tourists. However, this activity is not directly tied to marine access, so it is not essential to locate within the harbour (other sites that can attract tourist volumes could also be suitable).

The specific visitor profile of each harbour will inform the most suitable approach e.g. retail through festivals during peak seasons, regular markets, informal traders or permanent formal retail. Given current visitor numbers, the most viable locations are Hout Bay, Kalk Bay and Hermanus (in the case of Hermanus there is no current base of crafts activity, and no buildings in the tourist area from which to operate; temporary structures could be . Smaller initiatives may be possible at other harbours, in particular during peak season (e.g. Gordon's Bay, Struisbaai, St. Helena, and Laaiplek). In order to increase tourism feet, WESGRO and DEDAT are currently writing a proposal to present new routes to the Hop-on-Hop-off bus. These routes would include the harbours of Kalk Bay and Gordon's Bay to the Cape Town routes.

In some cases where more space is available, it may also be appropriate to produce crafts on site (e.g. Hout Bay), in a workshop-type production and retail environment that increases the attractiveness of the product offering to the tourist.

A particular opportunity for crafts in fishing harbours could be producing products linked to fishing heritage, aquaculture and recycled materials e.g. the recycling of former fishing nets (DEDAT is working closely with the recycling initiative *Too Good to Waste* and this recycling initiative could be applied to any harbour to produce A&C from recycled fishing nets or shells).

5.8 Other creative industries including film, performing arts, visual arts, music

Value chains overview

Creative sectors such as film and performing and visual arts have quite different value chains from most manufacturing and service sectors, given the incorporation of the creative process, and different mode of "delivery" to the market.

Examples of film and performing arts value chains are set out below.

Figure 109: Film sector value chain

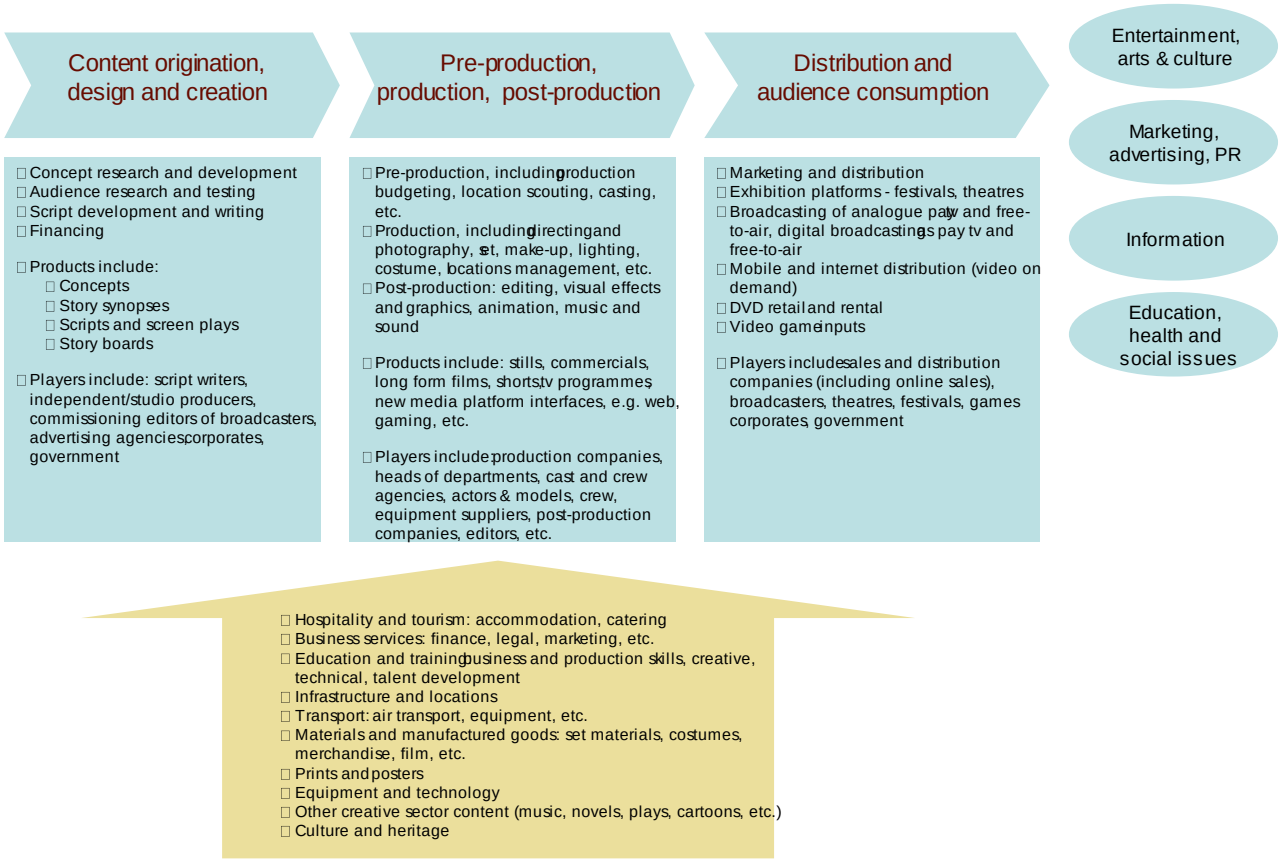
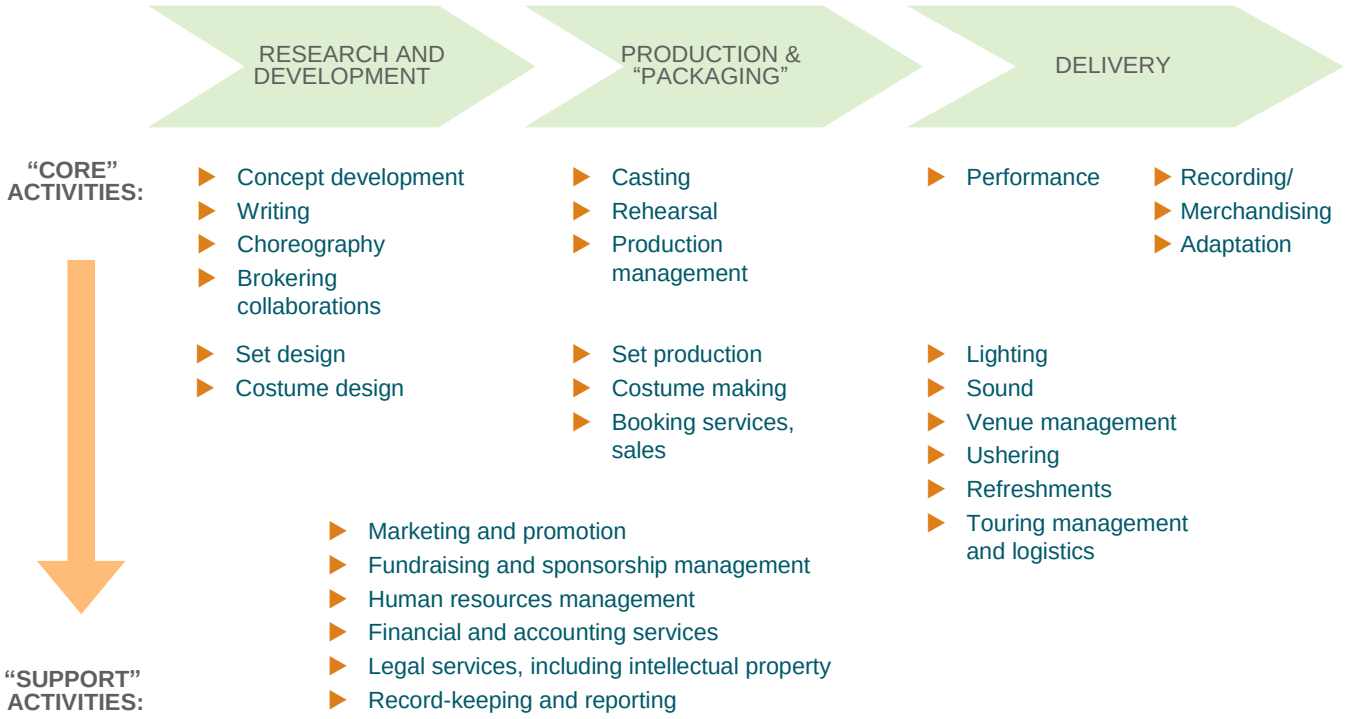


Figure 110: Illustrative production chain for the performing arts



These sectors are relatively well established in the Western Cape, although not at the scale of some other creative industry hubs such as the Netherlands or South Korea.

