

*AFTER....., WHAT IS LEFT?*



*INVEST*  
**DURBAN**

**CITY THAT'S  
GEARED  
FOR GROWTH**

website: [invest.durban](http://invest.durban)



**KEY TAKE-AWAYS  
COVID19 AND UNREST  
HAVE BEEN  
DEVASTATING,  
BUT ECONOMY  
REMAINS  
RESILIENT AND  
OPPORTUNITIES  
ABOUND**

- Global FDI performance still declining in 2021, but significantly improved compared to 2020. Declining FDI Investment replicated nationally, however annually this is a small component of total investment nationally.
- Investors have continued to make major commitments. **R110 billion in new commitments have been secured**, just in November 2020; and more are due within 2021. This is **over R770 billion in investment commitments in the last 3 years**.
- **Public expenditure on infrastructure has increased by 29%** in real terms in the past 3 years, and is projected to increase further over the medium term. This injection into the economy will surpass temporary Covid19 losses in private investment.
- **Significant plans exist to turn around investment enabling infrastructure in the next three years** (Restructuring of Eskom, enabling self generation, mass procurement of renewable energy, the turnaround of the Durban Port, the development of dry ports, national prioritisation of climate change, addressing water licensing backlogs, an Agency to manage water resources, internet connection in 80% public sector and the digitisation of service delivery.)
- South Africa's **metros continue to be continental centres of excellence** in selected aspects of investment, tourism and climate change.
- **PPP's & many other forms of much closer collaboration**



## OVERVIEW: DURBAN

### Fast Facts:

- 100kms coast
- 2300 sq kms
- 4m people in 2020  
(incr. by 1.9%)
- 61% KZN GVA
- Muni: R52Bn p.a.
- 1 of SA's top 3 Metros,  
plus best in Africa (\*)



# GAUTENG CITIES



- **Richest City in Africa**  
Africa Wealth Report, 2021
- **Best City for Climate Change Finance & Economic Development**  
C40 Cities Awards, 2021
- **Hosts Best International Mixed-use Developments**  
International Property Awards, 2020, 2019, 2018, 2017
- **Sustainable Cities and Human Settlements Award**  
UN Global Forum on Human Settlements, 2019



# CAPE TOWN



- **One of Global Top 10 Sustainable Cities**  
Global Best City Awards (American Urban Institute), 2021
- **Most Sustainable City in Africa**  
Global Best City Awards (American Urban Institute), 2021
- **Smartest City in Africa**  
SCO Smart City Observatory, 2020
- **Best City for Climate Change Adaptation and Implementation**  
C40 Cities Awards, 2021

# INVESTMENT AND ECONOMIC ACCOLADES AT THE CITY LEVEL

## DURBAN



- **Durban #1 in SA, & Africa for ROI on residential prop., plus in Top 50 Worldwide**  
Knight Frank Global Residential Cities Index, 2016
- **Least congested Metro City in South Africa**  
Tom Traffic Index (TTTI), 2017
- **South Africa awarded best “Global (BPS) destination” for 5 last years (with Durban Best in many categories)**  
Global Sourcing Association, 2018
- **British Airways lists Durban as #1 globally on their “Must-See Destinations for 2019”**  
British Airways Group Marketing, 2018
- **Best FDI City in Africa**  
CNN Money / International Investor, 2020
- **3 x Diamond Arrow Awards : Doing Most for Sustainable Development; Doing Most to Attract Foreign Investment; Doing Most to Attract Local Investment in Kwazulu-Natal**  
Professional Management Review Excellence Awards 2021
- **Durban was a Nominee for Best FDI Destination: South Africa 2021**  
The Bloomberg Decision Maker Business Awards 2021



# OVERVIEW: FLAGSHIP PROJECTS

## Fast Facts:

- Investment R217 Billion
- Estimated Job creation:  
Over 300 000 construction jobs  
& 120 000 permanent jobs



# SOUTH AFRICA GROWTH PROSPECTS GOOD NEWS!

- **Commodity boom** which is lifting national growth – good agricultural output and growth in minerals/metals.
- **Tax revenue increase:** Tax revenue amounted to R377-billion for the period from April to June 2021, an increase of 56.2% on the previous year. *This will increase government's spending power.*
- **RCL has reported a return to profit** and even though the chicken side is still struggling, the business is doing well.
- **Checkers has recorded a profit** and created 4000 new jobs.
- **Renewable energy** is another area of growth and nationally, cities have put out a requests for quotations by independent power producers. This is attracting significant interest and will create growth.
- **Tech and innovation** present inherent opportunities for economic growth which is essential for the country's future
- **SA has recorded primary budget surplus** for the first time in 3 years – *recording more revenue than expenditure*
- **The rand is the best performing emerging market currency**, assisted by current account surpluses and the commodity boom



