

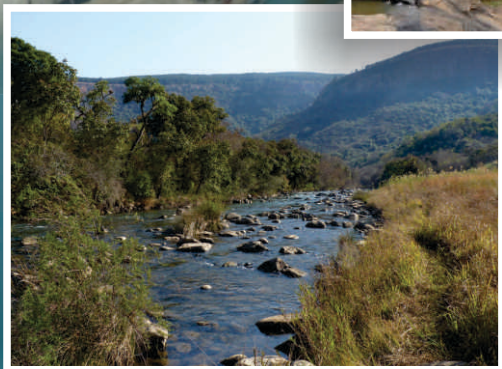


**water & sanitation**

Department:  
Water and Sanitation  
REPUBLIC OF SOUTH AFRICA

# CONTINUATION OF WATER REQUIREMENTS AND AVAILABILITY RECONCILIATION STRATEGY STUDY FOR THE MBOMBELA MUNICIPAL AREA

Economic Growth and Demographic Analysis Report



**FINAL  
JUNE 2018**



**water & sanitation**

Department:  
Water and Sanitation  
REPUBLIC OF SOUTH AFRICA

# **CONTINUATION OF WATER REQUIREMENTS AND AVAILABILITY RECONCILIATION STRATEGY FOR THE MBOMBELA MUNICIPAL AREA**

## **ECONOMIC GROWTH AND DEMOGRAPHIC ANALYSIS REPORT**

**JUNE 2018**

| <b>COMPILED FOR:</b>                                                                                                                                                                     | <b>COMPILED BY:</b>                                                                                                                                                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Department of Water and Sanitation</b><br>Contact Person: K Mandaza<br>Private Bag X313, Pretoria 0001<br>South Africa<br>Telephone: +27(0) 12 336 7670<br>Email: MandazaK@dws.gov.za | <b>BJ/iX/WRP Joint Venture</b><br>Contact Person: H Karemaker<br>Eastwood Office Park, Protea House<br>270 Lynwood Service Road, Pretoria<br>Telephone: +27 (0)12 745 2000<br>Facsimile: +27 (0)12 745 2001<br>email: <a href="mailto:hans.k@ixengineers.co.za">hans.k@ixengineers.co.za</a> |

# CONTINUATION OF WATER REQUIREMENTS AND AVAILABILITY RECONCILIATION STRATEGY FOR THE MBOMBELA MUNICIPAL AREA

## ECONOMIC GROWTH AND DEMOGRAPHIC ANALYSIS REPORT

**JUNE 2018**

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Economic Growth and Demographic Analysis Report.

### List of study reports

| Report Name                                     | Report Number | DWS Report Number           |
|-------------------------------------------------|---------------|-----------------------------|
| Inception                                       | 1             | P WMA 03/X22/00/6718        |
| <b>Economic Growth and Demographic Analysis</b> | <b>2</b>      | <b>P WMA 03/X22/00/6818</b> |
| Water Requirements and Return Flows             | 3             |                             |
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| Water Resources Analysis                        | 5             |                             |
| Infrastructure and Cost Assessment              | 6             |                             |
| Updated Reconciliation Strategy                 | 7             |                             |

**Title:** Economic growth and Demographic Analysis Report

**Authors:** Russel Aird and Nanja Churr

**Project Name:** Continuation of Water Requirements and Availability  
Reconciliation Strategy for the Mbombela Municipal Area

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**Consultants:** BJE/iX/WRP Joint Venture

**Approved for the Consultants by:**

 11/06/2018

G Talanda

Study Leader

---

**DEPARTMENT OF WATER AND SANITATION**

**Directorate National Water Resource Planning**

**Approved for the Department of Water and Sanitation by:**

 15/06/2018

K Mandaza

*Engineer: National Water Resource Planning (East)*

 18/06/2018

P Mlilo

*Director: National Water Resource Planning*

## EXECUTIVE SUMMARY

This Continuation of Water Requirements and Availability Reconciliation Strategy for the Mbombela Municipal Area (this Study) follows on the study *Water Requirements and Availability Reconciliation Strategy for the Mbombela Municipal Area (DWS, 2014)*. The overall objective of this Study is to systematically update, improve, and extend the Water Resource Reconciliation Strategy to cover the entire Crocodile River (East) and Sabie River catchments, in order for it to remain relevant, technically sound, economically viable, and socially acceptable and sustainable.