Scale estimates of the film sector in the Western Cape are as follow[57]:

- Turnover: estimated at R2.56bn (2005/06), 77% of which is in Cape Town
- Contribution to GDP: R3.5bn (2005/06)
- Number of companies (estimate based on The Whole Lot directory):
  - Production companies: 13
  - Post-production companies: 87
  - Crew agents: 10
  - Cast agents: 12
  - Model agencies: 24
  - Artists agents: 10
  - Animation facilities: 8
  - Location agents: 4
  - Digital stills post production: 2
  - Editing services: 12
- Number of public space shoot days: 2,539 in 2009/10

Reliable data on the size of the performing arts sector (including theatre, dance, live music, comedy and circus) in the Western Cape is not available, but estimates based on the MEDS performing arts strategy paper are as follows:

- People involved directly in the sector:5,000 (many on a freelance basis rather than being employed)
- Over 40 performance venues (excluding school and community hall theatres)
  - Of these, at least 10 are outside of the metro

[57] Cape Film Commission (2011) Draft film sector strategy

- Around 30 performing arts festivals (in addition to exclusively music-based festivals), including festivals in the harbour towns of Lamberts Bay and Hermanus)

Sources of value add

The film industry is a highly competitive internationalised industry. Value add can be secured through:

- Offering exception and speedy service
- A diverse range of locations and skills in close proximity to each other
- Having unique stories to tell

In the case of performing arts, sources of value add include:

- Ability to deliver a unique offering
- Brand recognition by audiences: a combination of well-known writer/choreographer, branded performers or celebrities, and trusted venues
- Creative excellence
- Audience size and extended runs of shows (however, in practice this may be difficult or inappropriate for some types of productions in the Western Cape context)
- In the case of international tourists, choice of a location that is either appealing to tourists as a venue (e.g. outdoor venue, historic site or building), or already frequented by tourists for other reasons (which could apply to harbours)
- Strong marketing

Locational requirements

In the film industry, proximity and speed of access is critical – trips requiring overnight stays add significantly to crew costs as they are considered an "away shoot" – this is particularly the case for stills and commercials, and less so for long-form feature film shoots. There is therefore a preference for locations that offer diversity and accessible within short driving time. Other considerations are being eco-conscious, good quality of light and long summer daylight hours (which is a strength of the Western Cape)

In the case of the performing arts, access to sufficiently large and arts-aware audiences is a key issue in terms of the performances themselves, whilst workers in the performing arts tend to base themselves in areas that can provide access to networks and are creatively inspiring.

Role of fishing harbours

Within the film sector, fishing harbours are already used in location shoots, either for harbour and boat scenes or for marine access. There are specialised service providers such as Marine Scene and Frog Squad who help secure access to marine and boat-based locations. The metropolitan harbours are more regularly used, in particular Hout Bay.

Under the current system, permission to film must be obtained from Harbour Users Committees and Harbour Steering Committees. Film industry input is that at present this is expected to take at least one month because of meeting schedules for these structures.

At present, there is a limited role for the fishing harbours in terms of performing arts given the limited number of events taking place within the harbours. The exception is informal performances (as take place by minstrels in Hout Bay) or performances during festivals.

There is also limited activity in the visual arts within the harbours at present, with the exception of photographers independently photographing within the harbours, and visual arts and photographic displays (including historical photos) within restaurants and clubs within and near the harbours.

Constraints to value chain development and harbour requirements

The requirements for the film industry are mainly related to ease of access, both in terms of physical access and obtaining permissions. In terms of obtaining permissions, this would need to be far more rapid and reliable than at present in order to encourage filming within harbours – at present it is a deterrent. Ideally this decision making would be localised.

In terms of physical access for film, assistance may be required in moving the mooring of regular moored boats. Parking for the unit and crew parking is also a requirement, and is currently a constraint in some cases – parking permission for technical vehicles is not always granted. Access to power cabling is often required. Challenges are also experienced in gaining exclusive access to an area of the harbour during film shoots, or a "closed set" for security reasons, as this is often seen as overly disruptive of other activities in the harbour.

For the performing arts, major requirements are suitable and affordable venues (generally including stage, seating, lighting, sound systems etc.), as well as parking and ease of access. Depending on the nature of the production and length of the run, different size venues are required into order to be profitable. Outdoor venues can have some appeal, but are very weather dependent.

Opportunities for development of other creative industries within harbours

A direct opportunity for the visual arts exists in the harbour redevelopment by incorporating the unique heritage and traditions into the fabric of future developments in the harbour, including through visual arts and photography.

Opportunities exist to promote harbours as film locations if access issues are addressed and systems are put in place to manage how filming interacts with other harbour activities.

In addition, ideas have been raised about specific opportunities to explore around:

- Location to moor a boat that creates the appearance of shooting at sea - (180° to 270° open view)
- Deep water pool for shooting underwater scenes

In terms of content development, harbours and their surrounding communities may also offer unique stories to inspire either documentaries or features, whether local or co-productions. Film and commercials/stills could also present an opportunity to raise the profile and brand of harbours.

In terms of performing arts, there seems to be a virtually untapped opportunity to utilise the harbours as performance venues if suitable flexible/temporary venues can be developed and event access can be streamlined. Harbours could become iconic venues that offer distinctive experiences for both locals and tourists. This is likely to require a partnership with existing performing arts companies and marketing agencies in the province, and could also form part of a wider festival strategy for harbours; international collaborations might also help raise the profile of events.

The attractiveness of harbours as venues could also be enhanced through development of innovative venues, as illustrated in the images below[58].

[58] http://www.visualnews.com/2012/04/06/thailands-floating-movie-theater/

Ole Scheeren's floating movie theatre, Thailand

The Float@Marina Bay, Singapore

Bregenz festival

Handa Opera on Sydney Harbour

However, in the Western Cape there are limited sites that are sufficiently sheltered to accommodate these kinds of developments, so further technical investigation would be required.

The Handa Opera promotion[59] demonstrates the potential appeal of harbours as a venue, and how greater benefits can be secured by integrating with the service offering of the areas.

"Handa Opera on Sydney Harbour will take your breath away. From the moment you enter the magical harbour-edge setting, take your first sip of champagne and look across the astonishing floating stage at one of the world's most beautiful cities, you'll understand why images of the spectacular first production were beamed across the world and why critics and audiences were in raptures.

… Come early and soak up the atmosphere as the whole precinct is transformed into a Spanish fiesta, with tapas bars and restaurants offering a wide range of pre-performance drinking and dining options."

See also fine food and other creative industries sections for other floating venue ideas.

Boat-based festivals and parades could also represent, following international examples such as the Seattle Christmas boat festival[60] or Victoria Symphony Splash (see images below)[61]

[59] http://www.operaonsydneyharbour.com.au/about
[60] http://seattle.cbslocal.com/2011/11/13/best-of-christmas-ships-for-the-holidays/
[61] http://yourstyleyourway.ca/blog/victoria-symphony-splash

5.9 Value chain and harbour linkages

There are numerous links between value chains that can be supported through harbours. Many of these value chains come together in terms of market access and retail – whether through shops, restaurants, stalls, markets are other forms of market access. The line fish, lobster and aquaculture value chains all have links to fine food (in particular in terms of fisher community opportunities), which in turn have links to tourism. Boatbuilding has strong links to tourism in tourism of boating tourism (whether charter-based, sport or recreational self-owned yachts, power boats and personal water-craft. Boating also has links to fishing in terms of fishing boat manufacture, repair, maintenance and refit, as well as possibly in terms of sea-based aquaculture and abalone ranching boats for staff transport and security. Boating and fine food could be linked through provision of vessels, as well as restaurants, markets and food retail more widely. Handcraft has links to cultural tourism, as well as to fishing traditions and recycled materials such as nets (possibly also aquaculture by-products such as shells). The visual and performing arts have links to cultural tourism, as well as to festivals and events.

There are also some tensions between value chains. There is possible competition for space or marine access. Another tension is between industrial fish processing and most of the tourism and recreation-related value chains, in particular around fish smells from factories, but also in some cases around water quality or pollution from the factories.

The diagram below attempts to illustrate these linkages.