Year	2019	2020	2021
Revenue	1000	1000	1000
Expenditure	1000	1000	1000
Surplus	0	0	0
Profit	0	0	0
Loss	0	0	0
Net Income	0	0	0
Operating Income	0	0	0
EBITDA	0	0	0
EBIT	0	0	0
EBE	0	0	0
Net Income	0	0	0
Operating Income	0	0	0
EBITDA	0	0	0
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EBE	0	0	0
Net Income	0	0	0
Operating Income	0	0	0
EBITDA	0	0	0
EBIT	0	0	0
EBE	0	0	0
Net Income	0		



# BRAND SOUTH AFRICA

## 2020 Rule of Law Index



- South Africa ranks 45/128 countries in the 2020 Rule of Law Index.
- According to the report, South Africa is in the “upper middle income” category positioned at 10/42.

2020 Rule of Law Index	
Overall Ranking	48/128
Sub-Saharan Regional Ranking	5/31
Constraints on Government Powers	33/128
Absence of Corruption	58/128
Open Government	30/128
Fundamental Rights	41/128
Order and Security	110/128
Regulatory Enforcement	45/128
Civil Justice	41/128
Criminal Justice	44/128

# BRAND SOUTH AFRICA

## INDICIES ON BRAND SA'S ANNUAL PERFORMANCE



### Climatescope Outlook

**Investment in renewables** is growing at a rapid pace in Sub-Saharan Africa. The report outlines that eighteen (18) countries received more than \$10 million in clean energy funding in 2018, after 23 countries that initially received investments in 2017.

In 2018, **across 101 developing countries – excluding Brazil, China and India, South Africa had the third-highest level of finance for new clean energy plants.**

Nation Brand Indicators	Rankings
2020 Open Budget Index	1/115
WEF Global Competitiveness Index	N/A
Press Freedom Index	32/180
2020 Ibrahim Index of African Governance	6/54
2020 UNDP - Human Development Index	114/189
World Bank - Ease of Doing Business Index	N/A
2020 Corruption Perceptions Index	69/180
2020 Brand Finance - Nation Brands Index	47/100
2020 Soft Power Index	37/60
2020 Bloom Consulting Country Brands	36/194
The Good Country Index v 1.4. (2020)	35/153
Ease of Doing Business	84/190

# BRAND SOUTH AFRICA

## *Ibrahim Index of African Governance 2020*



- An annual assessment of quality of governance in every African country
- South Africa ranks **6th out of 54 countries** overall Governance
- Scores in the Top 10 in all four categories