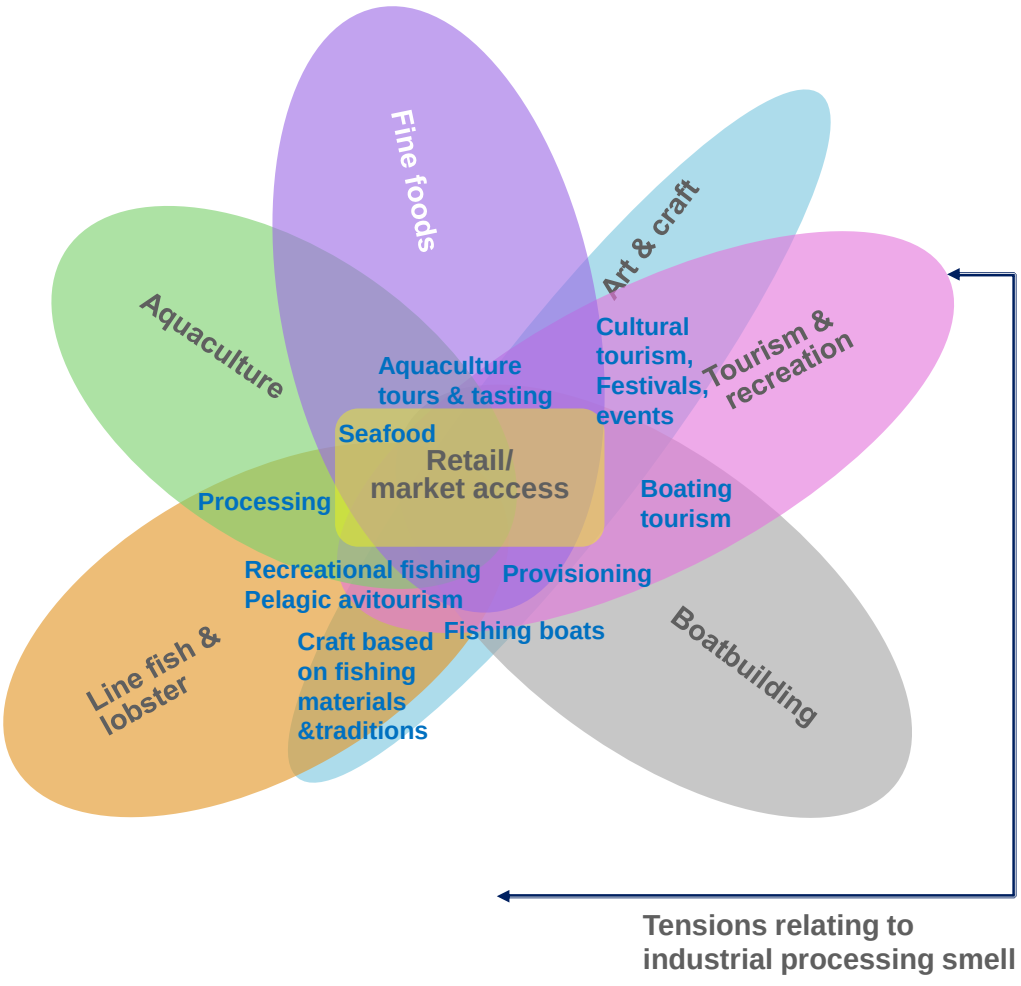


Figure 111: Value chain linkages

Similarly, there are linkages between harbours – within and between value chains that need to be optimised. Some of these include:

- Industrial fish processing: dealing with the socio-economic impacts of the consolidation trend (which may potentially result in reduced activity in harbours such as Laaiplek and Hout Bay but may increase activity in St Helena, and Saldanha)
- Aquaculture processing and service nodes. For the growing aquaculture sector. The industrial land at Hermanus, Gansbaai and Saldanha and St Helena harbours is most suitable for services and processing.
- Small scale fishing (line fishing, abalone, and rock lobster) service nodes. St. Helena, Hout Bay and Gansbaai might be suitable to serve as service hubs. Fishing harbours could also jointly participate as essential infrastructures for a "sustainable community caught fish" brand and campaign.
- Fishing harbours as a community focal point amenity. For harbours adjacent to traditional fishing communities, creative ways can be explored to maintain the cultural functionality of harbours (but avoiding turning them into museums). For example, enhanced local fisher community involvement in harbour fish markets, home industry scale seafood products, retail and restaurants, events hosting, water sport development activities, boat repair and recreational charter. This applies to all harbours, but particularly those with reduced fishing activity and growing numbers of tourist "feet" such as Lamberts Bay, Kalk Bay, Hout Bay, Hermanus, Struisbaai, and Stil Bay.
- Dealing with tourism seasonality – potentially encouraging routes from harbours less affected by seasonality (e.g. Hermanus) to other harbours by means of events and other attractions
- Sailing and power-boating routes – supporting joint marketing and differentiated product offering across harbours within proposed sailing or power-boating routes (including varied crafts, food, entertainment, cultural experiences etc.)
- Fine food: potentially harbours could showcase not only the produce from their own regions, but also that from other harbours, possibly under a common brand or retail concept (which could help increase exposure and market access for the smaller harbours and their communities and reduce the challenges of seasonality of local demand)

6 Identification of opportunities and constraints

While the primacy of fishing as the key purpose of fishing harbours is acknowledged, over the years most fishing harbours have evolved into multi-purpose access points to the sea for a variety of activities. Thus, optimisation of the economic opportunities linked to fishing harbours requires an expanded vision of their role to include other economic opportunities.

As fishing harbours are a public good with prime sea front property, a range of private sector commercial opportunities present themselves, but priority should be given to optimising the socio-economic benefits that can be unlocked through activities which promote:

- Access to sea based activities, particularly nature based activities such as whale watching.
- Local economic development both within the harbours and the surrounding hinterlands.
- SME opportunities, particularly for disadvantaged communities.
- Local community development, empowerment and equity.
- Support implementation of the small scale fishing policy, particularly fisher access to value chain opportunity beyond the primary fishing operation.
- Geographical linkages to promote economic activity e.g. tourism routes.

The DAFF (2008) report on fishing harbours produced a useful zonation scheme which prioritises the location of activities within fishing harbours according to their requirement for proximity to the sea. Activities primarily dependent on harbours as access points to the sea receive priority, for example, fishing, aquaculture, and charter vessels. Other service, industrial, tourism or SME activities should be zoned further back.

In order to optimise the socio-economic benefits that can potentially accrue from developing fishing harbours as local economic development nodes, each harbour needs to viewed in its local economic development context, and strategies for unlocking opportunity developed accordingly. This of necessity requires alignment with economic development needs and strategy at local and regional level.

An initial stocktaking and diagnostic analysis based on visits to the fishing harbours and stakeholder consultations revealed that fishing harbours can broadly be categorised according to the primary activities in the harbour, visibly, industrial fishing, small scale fishing, tourism and other activity, or a combination of the above (Table 1). The primary harbour activities, or combination of activities, will naturally shape the opportunities and value chain development strategies for each harbour. In general, the initial survey revealed a decline in fishing activity, with a rise in tourism and mixed industrial activity including aquaculture, seafood processing and service businesses.

In the section below, the priority opportunity areas for fishing harbour economic development are listed with constraints and requirements for unlocking this potential. A detailed overview of the status and potential of each harbour is presented in Appendix 1 of the report.

6.1 Overall opportunities and constraints

The main findings of site visits and consultations at the 12 fishing harbours are summarised in the SWOT analysis below.

Strengths	Weaknesses
Major public asset which is critical infrastructure for the fishing industry, recreational boating, aquaculture and sea based eco-tourism.	No policy on fishing harbour use which recognises the *de facto* multi-sectoral use. This has resulted in inappropriate governance arrangements.
Available land and buildings in most harbours (Lamberts, St Helena, Saldanha, Hout Bay, Gansbaai, Stilbaai)	Weak governance institutions have impeded development and promoted commercial opportunism and user conflict. Local disadvantaged groups feel marginalised from the benefits of the facilities and harbour users and potential investors feel powerless to address the problems. The lack of transparency, participation and equity in harbour governance has created conditions conducive for corruption.
Effective harbour management: Gordon's Bay, Hermanus, Gansbaai,	Dysfunctional, ineffective or inappropriate harbour management at most harbours. Management organisation does not address most harbour user and local community needs.
Fishing communities with strong traditions and identity at Laaiplek, St Helena/Saldanha, Hout Bay, Kalk Bay, Struisbaai, Arniston, Stilbaai	Small scale fishing communities have limited involvement in most harbours. Lack access to shore based facilities for processing, value adding, retail opportunities in the sea food/ tourism value chain. Lack of development support for promoting small scale fisher SME's.
Current or recent DPW infrastructure maintenance (incl. Lamberts Bay, Saldanha Bay, Kalk Bay, Gordon's Bay, Hermanus, Gansbaai and Stilbaai)	Many serious facility maintenance problems. High levels of sand in Laaiplek, Gordon's Bay, Gansbaai and Struisbaai. Sunken ships in Saldanha Bay and Hout Bay
Some harbours are local tourism hubs (Lamberts Bay, Hout Bay, Kalk Bay, Struisbaai, Gordon's Bay)	Seasonality of tourism: not enough tourist feet in most harbours to support year round activity
	Weak harbour security discourages harbour use and good maintenance and results in theft, damage and losses in some harbours (Hout Bay, Saldanha) – DAFF access control only during office hours, jurisdictional concerns inhibit police presence within the harbour
	Fish smell in harbours Gansbaai, Laaiplek, St Helena Bay and Hout Bay an ongoing conflict between industry and local residents
	Current short-term (1 month) DPW leases (stated to continue until finalisation of master plan) for harbour property is a major

	constraint to investment and commercial activity
	Mandated national government departments considered untransparent and inaccessible to many local stakeholders and unresponsive to user needs (seems to be worse in cases where there is no active local harbour master to serve as a conduit). Ernst & Young strategic harbour study not released, no comment by Departments. Proposed DPW major spatial development plan for harbours not informed by policy, stakeholder inputs, local and not aligned with provincial government economic development strategies and plans.

Opportunities	Threats
Strategies to link fishing harbours to tourism sector. Possibility of a "fishing harbour route"	Weak governance, institutional failure and unresponsive, autocratic bureaucracy
Create SME opportunities for small-scale traditional fishers by means of shore based facilities, access to processing and retail levels of the seafood value chain and linkage into tourism value chain	Crime a threat to Hout Bay harbour and potential threat to Kalk Bay harbour
Enhance harbour facilities for recreational boating and eco-tourism sea charter operations	Decline of traditional small scale fishery resources
Harbours as venues for events	

Table 43: Stakeholder views on strengths, weaknesses, opportunities and threats 12 harbours

Moving forward, governance arrangements for harbours need urgent primary attention. While the two mandated national departments (DAFF and DPW) remain silent on governance arrangements, their documents and studies indicate that both accept harbours are now multi-use public good facilities which should promote local economic development for maximum socio-economic benefit to local communities. It is understood that the Treasury has been tasked with recommending organisational arrangements a dedicated entity to be responsible for fishing harbour management. The broader governance and institutional arrangements still require discussion and agreement by stakeholders. In order to effect this, integration of harbour governance into provincial and local government economic development planning and legislation is required. This is provided for in the Constitution and simply needs to be legally enforced through an intergovernmental negotiation process. A fishing harbour policy is required to guide government in this regard and the DEAT 2008 harbour study drafted by Ernst and Young and SAHA international provides governance principles and management model options for obtaining maximum socio-economic benefit from fishing harbours.

6.2 Opportunities and constraints for groups of harbours

This section provides a brief characterisation of the opportunities and constraints for each grouping of harbours. An assessment of likely harbour-specific opportunity areas is dealt with in Section 6.3.

6.2.1 West Coast

Tourism and recreation opportunities on the West Coast need to be achieved in a manner that is suitably scaled to the smaller volumes and seasonality of demand. It is logical to integrate harbours into existing tourism routes, events, and promotions.

There are opportunities to showcase and celebrate the unique West Coast culture and its strong ties to fishing communities and the sea.

Saldanha Bay can serve as a hub for sea-based aquaculture.

The West Coast is also a possible hub for fishing boat recapitalisation.

The area is also likely to continue to serve as a pelagic fishing hub.

6.2.2 Metro

Of all the harbour groupings, the metro harbours have the advantage of a larger market in close proximity, both through higher resident numbers, as well as higher tourist visitor numbers. This means that they have a far greater chance of expanding tourism, food and retail activity, including in some cases on a year-round basis rather than just in the tourism season. Similarly they are more accessible for film shoots, performances and events throughout the year.

This scale and proximity to a large population also means these harbours are more likely to secure critical mass for boatbuilding and repair activities.

Challenges for these harbours include the scale of need for job creation and enterprise development in their surrounding communities, which place high expectations on the potential contribution of the harbours.

6.2.3 South Coast

The South Coast is likely to continue to be the hub for land-based aquaculture, in particular abalone, and hopefully be able to attract significant growth.

The South Coast harbours form a logical coastal “harbour route” which could be packaged as a tourist offering, as well as continuing to serve as hubs for local community life.

6.2.4 Overview of potential opportunities for communities

In all cases, opportunities will be dependent on the scale of the market and local capabilities, but areas to explore could include:

- Fish retail/market operators
- Home industry traditional value added fish products
- Cultural hubs for fisher folk suitable for featuring historical themes in design and displays.
- Restaurant and deli/ market operators / stall operators

- Aquaculture operations co-owners, service providers (e.g. feed, inspection, repairs, employees
- Provisioning of boat charters and sailboats/powerboats
- Boat repair and cleaning – business owners, workforce
- Boatbuilding workforce
- Personal watercraft hire and storage
- Caterers e.g. for film shoots and events
- Co-owners and managers in some cases where all parties are willing– taking a shareholding in existing operators (as per Kalk Bay example)
- Craft production and retail
- Event organisation , festival participation
- Performers – music, dance, theatre, storytelling, etc.
- Public transport operators (as with Lamberts Bay kreef shuttle service)
- Parking operators and employees
- Tourism: Boat charter operators or employees, specialist guides, aquaculture tours and tastings
- Community-based accommodation in close proximity to harbours e.g. Arniston

Support required to enable community involvement:

- Structuring of access to spaces to promote community participation e.g. initial voucher system, cross-subsidisation with larger operators
- Enterprise development support
- Capacity-building / skills development
- Access to finance – capital investment, working capital?
- Marketing support to help secure a premium e.g. community caught fish, unique local products
- Support for standards compliance e.g. fish processing licenses, food safety compliance

6.3 Opportunities and constraints per harbours

6.3.1 Lamberts Bay

The harbour of Lamberts Bay and its surrounds have several tourist attractions. The harbour is however far (254km) from Cape Town creating seasonal and small volume tourism. Tourists tend to visit the harbour mainly in summer; a period that the harbour should leverage off with more activities and events. A cohesive and well organised community provides a receptive environment for developing harbour based economic opportunities

Identification of priority of opportunity areas

- High end tourism opportunities linked to regional routes and specialities (e.g. floating restaurant / hotel/ yacht or floating accommodation). Bird Island, Isabella's Restaurant and the craft shop already attract tourists
  - The current and planned investments in Bird Island - which make it one of the best and most accessible seabird viewing facilities in Africa - could potentially serve as a major drawcard (CapeNature has invested R5 million in ecotourism facilities over the past 10 years, and there are plans for additional investments with a strong focus on local community involvement[62]
- Community and hospitality events and activities: Hosting and expansion of the lobster festival, fish & chips festival, summer harbour market, film screenings, etc.
- Capturing greater value from small scale lobster and fish by retailing through local restaurant trade/ festivals. Lobster live holding/ "home industry"
- Possibility of shore based abalone culture if suitable land can be allocated
- Unlock unused land around the harbour
- Potential inclusion in West Coast Sailing Route

Requirements and constraints

- Higher tourism numbers: Lamberts Bay harbour is currently 254 km from Cape Town creating seasonal and small volume tourism
- Harbour rehabilitation is needed: the water is surging under the breakwater, causing harbour currents.
- The regional water shortage may constrain large-scale development
- Harbour management is not currently orientated to serving tourist industry and recreational boating sector
  - Local participation in harbour governance and management (possibly with community co-management) could assist to unlock these opportunities

6.3.2 Laaiplek

Laaiplek is a small fishing harbour with potential linkages to tourism. The harbour could be part of a network of industrial harbours but also has potential for a recreational and tourism focus.

Identification of priority of opportunity areas

- Maintain harbour as an industrial fishing harbour to preserve pelagic processing factory and jobs
- Fishing harbour with potential linkage to tourism:
  - Fishing harbour and estuary linked to integrated tourism route;

[62] www.capenature.org.za

  - Waterfront area at current fishing boat quay with tourist and community use potential for restaurants, shops etc. (fishing activities could continue at the private facilities). There already is a high volume of accommodation available around the harbour.
  - Inclusion of Bokkom Laan, Pelican Harbour and Laaiplek Harbour in tourism trips
  - Leverage fishery museum and arts & craft shops around the harbour
- Inclusion in West Coast Sailing Route
- Peak season craft retail

Requirements and constraints

- Evaluation of the long-term viability of Laaiplek as an industrial harbour
- To attract tourists into the harbour, the wooden main quay in the harbour needs maintenance and tourist facilities in harbour should be enhanced (e.g. picnic spots and beachfront accommodation)
- Tourists need access to the Berg River mouth which is currently cut off by DAFF fence.
- Community is not involved in the harbour
- High levels of sand in harbour: depth of harbour is very much dependent of tide. Berg River dam prevents the water flowing in the estuary
- Large St Helena Bay harbour less than 15km from Laaiplek raises question of possible consolidation of pelagic fishing harbour services
- Water pollution
- Making the same mistakes as Pelican Harbour community based development
- No launch facilities for bigger boats: consolidation of harbour services to St Helena?
- Private land ownership along wharf makes holistic planning difficult
- Fragmented tourism facilities (Pelican Harbour, Bokkom Laan and Laaiplek Harbour)
- Clear planning for crafts retail locations and linkages with tourism

6.3.3 St Helena Bay

St Helena Bay is a major pelagic industrial fishing harbour and has very little tourism facilities. The unoccupied harbour buildings could be used as community fish retail outlets, especially in summer when tourist numbers to the harbour increase.