Sustainable  
Economic  
Opportunity

**8th**



Safety &  
Rule of Law

**8th**



Participation  
& Human  
Rights

**7th**



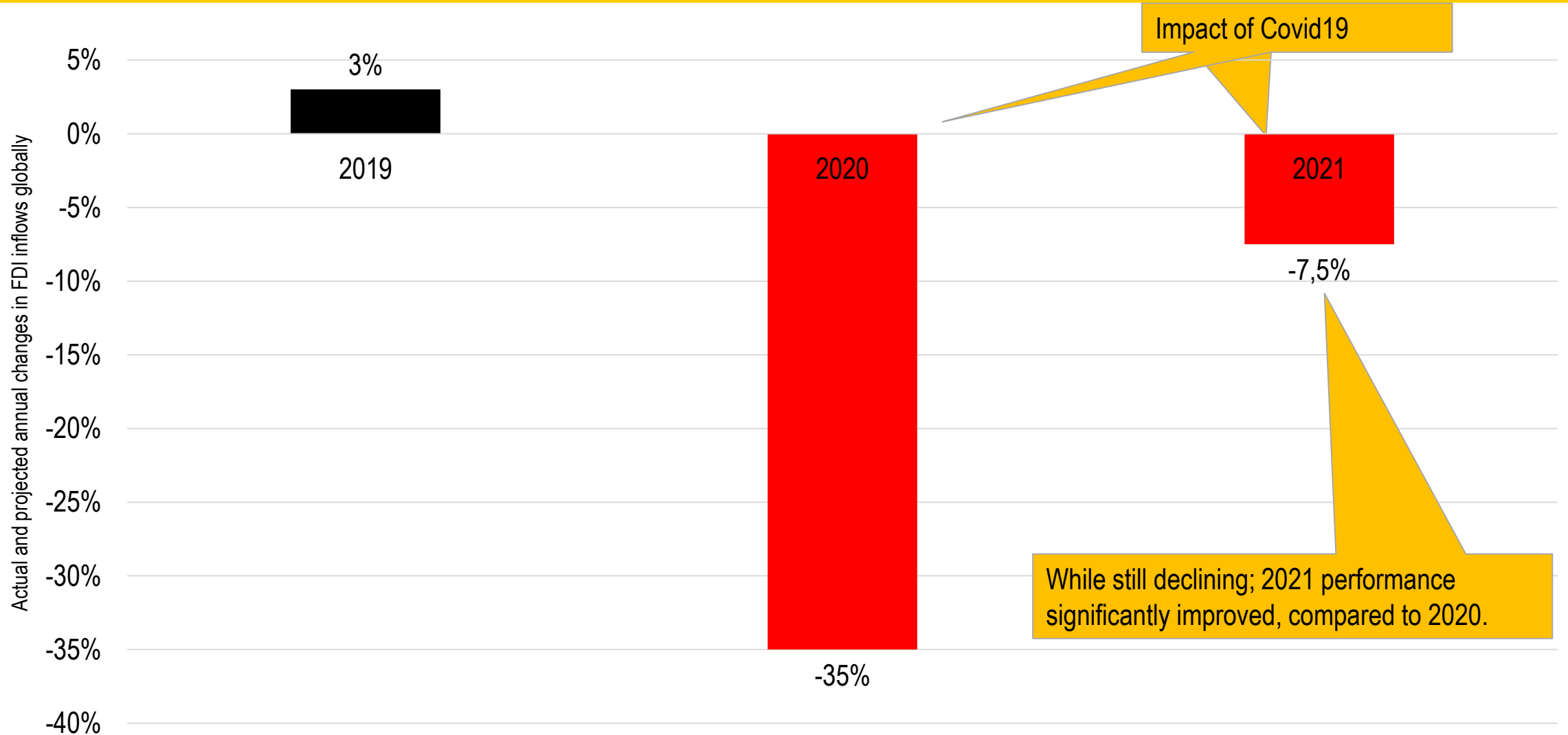
Human  
Development

**9th**



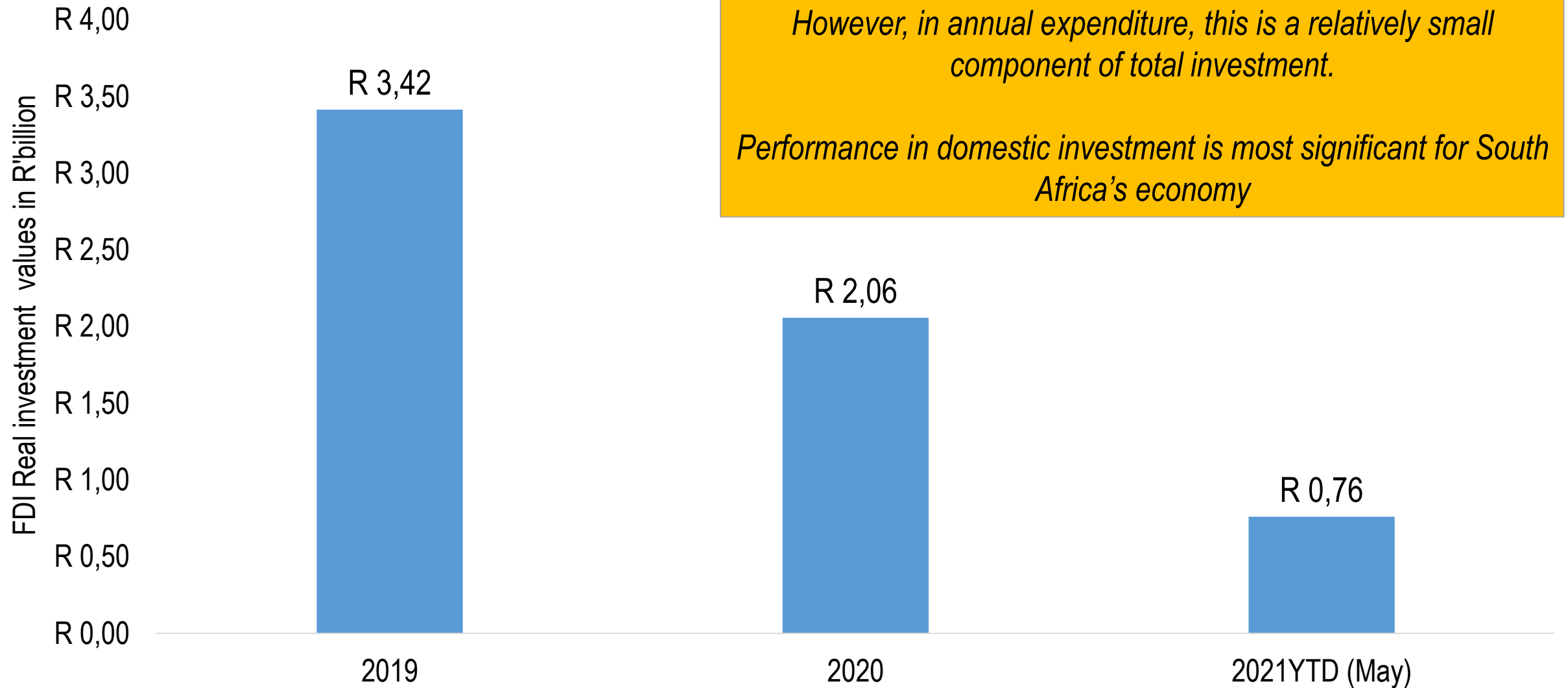
# GLOBAL INVESTMENT OVERVIEW

## SUSTAINED TREND OF DECLINING INVESTMENTS GLOBALLY



# TRENDS OF FDI INTO SOUTH AFRICA

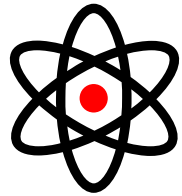
## DECLINING FDI INVESTMENT REPLICATED NATIONALLY



# HOWEVER, INVESTORS HAVE MADE MAJOR COMMITMENTS

## R110 BILLION IN INVESTMENT COMMITMENTS

ANNOUNCED IN NOVEMBER 2020



### Advanced manufacturing

*Sasol, Claritier, Fuchs, Bradley Aviation*

R 6,12 bn



### Agro-processing

*Sundale Schreiber, Lactalis, Frimax, Sinayo Group, Dr Oetker*

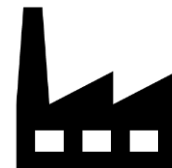
R1,28 bn



### Automotive

*Metair and Supavut*

R1,29 bn



### Manufacturing

*Proctor & Gamble, PG Bison, Sonae Auroco, Dangold, PepsiCo, SEW Eurodrive*

R8,97 bn



### Oil & Gas

*Mnambithi Terminals*

R1,3 bn



Source: Invest South Africa, 2021



# MAJOR NATIONAL INVESTMENT ANNOUNCEMENTS

*51 PROJECTS, 51 INVESTORS, 13 SECTORS AND 9 PROVINCES*

ANNOUNCED IN NOVEMBER 2020



## Metal Fabrication

*Scaw Metals, United Heavy Industries, Unica Iron & Steel, SA Steel Mills*

R2,35 bn



## Private financial institutions

*Sanlam and Old Mutual*

R10,88 bn



## ICT

*Capita, Teraco, Telkom, Provenance, Google, Dimension Data*

R16,21 bn



## Mineral beneficiation

*Sail Ferro Alloys, Anglo African Metals, Afrimat, Ivanplats, Mapochs,*

*Sandvik/Equites*

R2,24 bn



## Other collective announcements

*Belgian companies*

1,5 bn



Source: Invest South Africa, 2021

# MAJOR NATIONAL INVESTMENT ANNOUNCEMENTS

*R773,6 BILLION IN 3 YEARS AT SA INVESTMENT CONFERENCE*

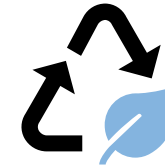
ANNOUNCED IN NOVEMBER 2020



## Tourism, Leisure & Property

*Divercity and Thukela Lifestyle resort, Amdec, Blythedale Coastal estate, Akani, Port Shepstone, Robert Jurgens, Giant Flag, and Really Epic Dog*