Identification of priority of opportunity areas

- Maintenance of St Helena Bay as a major pelagic industrial fishing harbour with processing and services
- Aquaculture processing and services
- Small-scale fishing shore-based facilities to salt and dry Snoek, process and store lobster, distribute fish, and retail outlet
- Unoccupied or underutilised buildings in the harbour could be revitalized
- Forming of cluster of activities with other harbours to build smaller vessels
- Potential inclusion in West Coast Sailing Route
- Peak season craft retail

Requirements and constraints

- Current ski boat service facilities in the harbour are inadequate. A ski boat parking/logistics plan is required
- Current ineffective harbour management and cost recovery on services should be sorted out before revitalising the harbour
- A functional forum that addresses the needs of the fishers (such as slipway maintenance) is required
- Long term harbour leases

- Lack of crime and improved harbour security
- Clear planning for crafts retail locations and linkages with tourism

6.3.4 Saldanha Bay

Saldanha Bay and the area around the harbour has an industrial look and focus, mainly due to the Port with the only dedicated iron ore export facility in South Africa. The harbour is mainly visited by business tourists as general tourists tend to prefer to visit nearby Langebaan.

Identification of priority of opportunity areas

- Reinvestment into pelagic, fish processing, service facilities for aquaculture operations (salmon, oyster and mussel aquaculture)
- Installation of shore-based facilities for small scale fishers at DAFF slipway to promote enterprise development such as fish holding, processing and retail infrastructure whereby small scale fishing can be linked to tourism (sale of freshly caught fish)
- Improve management and operation of large vessel repair facilities. Align fees with Cape Town Port as it is cheaper to service trawlers in Cape Town.
- Linkage to tourism e.g. revival of the annual Seafood Oesfees
- Better management of the harbour will create service sector opportunity and employment
- Inclusion in West Coast Sailing Route

Requirements and constraints

- Although Langebaan is currently capturing main tourist stream, Saldanha Bay harbour requires and increased number of tourists into the harbour. Tourists however believe that Saldanha Bay is an industrial port, moreover since the iron ore jetty in the harbour has planned to double the capacity of its plant
- Include local tourism authority in harbour planning to integrate into tourism offerings
- Aquaculture is being threatened by the water pollution from the iron ore jetty and the measured pollution in, inter alia, Pepper Bay

6.3.5 Hout Bay

Hout Bay has mixed-use activity in its harbour: fishing (pelagic, lobster, tuna, and linefish), tourism and yachting & recreational tuna / line fishing boats. The harbour is close to Cape Town and attracts tourists and visitors arriving by buses.

Identification of priority of opportunity areas

- Upgrading of harbour infrastructure and services to promote fishing industry and other marine based sector development
- Yacht and boat building: indoor boat building/storage/repair facilities and/or light industry in empty harbour buildings
- Promotion of artisan skills from local community to work in the marine service
- High tourist volumes create the potential for wider variety of tourist offerings (currently, tourist buses stop very briefly on the Cape Peninsula tour)
- International sailing stopover: Royal Cape Yacht Club (Waterfront) is too expensive
- Local community selling arts & craft in the harbour
- Promotion of private boating culture and associated services
- Inclusion in South Coast Sailing route
- Craft retail through festivals, regular markets, informal traders or permanent formal retail
- Events

Requirements and constraints

- Organised criminal activity in the harbour resulting in pillage of vessels is a major constraint to all harbour activity. It is therefore vital that the security situation in the harbour needs to be sorted out via effective harbour management and harbour coordination
- To attract more tourists and international sailors, the harbour needs to be upgraded, slipways and repair quays need to be repaired and sunken ships need to be removed
- Appropriate and conducive harbour governance arrangements (see international harbour benchmarking above for examples)
- Professional harbour management required
- Equity, transparency and fair process in allocation of rights to premises
- Planning of space to match opportunities
- Inclusion of the local community in the harbour planning and management
- A business development and funding model
- Hout Bay is a politically influenced harbour with the tensions in Hangberg and Imizamo Yethu affecting all harbour activities. Processes to reconcile past grievances and accommodate local disadvantaged communities in harbour development opportunities will be essential
- Eastern wind creates an in-harbour wave, damaging moored boats
- Easy access to boat building skills, suppliers and clients, and ability to freely draw in skills and suppliers that are not readily available in the local area
- Cost-effective and competitive space
- Close to marine access for launching and commissioning
- Long term leases to enable return on investment in facilities
- Clear planning for crafts retail locations and linkages with tourism

6.3.6 Kalk Bay

Kalk Bay is not a primary fishing harbour anymore. There is limited fishing activity (linefish and lobster) in harbour due to lack of fish in False Bay and the on- and offloading possibility in Buffels Bay in Cape Point reserve.

Identification of priority of opportunity areas

- As Kalk Bay is a traditional harbour with original wooden fishing vessels and embedded in an important tourism centre, the harbour lends itself to establish a cultural focal point based in a retail outlet point for fresh fish by traditional fish sellers. Enhanced facilities and mentorship will improve enterprise development and small scale fish retail and value adding industries: e.g. smoking of Snoek, anchovies producing facility. A fisher community fish market with associated retail outlets for craft, takeaways and other stalls is a logical development
- As vessel activity in the harbour itself is declining (due to the decline in linefish resources and a shift away from traditional wooden vessels to more mobile skiboats), creative ways to keep the traditional character and tourist appeal are required through functional harbour activities e.g. marine based sport and community development opportunities e.g. youth development through sea based skills training, sports such as ski paddling, diving etc. The old “Sea Scouts” concept could be adapted to a modern context
- Harbour events
- Boat cleaning, storage and repair
- Potential inclusion in South Coast Sailing route
- Craft retail through festivals, regular markets, informal traders or permanent formal retail

Requirements and constraints

- A participative process to develop a vision and holistic development plan for the harbour with emphasis on its traditional character, role in traditional fisher community identity, and appeal of this to tourists/ Cape Town residents who will support linked SME opportunities
- Integrated spatial plan for the harbour precinct. A constraint is the multiple jurisdictions over surrounding land (DPW, Municipality, Transnet)
- Kalk Bay is not a primary fishing harbour anymore and creative economic activities are needed to find activities which preserve the harbour character with its traditional vessels
- Line fishing vessel utilisation of Kalk Bay has declined due to fast ski boats fishing from Millers Point who can get to the fish grounds quicker and cheaper and reach the markets earlier than the traditional chukkies in Kalk Bay. Due to the inconsistent load inspection at Miller Point, fishermen will avoid offloading their catch at Kalk Bay harbour
- Weather limits possibilities for tourism and recreational charter vessel activity
- Potential for visiting yachts but this will need to be negotiated with the community who see it as a threat by the rich
- Ineffective harbour users committee
- The current inappropriate harbour governance arrangements and management structures need replacement with arrangements conducive to the character and opportunities for the harbour. Devolvement of management based "good governance" principles involving community and municipality to drive implementation of a harbour development vision is required
- Cost-effective and competitive space
- Security and lack of crime
- Close to marine access for launching and commissioning
- Long term leases to enable return on investment in facilities
- Events

6.3.7 Gordon's Bay

Gordon's Bay harbour is a mixed use harbour (tourism, recreational and yachting) that is generally in good condition. The harbour is not a primary fishing harbour anymore and only a few lobster fishing boats use the harbour on an occasional basis.

Identification of priority of opportunity areas

- An opportunity would be to incorporate the harbour into the town of Gordon's Bay (fence has already been taken away) and change the harbour into a mini town centre that is included into the Hop-on Hop-off tourist bus coming from Cape Town. A further opportunity would be to start a sailing school next to the Yacht Club
- The harbour is well suited to the promotion of community youth/ sports development activities. The yacht club provides a strong institution for basing these at
- Boat cleaning, storage and repair
- Inclusion in South Coast Sailing route
- Peak season craft retail
- Events

Requirements and constraints

- A participative process to develop an integrated vision and spatial plan is required.
- Space is a limiting factor and issues such as parking will require careful planning.
- Devolution of governance and management to local level will probably be effective as the harbour already has a very active local management committee.
- Deproclamation from "fishing harbour" status could be considered due to the low fishing vessel activity.

- Cost-effective and competitive space
- Security and lack of crime
- Long term leases to enable return on investment in facilities
- Clear planning for crafts retail locations and linkages with tourism

6.3.8 Hermanus

Hermanus is a mixed use harbour with recreational ski-boat fishing and tourism, but commercial fishing activity has all but ceased. The harbour, known as the whale watching capital of the world, attracts international tourists in summer and winter. The industrial land surrounding the harbour is an aquaculture development zone which is the main locality for abalone culture and services.

Identification of priority of opportunity areas

- Enhancement of tourist opportunities linked to the harbour
- Opportunity exists for local/traditional fishermen to sell products to tourists
- Arts & Craft in harbour
- Aquaculture service industry development on surrounding industrial land
- Events linked to tourism, recreation, community, yachting etc.
- Boat cleaning, storage and repair
- Inclusion in South Coast Sailing route
- Craft retail through festivals, regular markets, informal traders or permanent formal retail

Requirements and constraints

- A participative process to develop a holistic vision and integrated spatial development plan is required for the harbour
- Although the Hermanus attracts a lot of tourists, the shore based facilities in the harbour are not suitable for tourist waiting for whale charter vessels
- Tourists are currently discouraged by the lack of tourism facilities, the R5 harbour entrance fee, neglected maintenance of harbour facilities (toilets, no visitor centre) and limited available parking in peak season
- Need for governance and management structures which accommodate local needs. Suitable harbour for locally devolved management with Municipality and community stakeholders playing a lead role
- Cost-effective and competitive space
- Security and lack of crime
- Close to marine access for launching and commissioning
- Long term leases to enable return on investment in facilities
- Clear planning for crafts retail locations and linkages with tourism

6.3.9 Gansbaai

Gansbaai is predominantly an industrial fishing harbour with small pelagic, lobster, abalone vessel and processing facilities. Due to its industrial feeling, the harbour is not often visited by tourists. However, potential linkages exist between Kleinbaai (shark cage diving), the centre of Gansbaai (arts & crafts) and the Old and New harbours (fishing restaurants).