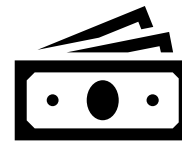
R15,93 bn



## Green Economy

*The Sola Group and Solar Africa*

R570mn



## Development Finance Institutions

*NDB and IDC*

R40,98 bn



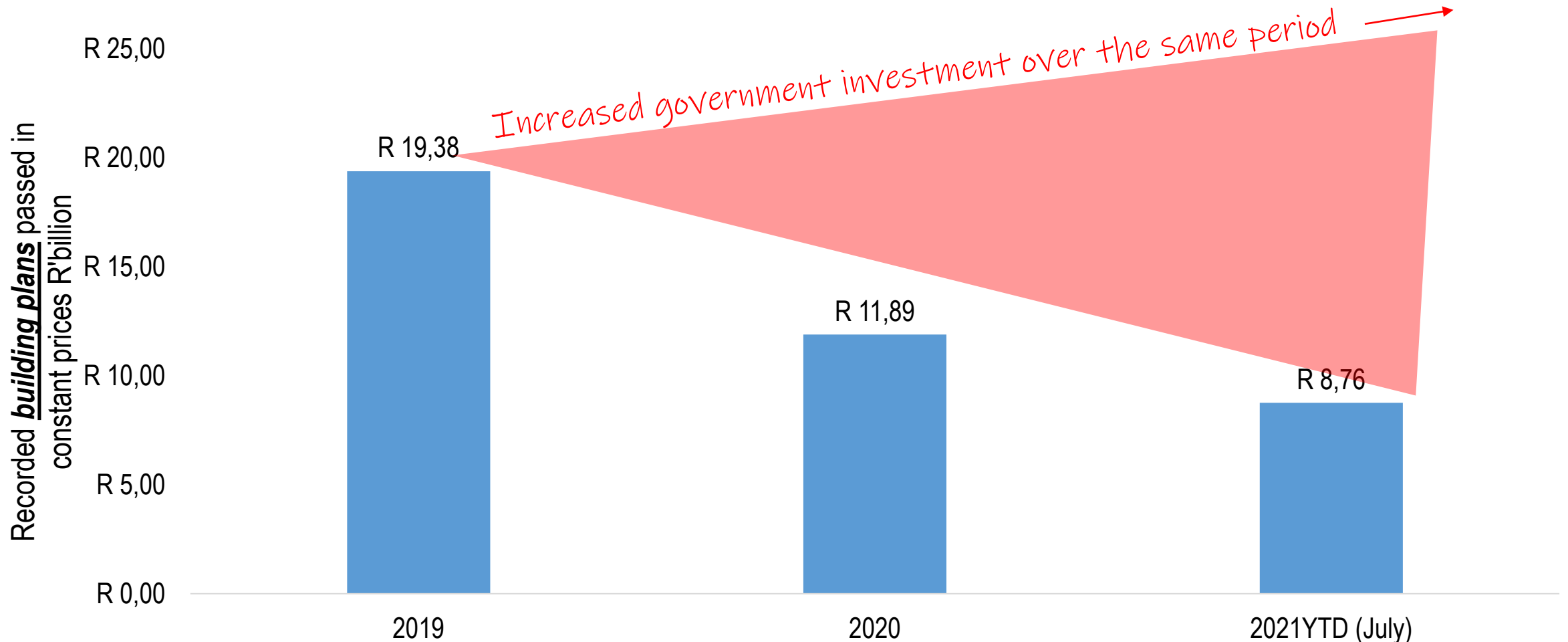
Source: Invest South Africa, 2021

# TRENDS OF PLANNED PRIVATE SECTOR INVESTMENTS IN SA

## DECLINE IN COMMERCIAL AND INDUSTRIAL INVESTMENTS



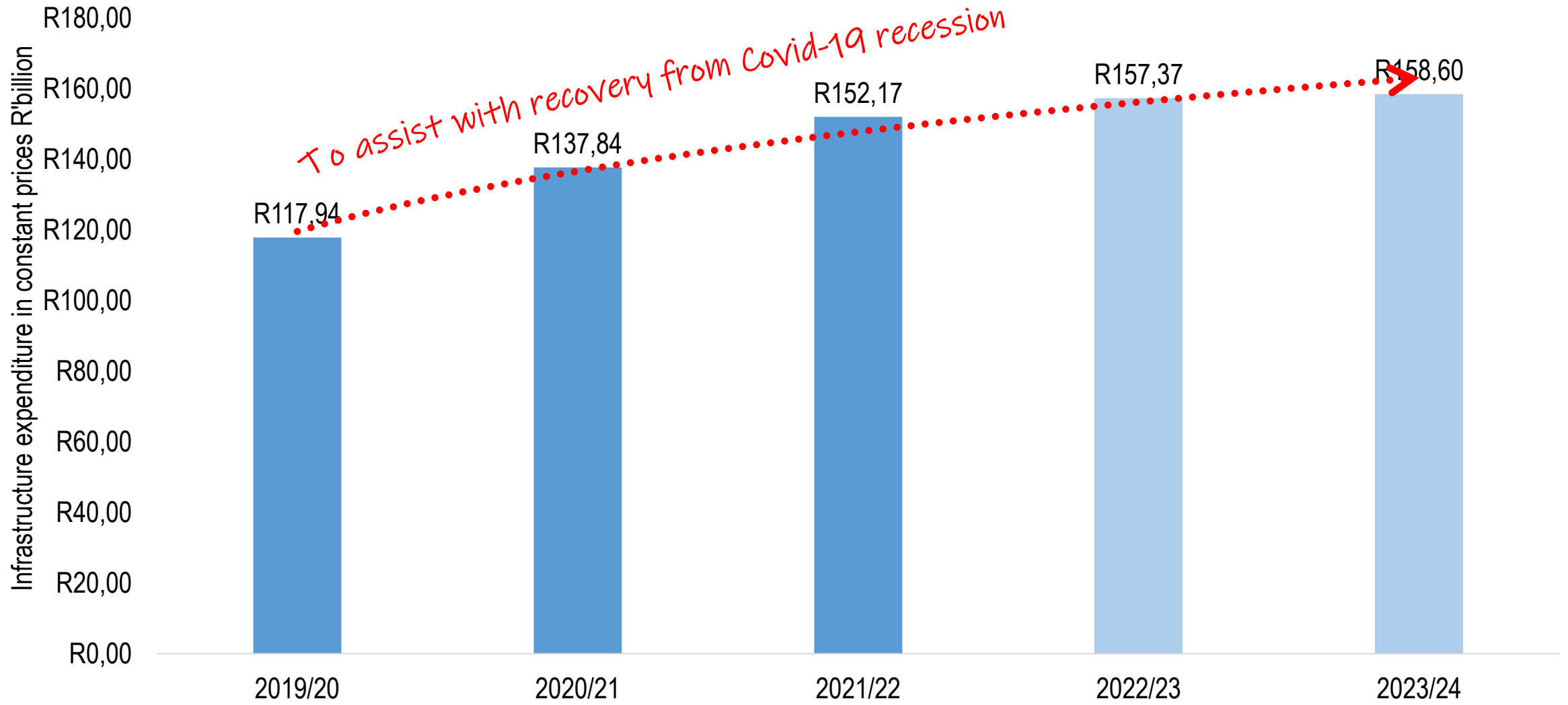
However, government appears to have responded to this drop with increased investments in infrastructure, on average increasing infrastructure investment by more than double this decline





# GOVERNMENT INFRASTRUCTURE INVESTMENT PLANS

## STRATEGIC INCREASE IN INFRASTRUCTURE SPEND



**HIGHLIGHTS OF  
THE 2050 NATIONAL  
INFRASTRUCTURE  
PLAN**  
*SELECTED 3 YEAR GOALS  
IN ENERGY AND FREIGHT  
GOOD NEWS!*



## Energy

- **Restructuring of Eskom:** Eskom will be restructured into three legally separated entities for generation, transmission and distribution
- **Enabling self generation:** Commitment to lift the self-generation license limit from 1MW to 100 MW enabled.
- **Procuring renewable energy:** Procurement of power from renewable IPPs of 3200 MW in one bid window in 2021. There will be procurement of 10,000MW from renewable IPPs in one window in 2022



## Freight Transport (rail, roads, ports, airports)

- **Turnaround of Durban Port etc:** Emergency measures to be implemented to turnaround decline in the Durban Port, Natal corridor and Gauteng link.
- **Development of dry ports:** Implementation on Cato Ridge and Tambo Springs will begin in 2021



Sources: DPWI: Infrastructure South Africa, 2021

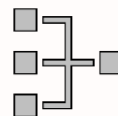
# HIGHLIGHTS OF THE 2050 NATIONAL INFRASTRUCTURE PLAN

## SELECTED 3 YEAR GOALS IN WATER AND DIGITAL COMMS



### Water

- **Agency to manage water resources:** The National Water Resources Infrastructure Agency will be established and functioning
- **Water licensing addressed:** The water licensing backlog will be addressed
- **Climate change prioritised:** A strategy for climate change mitigation will be finalised.