Identification of priority of opportunity areas

- Enhancement of current management and services to existing commercial fishing activities to secure this sector
- Small scale fisher facility for value adding traditional seafood products, craft, retail, linkage to tourist route.

- Possible development of New Harbour as a recreational craft harbour if additional moorings and jetties are installed
- Tourism facilities linked to recreational harbour.
- Examples of events in the harbour and vicinity if recreational boating and tourism facilities installed
- Linkage into regional tourist routes
- Portions of the New Harbour land and water are underutilized and could be used for aquaculture services expansion
- As the harbour is still a genuine fishing harbour with an active fishing fleet, boat building and repair facilities could be viable
- Forming of cluster of activities with other harbours to build smaller vessels

Requirements and constraints

- A process to develop a vision and integrated spatial development plan for the harbour
- Partially devolved harbour management. Industrial component could perhaps be centrally managed, which tourism/ recreational aspects local
- Tourists are currently not attracted to visit the harbour and don't see the harbours as a tourist destination, only come for whale watching from harbour or shark cage diving from Kleinbaai
- Tourist have the perception of nothing to do in Gansbaai besides shark cage diving and are more attracted by Hermanus with its all-year tourism facilities. Furthermore, harbour parking is limited in peak season
- Pelagic fish factory under pressure from property development interests due to the fish smell, and clarity is needed on its future
- Viability of maintaining pelagic fish processing –Gansbaai Marine factory operates below capacity due to restricted access to fish quota and higher prices paid for quota by bigger companies on the West coast
- Wind direction: wind creates in-harbour wave in old harbour
- Long term harbour leases
- Improved harbour security

6.3.10 Arniston

Arniston is known for its traditional 200-year-old fishing village Kassiesbaai: a national heritage site and a major international tourist attraction. While the fishing community, traditional wooden vessels and harbour still function, the economic viability is marginal and poverty and lack of economic opportunity are pervasive.

Identification of priority of opportunity areas

- As many tourists visit the small fishing village (including a high percentage of international tourists), the traditional community could be more incorporated more in the tourism value chain
- Increase in fine food, visibly seafood, traditional fishes and other
- Local event(s) linked to the fishing community
- Accommodation in Kassies Baai
- Linkage to regional tourism routes, particularly from Walker Bay

Requirements and constraints

- To incorporate the traditional community into the tourism value chain, the local heritage and local community management institution should be actively involved
- Struisbaai generally more attractive for local tourists and house owners
- There is some potential for the sale of fresh fish in the harbour (existing fish cleaning facilities in the harbour), however further market research on tourist volumes, seasonality and

requirements would be needed to assess if this is/ at what point it could become a sustainable option
- As the Kassiesbaai community has a high poverty level and limited capacity, any harbour linked development activities will require public sector funding and institutional support
- Indications are also that any developments would need to be carefully managed to avoid contributing to in-fighting or tensions in the community e.g. it may be more appropriate to support a single service provider that shares profits with all registered community members, rather than one community benefiting from an enterprise opportunity
- Public – private partnerships would be a good vehicle to link the local community more into the tourism value chain and build their capacity for participation

6.3.11 Struisbaai

Struisbaai is predominantly a line fish harbour, with fish cleaning facilities, several facilities (coffee shop, small food, fish outlets) having access to daily fresh fish and an adjacent beach. The harbour is integrated in the surrounding area and is a recreational focal point for the community.

Identification of priority of opportunity areas

- The harbour could be enhanced as a traditional fishing and cultural recreational hub, attracting high end tourism and adventure tourism to the nearby area (e.g. kite surfing, whale watching charters)
- A high-end hotel property development has been identified for the area – whilst such a development could increase economic activity in the area if it successfully attracts additional tourists, care would need to be taken that the development did not negatively impact on the character and community sense of ownership of the harbour
- Due to the continued fishing activity, small scale fishers could be supported with premises to add value by participating in processing and retail
- Boat cleaning, storage and repair
- Peak season craft retail

Requirements and constraints

- Require the development of a vision and plan for the harbour as multi-use fishing/recreational facility
- Devolvement of management to local level appropriate
- Struisbaai is difficult to reach for tourists as it is a fairly isolated harbour with poor public transport possibilities. Upgrading of the access road from Walker Bay will open up greater opportunity from coastal tourists
- An intervention to link fishers into the distribution and retail sector is required. For example, the proposed WWF small scale fishery support programme to label fish from traditional communities as sustainable/ “Fair-trade” and obtain access to high end retail and restaurant outlets
- Easy access to boat building skills, suppliers and clients, and ability to freely draw in skills and suppliers that are not readily available in the local area
- Cost-effective and competitive space
- Security and lack of crime
- Long term leases to enable return on investment in facilities
- Clear planning for crafts retail locations and linkages with tourism

6.3.12 Stilbaai

Stilbaai is predominantly a line fish harbour, but linkage to sea/nature based recreational activity in the area is high and the coloured community retains a strong cultural identity to fishing. The traditional fisher community and local property owners feel excluded from the governance of the harbour.

Identification of priority of opportunity areas

- Harbour as a community focal point for sea based recreation and tourism activities
- Facilities and services for eco-tourism and nature based recreational activities
- Fishing community participation in these activities and services. E.g. fish processing closer to fishing community in the case of producing products such as shark biltong, pickled food, etc.
- Events venue e.g. Agulhas Rubber Duck Race, triathlons, hosting events during the holiday season

Requirements and constraints

Conducive locally based harbour management is required. Current DAFF harbour management only recognizes fishing and should open up for opportunities in sports, community users and tourism (the traditional servitude/pedestrian through harbour has been closed).

- There is a high level of red tape within the DAFF management in respect of the harbour and government's arrangements have not been conducive to economic harbour development.
- A vision and plan for a multiuse harbour integrated into the local LED framework
- Devolution of management to municipal level could be workable in this case given the close involvement and interest of the municipality
- Sustainability issues with the line fish resource mean that fishing will decrease still further.

7 Recommended principles of approach and implementation

Processes are underway at a national level to review the institutional arrangements for governing harbours, in particular the development of a dedicated harbour management entity by National Treasury. This project will therefore focus its recommendations on the implications of the economic analysis on harbour planning, strategy and governance.

Principles that emerge to guide fishing harbour development **to achieve the optimal socio-economic impact for regions** include the following:

a. Harbours should be seen as a public asset serving local communities and local, provincial and national economies

Direct economic activity by tenants is unlikely to be able to cover the cost of major marine infrastructure development or maintenance, but could in some cases cover the operations and maintenance of land-side infrastructure

Funding and planning arrangements should therefore ideally take into account the economic impact and public good benefits of harbours, rather than just the direct financial costs and benefits associated with harbour users. Public funds may thus justifiably be used for subsidising harbour development and operational costs where 1) a public good is generated beyond the private benefit of harbour users and 2) there is market failure.

An example of a public good benefit is provided by Hermanus harbour is critical infrastructure supporting whale watching, which is the town's major international tourism drawcard. In view of this wider public good benefit, it would be unfair to burden harbour users with the full cost of harbour maintenance.

An example of market failure is the low rate of traditional fisher community participation in opportunities in the seafood value chain. As the market fails to address this problem, public funds should be used to overcome constraints to participation through various intervention strategies such as local community SME promotion, capacity building, access to harbour infrastructure, fishing rights and so on.

b. **Planning and strategy for harbours should be integrated into economic planning processes**

Relevant economic planning and strategy processes include Local Economic Development Plans, provincial micro-economic development and sectoral planning and strategy, as well as national economic sectoral planning and strategy in relevant sectors (fishing, aquaculture, boatbuilding, agro-processing, food, tourism). Consideration should also be given to how harbours might link to planning and strategy around Special Economic Zones.

Provincial (and in some cases national) sector development bodies, DEDAT and DAFF can play an important role in integrating harbour opportunities into sectoral strategies and LED planning. For example:

- The W. Cape Aquaculture Development Initiative (WCADI), guided by the National Aquaculture Strategic Framework (led by DAFF) is already involved in planning around aquaculture development nodes, and could incorporate planning around the role of harbours.
- The Small Scale Fishing Policy gazetted under the Marine Living Resources Act which seeks to promote greater fisher participation in the seafood and tourism value chains. Implantation will require intergovernmental cooperation including municipal LED integration, provincial sector development support, and national department input including DAFF, DTI, Department of Tourism, and Department of Environment Affairs. NGO partners such as WWF have a key

role to play in supporting small scale fisher sustainability, product certification and access to markets.
- The Marine Industries Association of South Africa (MIASA) could help to coordinate efforts around boatbuilding, repair and storage, as well as identify appropriate mechanisms to include harbours within the "Grow Boating" campaign
- Other sectoral opportunities and initiative may emerge over time and involve other sector initiatives e.g. harbours as performing and visual arts venues, harbours as filming locations and unusual film viewing sites

As the resources and capacity of these institutions are quite limited in most cases, it is likely that their role would need to be focused around higher impact initiatives, and potentially be supported with additional funding, as well as being effectively coordinated e.g. through the Cape Catalyst office).

c. **Strong local involvement in harbour governance and management**

Both the benchmarking findings and the input from stakeholders during this project point to the need for strong local involvement in governance and management of harbours to ensure they meet the socio-economic needs of their surrounding areas.

The **appetite and capacity for co-management or community management or operation is different in each harbour**, with different levels of community cohesiveness. Potential revenue from harbour activity and operations will also vary per harbour, which will impact upon the extent to which the harbour can be self-sufficient or attract interest from the private sector to participate in operations. A **one-size-fits-all approach is therefore unlikely to be appropriate**. It could be preferable to have a mechanism to evaluate the most appropriate governance and operation approach for each harbour in consultation with local communities, harbour users, local government and business associations, potentially defined into categories such as:
- Nationally operated harbour
- Co-managed harbour with users
- Community operated harbour
- Municipally operated harbour
- Public-private partnership operated harbour

As indicated from the benchmarking, it **may also be appropriate to create harbour management structures that support more than one harbour**, whether because of their low levels of activity, because they fall within one municipal jurisdiction or because of strong links between them. There may also need to be **provisions for decommissioning** of harbours if activity levels are low, socio-economic impact is low, costs of infrastructure upgrade or maintenance are not affordable, and other harbours in the vicinity could serve as an alternative point of marine access and service.

Benchmarking also provides an example of harbour boards without harbour user forums through which independence can be maintained and high quality board members can be ensured. However, organisational support might be necessary to ensure that **all stakeholders can articulate their needs and issues** in the user forums.

d. **Multi-stakeholder partnership for implementation**

Relevant sector development agencies could be involved in providing "soft infrastructure" and support services in the harbours, or supporting sectoral initiatives to unlock economic opportunities. For example:

- DEDAT and tourism promotion agencies should consider developing a "fishing harbour route" with traditional seafood, traditional fishing culture and sea based eco-tourism as the main themes.
- W. Cape Fine Foods could seek to grow its membership in harbour hinterlands, and begin to support supply chain linkages and promotion of "home-style" fine food from surrounding areas in partnership with local communities and entrepreneurs
- DEDAT and the Cape Craft and Design Institute could expand the current initiative into Hout Bay harbour with Hangberg community residents into other harbours
- The WWF is initiating a project to support building a brand traditional line fishers products origin and sustainability to enable more value to be captured in the retail and restaurant sector. Promoting greater fisher participation in marketing and distribution is proposed, and harbour can provide essential infrastructure and premises for fishers to process, distribute, market and retail products.
- WCADI is a stakeholder driven institution through which the capacities of the commercial aquaculture sector, service sector, and research institutions can work in concert with Western Cape provincial government to promote aquaculture sector development initiatives.

LED departments and Local Tourism Offices (LTO) could help build linkages across sectors and by ensuring communities are involved in a sustainable way. Additional enterprise development support could potentially be provided through DEDAT programmes and **the dti**'s cooperative programme.

Wesgro can also play a role in attracting investment into the harbours once conditions have been made more aligned with investor requirements.

Potentially implementation could be coordinated through representation of LED and LTO representatives on Harbour Users Committees or their replacement structure, as well as representation of harbour users on LED and tourism forums.

e. Unlock creativity of community and entrepreneurs

Government should facilitate fishing harbour re-development primarily by institutional and regulatory means through the provision and maintenance of public infrastructure and focused public programmes which encouragement of self-reliance and individual enterprise, and on the unlocking of innovative capacity of the community.

- Stakeholders innovative capacity is key to optimising the socio-economic development of the fishing harbours.
- Government should facilitate partnership with local communities, users and private sector (including local entrepreneurs) with strong guidance on prioritization and permissible uses to ensure optimal economic benefits for the region rather than just profit-taking by developers, but also noting the need to avoid onerous procedures and bureaucracy that will put off potential partners or hamper involvement of genuinely interested/committed investors and local communities.
- Promote preferential access and provide SME development support for previously disadvantaged persons, particularly in respect of fishing value chain entrepreneurial opportunities.

f. **Minimise red tape and bureaucracy, devolve day-to-day management from central government**

If a service or function can be performed by non-government agencies within a good governance framework which achieves the public good goals of fishing harbours, it should ideally be devolved from government administration, including:

- Separating out fishing regulation and inspection services from overall harbour management as a discreet function within fishing harbours.
- Contracted out property management, security, and day-to-day maintenance etc.
- Infrastructure development and maintenance by the proposed harbour management entity – on behalf of DPW through provision of treasury grants e.g. through critical infrastructure /MIG.
- On-site harbour managers, part-time for smaller, full-time for larger harbours under authority of the harbour management entity.
- Provide some flexibility for different levels of local devolution in each case e.g. where strong interest and ability for community or user co-management.
- Enabling legislation to provide clarity and transparency on issues such as multi-sector purpose, jurisdictional issues, approach to user charges, etc. The current review of the MLRA provides an opportunity for revision of the current provisions on fishing harbours.

8 Next steps and further research required

Areas **that are beyond the scope of this project**, but that should ideally be taken up, either by the DPW spatial and economic planning project or other research and consultation processes include the following:

- Information gathering on the historical and cultural significance of the harbours, in preparation for incorporating the unique heritage and traditions into the fabric of future developments in the harbour, including through visual arts and photography
- Investigation of the role of non-designated slipways and ramps and how they could be better regulated and managed in future, in particular during peak fish runs
- Participatory decision-making on prioritisation of the socio-economic role of each harbour within its local and regional context
- Further investigation of the most appropriate governance solution for each harbour, taking into account local governance capacity and willingness, as well as local, provincial and national economic planning and strategy
- Supporting infrastructure and service requirements in the vicinity of the harbours, including transport and utilities
- More detailed forecasting of potential scale of future growth in prioritised sectors relating to each harbour.
- Study on linking of harbours by means of a “Fishing Harbour Route” to promote value chains development for outlying harbours e.g. a fishing harbour with attractions such as fine food, traditional fishing culture, birding, whales, sharks, regional wines, etc.
- Study to conceptualise a “Seafood Western Cape” initiative to diversify seafood products, promote traditional seafoods, value add seafood, support small scale fisher enterprise development, attract tourists to harbours and promote authentic and characteristically Western Cape seafood.
- Spatial planning of harbours as venues for events such as festivals, sporting events, filming, craft fairs, community activities etc.

Possible examples of “quick wins” include the following:

- “Save our Seabirds” festival collaboration in 2013
- Cooperation with WWF around community sustainably caught fish promotion and marketing
- Mobile / pop-up food venues during peak seasons and festivals/events
- Collaboration with MIASA and SAMSA around “Grow Boating” campaign and marine tourism e.g. sailing route, training, easy SAMSA certification
- Portable floating performance venue shared between harbours e.g. barge and grandstand

Appendix A: Reports consulted

Reports reviewed included the following:

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FAO, 2010. National Fishery Sector Overview: South Africa. Food and Agriculture Organisation of the United Nations, Fishery and Aquaculture Department. http://www.fao.org/fishery/countryprofiles/search/en

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Kumba Logistics, http://www.kumba.co.za/ob_logistics.php

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Appendix B: Role player/stakeholder consultations

The following institutions/stakeholders were consulted during the preparation of this report, over and above consultations through Reference Group meetings:

Overall

1. Andrew Cockcroft, Department of Agriculture, Forestry and Fisheries
2. Anne Gray (Anne Albatross Cape Pelagics)
3. Coastal Links/ Masifundise
4. Craig Carbutt, Cape Craft and Design Institute
5. Edward Shalala, Western Cape Aquaculture Development Initiative
6. Lucas Williams, National Department of Agriculture, Forestry and Fisheries
7. Film industry via Cape Film Commission and Cape Town Film & Events Office
    a. Marine Scene Film and Tourism
    b. Rudi Riek: Independent Consultant, Commercial Producers Association (CPA) and SA Association of Stills Producers (SAASP)
    c. Vlokkie Gordon: Film Afrika
    d. Jason Martin: Frog Squad
    e. Juli Lotter: Lobster Tree
    f. Valda Dicks: Do Productions
    g. Jardin Roestorff: Location Scout
8. Francois te Water Naude, Western Cape Fine Food Initiatives
9. John Duncan, WWF South African Sustainable Seafood Initiative
10. Lucas Williams, Department of Agriculture, Forestry and Fisheries
11. Melanie Mahona, Western Cape Department of Economic Development and Tourism
12. Mr Roger Krohn, Aquaculture Association of Southern Africa
13. Roy Bross, South African Deep Sea Trawling Industry Association
14. Terence Isaacs (City of Cape Town, Film and Events Office)
15. Vanessa Davidson, Marine Industries Association of South Africa
16. Vernon Head (Birdlife South Africa)
17. Werner Harms, Western Cape Department of Economic Development and Tourism