### Digital Communications

- **Internet connection in public sector:** 80% of public buildings, especially schools, health facilities and police will be connected
- **Digitisation of service delivery:** Government will identify three top-priority pilots where PPPs are used to introduce overarching digital modernisation. Examples are policing, health, education, water and smart cities.



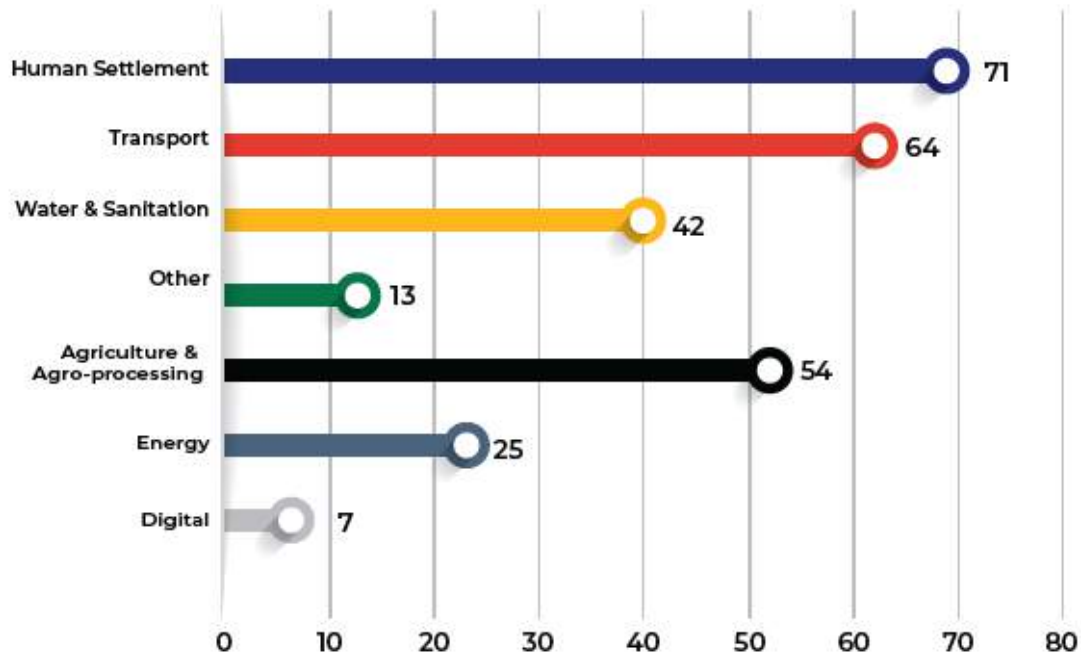
# SUSTAINABLE INFRA DEV SYMPOSIUM – '20 & '21

([WWW.SIDSSA.ORG.ZA/PROGRAM](http://WWW.SIDSSA.ORG.ZA/PROGRAM))

## We're thinking BIG

Strategic, informed, and ambitious interventions are needed to transform South Africa's economy. Our decisions and infrastructure investment focus is being guided by consultations with experts, stakeholders and potential partners. We are evaluating more than 270 projects with a total investment value of R2.3 trillion (approx. USD 140 billion). Taken together, these projects can create more than 1.8 million direct and indirect jobs through their lifecycle.