Local, district and individual harbours

West Coast overall

18. Mr Dave Osborne, Tourism Officer St Helena Bay & Saldanha Bay
19. Mr Charles Barends, Saldanha Bay Municipality - representative
20. Mr Theo Rebel, Saldanha Bay Municipality - Manager Forward Planning, Environment & Heritage
21. Mr Gary Tomlinson, Saldanha Bay Municipality - Head Town Planning
22. Councillor Mr Frank Pronk, Saldanha Bay Municipality - Portfolio Head Planning and Strategic Services
23. Mr Dave Osborn, Saldanha Bay Municipality - Tourism Manager

Lamberts Bay

24. Mr Gerhart Burger, Co-Owner Isabella's Restaurant & Member of Lamberts Bay Harbour Committee
25. Mrs Anel van Zyl, Lamberts Bay Tourism Association
26. Mrs Margaret Van Zyl, Lamberts Bay Tourism Association
27. Mrs Anna Saal, Lamberts Bay Tourism Committee (Development & Housing)
28. Mr Joos Engelbrecht, Lamberts Bay Crayfish and Cultural Festival Chairman
29. Mrs Salome Horn, Vukani Mkhosi Kasi (Organic Vegetable Garden)
30. Mrs Natasha Visagie, Bird Island Guide

Laaiplek
31. Mr Marius Meier, Café Opie Hawe
32. Mr Andre Eigelaar, Eigelaars
33. Mrs Bea Struwig, Tourism Manager
34. Mr Dan Ahlers & Mr Malan, Local Boat Trips organisers (>20yrs of knowledge)
35. Mr Monti van der Westhuizen, Chairman of the Velddrif Chamber of Commerce
36. Mrs Marion Cole, Sailor, nomadic tent manufacturer, ex sail maker
37. Mr Chris Geldenhuys, Foodcorp. General manager of fish processing plant

St Helena Bay
38. Mrs Cathy Thomas, Fishing industry
39. Mr Neville Luyt, Fishing industry
40. Mr Bernie Pols, Benguela Holdings (Pty.) Ltd.

Saldanha Bay
41. Mrs Carmilita Mostert, Fishing Industry
42. Mr Christo Van Wyk , Chair of the Saldanha Bay Forum
43. Mr Antonio Tonin, Saldanha Bay Oyster Company
44. Mr Andrew McLachlan, fishing and aquaculture entrepreneur

Hout Bay
45. Mr Warren Evans, Owner of Circe Launches
46. Mrs Jenny Nelson, Tourism officer
47. Mr Paul, Hout Bay Market
48. Mr Don Van der Heyden, Local traditional fisher rights
49. Mr Andrew Johnston, Artisanal Fishers Association
50. Mr Lionel Human, Hout Bay Festival
51. Mr Isaac Crowster, Tour Guide - Heritage Trust
52. Mr Simphiwe Cele, local fisherman
53. Mr Goodman Ngwangwa, local fisherman

Kalk Bay
54. Mrs Mymoena Pogenpoel, Boat Owner & Member HUC
55. Mr Tony Trimmel, Kalk Bay Boat Owners Association & Chairman HUC
56. Mr Daniel , Kalk Bay Harbour House
57. Mr Michael Townsend, Owner Harbour House &Waterfront Development Co.
58. Mr Rafiq Isaacs, Fish Traders Community
59. Mr Horst Kleinschmidt, Ex-DAFF Deputy Director General & Local Resident

Gordon's Bay
60. Mrs Di Nosworthy, Tourism Office
61. Mr Danie Miller, Chairman Gordon's Bay Business Forum
62. Mr Kelvin Leibrandt, Local Lobster Fisherman
63. Mr Andre Paulsen, B.P. Gordon's Bay
64. Mrs Annie van Wijk, The Tavern Restaurant
65. Mr Mark Engelke, The Tavern Restaurant
66. Mr Ralph Panebianco, Harbour Lights Restaurant
67. Mr Antonio Panebianco, Harbour Lights Restaurant
68. Mr Paul Tanner, Commodore - Gordon's Bay Yacht Club
69. Mrs Lana Verran, Manager - Gordon's Bay Yacht Club
70. Mr Cyril Brown, Gordon's Bay Reviews
71. Mr Clive Herman, Gordon's Bay Sea Services
72. Mr Kevin Weaing, LeapFrog Properties & Vice Chair Gordon's Bay Business Forum
73. Mr Rowan Deur, private
74. Mr Brian Townsend, Gordon's Bay Residents Association
75. Mr Gys Rossouw, Gordon's Bay Residents Association

76. Mr Philip Hechter, Gordon's Bay Residents Association
77. Mr Jacqui Logan, Gordon's Bay Residents Association
78. Mrs Monica Miles, Gordon's Bay Residents Association - Firewise
79. Mr Kobus Louw, GB CPF
80. Mr Calain Moshi, Gordon's Bay SARS
81. Mr Gari Misrolf, T.T.C.A.

South Coast overall

82. Mr Shaun Moses, Overstrand Municipality - LED Manager
83. Mr Solomzi Madikane, Overstrand Municipality - LED Director
84. Mr Ben Solomon, Overstrand Municipality - Portfolio for Finance and Economic Development
85. Mrs Nicolette Botha-Guthrie (DA), Overstrand Municipality - Mayor
86. Mr Pieter Scholtz (DA), Overstrand Municipality - Deputy Mayor
87. Mr Scot van der Merwe, Overstrand Municipality
88. Mr Riaan Kuchar, Overstrand Municipality
89. Mr A. Jantjies, Overstrand Municipality
90. Mrs Alison Coughlan, Chief Executive Officer Cape Agulhas Tourism
91. Mrs Almare Scholtz, Cape Agulhas Municipality - LED Manager
92. Mr Heinrich Spandiel, Cape Agulhas Municipality

Hermanus

93. Hermanus Muncipality
94. Mrs Delia Loubser, CEO Hermanus Business Chamber
95. Mrs Kim Maclean, The Sharklady
96. Mrs Alta Pretorius, former CEO Hermanus Business Chamber
97. Mrs Jeanette Du Toit, private

Gansbaai

98. Fanie Bothma (Chairperson) and Gansbaai Business Forum
99. Mrs Glenda Kitley, Tourism Office
100. Mr Jason Stafford, Ivanhoe Sea Safaris
101. Mr Liam, Municipal Conservation
102. Mr Wilfred Chivell, Marine Dynamics and Dyer Island Cruises
103. Mr Andre Coetzee, Gansbaai Marine and chairperson of the Harbour Users Committee

Struisbaai

104. Mr Stuart du Plessis, Fishing community rep
105. Mr Joey Roodt, Langezandt Fishermens Village
106. Mrs Lizbe Vorster, Marketing Langezandt Fishermens Village
107. Mr Malan Conradi, Cape Agulhas B&B and Adventure Tourism

Arniston

108. Mrs Rowina Europa, Coastal Links
109. Mr Danny Europa, Arniston fishing community

Stilbaai

110. Mr Chris Onrust, Hessequa Municipality - Socio-Economic Manager
111. Mr Johan Jacobs, Hessequa Municipality - Municipal Manager
112. Mrs Emor Nel (DA), Hessequa Municipality – Mayor
113. Mr Charles Prins, Hessequa Municipality - Councillor
114. Mr Leon Fourie, Hessequa Municipality - Speaker
115. Mr Wium Kitshoff, Chairman Tourism
116. Mr Dries de Beer, Stilbaai Sakekamer
117. Mr Martin Lowis , Stilbaai Sakekamer

118. Mr Philip Claassens, Ward Counsellor Ward 1
119. Mr Dr. Prins, Ward Counsellor Ward 3
120. Mr Corne Meiring, Fish buyer
121. Mrs Hennie Brand, Fish buyer
122. Mr Patrick Duddy, Tourism
123. Mr Sidney Lendor, commercial fisherman
124. Mr Tom Michaels, commercial fisherman
125. Mrs Katrina Solomon, Dream Catcher and Tourism
126. Mr Frank Molowitz, commercial fisherman
127. Mr E. Heynse, commercial fisherman
128. Mr J.J. Riddles, commercial fisherman
129. Mr C. Conradie, commercial fisherman
130. Mr W. Manha, commercial fisherman
131. Mr G.J. Marais, commercial fisherman
132. Mr H.P. Michaels, Harbour Users Committee