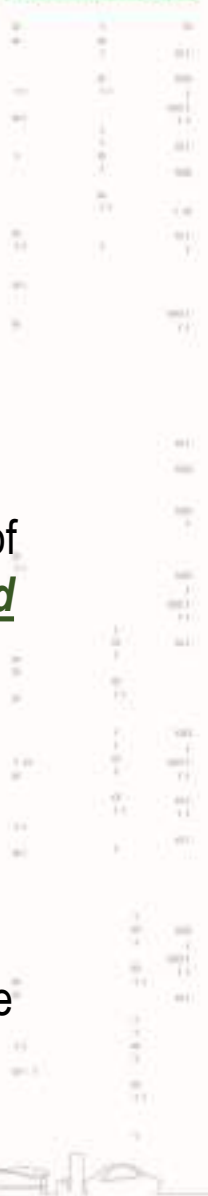
SECTOR ALLOCATION OF PROJECTS SUBMITTED



# KPMG South Africa & BLSA 2021 CEO Outlook (2021 Global CEO's Survey )

Here is what they  
have to say

- Chief executives are increasingly optimistic about the outlook for their own business, and despite the delta variant of Covid-19 slowing down the 'return to normal', their confidence in both the global and local economy has returned to levels not seen since the start of the pandemic.
- The data shows that 82% of CEOs are confident about growth prospects for the country over next 3 years, and overall confidence has returned to pre-pandemic levels of early 2020. Notably, 90% of local bosses are optimistic about the growth prospects of their own companies, compared to 87% of chief executives internationally.
- The local economy is forecast to grow at around 2% in 2022, and with the prospect of a more robust global economy, many CEOs are looking to invest in expansion and business transformation.
- The survey shows that 62% of senior executives are identifying inorganic methods – such as joint ventures, M&As and strategic alliances – as their organization's primary strategy to support growth.
- Most local leaders (88%) also stated that they expect aggressive growth and are looking to make acquisitions in the next three years to facilitate this and transform their businesses, closely aligned to the global average of 87%.





# KPMG South Africa & BLSA 2021 CEO Outlook (2021 Global CEO's Survey )



CEO Outlook Survey Results - Key Data Points		
	SA CEOs	Global CEOs
Growth Prospects for own Company	90%	87%
Organic Growth	72%	76%
Inorganic Growth	28%	24%
Top priority to achieve growth objective: Advance the digitisation and connectivity of all our functional areas	38%	26%
Greatest impact corporate purpose will have over 3 years:		
1. Driving financial performance	90%	89%
2. Shaping our capital allocation, partnerships, alliances and M&A strategy	90%	86%
Demand from stakeholders for increased reporting and transparency on ESG issues today.	70%	58%
Our organisations digital and ESG strategic investments are inextricably linked.	90%	76%
With company reputation closely tied to having a trusted CEO, how willing would you be to take the following actions to demonstrate personal integrity?		
Divest a profitable part of the business that was damaging our reputation.	82%	72%
Invest to develop secure and resilient cloud-based technology infrastructure is a key step to build digital resilience over the next 3 years.	56%	40%

# ALL HITS OF DURBAN



Durban's "Super 7" are the seven key reasons Durban is attractive to Business & Leisure visitors. The acronym, '**ALL HITS**' has been coined for easy recall.

- 1. Award winning Municipality.** We have the best run and financially strongest local government on the continent. Awards are bestowed through the likes of the PMR awards – recognising Durban as being the best-run city in South Africa, with nearly 29 000 employees.
- 2. Lifestyle of business, sports and event pleasure together.** This is a place to live, work *and* play. We are blessed with a truly sustainable lifestyle, sporting, events, and sense of sustainable business.
- 3. Largest Human Resources base.** We have Africa's 2<sup>nd</sup> largest direct contact University based in Durban, the University of KwaZulu-Natal, with over 45,000 direct contact tertiary students of African, Asian, European & Middle Eastern decent.
- 4. Higher growth rates.** Our economic growth rates are higher than the country's average, and that of other major centres, prior to the financial crises, in the region of +/-5%. We're targeting in that range again, & as a global Port City the tide is in our favour. This impacts positively on Business Confidence Levels, fixed capital formation, etc. As most analysts would observe, "the growth trend is *our* friend" in Durban.
- 5. Infrastructure Leader.** Durban has the best electricity distribution on the continent, a vast roads network, best water supply base, & telecomm's via various fibre optic networks. We have reasonable amounts of available vacant land at realistic prices across our 2 300 km<sup>2</sup> City. At our infrastructure heart, Durban leads the continent in terms of port infrastructure, with SADC's busiest harbour, plus the expanded King Shaka International Airport & Aerotropolis, with MORE to come.
- 6. Tourism Crown.** Durban is the largest domestic tourism destination in South Africa with abundant accommodation across all grading's; Access to the Beaches, Bush, Battlefields, Berg, etc. On both Business & leisure fronts, we have successfully hosted many high profile events.
- 7. Substantial, & most Sustainable diversified business base** already in place across the primary, secondary and tertiary sectors. Over 65% of the Province's GGP is produced in Durban. Business is clustered around the manufacturing, tourism, services, ICT, maritime & logistics, plus agri-industries. Having the second largest concentrated business & industrial base in SA provides many options for suppliers, support services, customers, and employees - all important factors of production.

# THANK YOU



@investdurban

CITY THAT'S  
**GEARED  
FOR GROWTH**