This Study is focused on the Mbombela Local Municipality (LM) (which previously comprised of the former Mbombela and the former Umjindi LMs) and the Bushbuckridge LM. Population projections up to 2040 at 5 year intervals have been determined for each of the 22 Water Supply Schemes (WSSs) that are located within the aforementioned municipalities.

In order to project population changes relevant information pertaining to the City of Mbombela and Bushbuckridge LMs was gathered from previous studies undertaken by the Department of Water and Sanitation (DWS), desktop research and further information gathering as well as discussions with relevant stakeholders and role-players. This process was undertaken to obtain additional information in determining the socio economic growth and status quo of the City of Mbombela and Bushbuckridge LMs.

The 2016 base population figure determined is similar to the latest official Statistics South Africa (StatsSA) data from the 2016 Community Survey. Discussions with municipal stakeholders revealed that the population size is potentially higher, which informed the need for the application of a higher scenario to the realistic base scenario figures.

The resultant projected population at local municipal level at 5 year intervals from 2010 to 2040 for the realistic and high growth scenarios are given in **Table (i)** below.

**Table (i): Municipal projected population per 5 years per growth scenario, 2010 to 2040**

| Municipality                        | Scenario  | 2010    | 2015    | 2020    | 2025    | 2030    | 2035    | 2040    |
|-------------------------------------|-----------|---------|---------|---------|---------|---------|---------|---------|
| Mbombela LM<br>(former) excl. rural | Realistic | 570 446 | 611 228 | 647 312 | 681 604 | 716 484 | 750 755 | 784 628 |
|                                     | High      | 570 958 | 625 675 | 682 826 | 733 699 | 783 528 | 831 715 | 882 311 |
| Umjindi LM (former)<br>excl. rural  | Realistic | 62 779  | 69 517  | 73 565  | 77 617  | 81 866  | 86 304  | 90 922  |
|                                     | High      | 62 778  | 72 397  | 79 961  | 85 420  | 91 072  | 96 842  | 102 925 |
| Bushbuckridge LM<br>excl. rural     | Realistic | 528 388 | 538 801 | 546 244 | 553 638 | 561 102 | 568 632 | 576 233 |
|                                     | High      | 528 388 | 548 854 | 569 644 | 590 126 | 610 294 | 630 120 | 649 579 |

The Economic Growth and Demographic Analysis Report, this Report, gives details on the comparison of the projected results with other relevant data sources, the distribution of the population per WSSs, average annual growth rates, projected number of households, etc.

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## LIST OF UNITS AND SYMBOLS

|    |            |
|----|------------|
| Ha | Hectares   |
| Km | Kilometres |
| %  | Percentage |
| R  | Rand       |

## LIST OF ABBREVIATIONS AND ACRONYMS

|         |                                                               |
|---------|---------------------------------------------------------------|
| CBD     | Central Business District                                     |
| DWS     | Department of Water and Sanitation                            |
| DM      | District Municipality                                         |
| EWR     | Ecological Water Requirements                                 |
| GDP     | Gross Domestic Product                                        |
| GDP-R   | Gross Domestic Product per Region                             |
| GGP     | Gross Geographic Product                                      |
| IDP     | Integrated Development Plan                                   |
| KNP     | Kruger National Park                                          |
| KMIA    | Kruger Mpumalanga International Airport                       |
| LED     | Local Economic Development                                    |
| LM      | Local Municipality                                            |
| LoS     | Level of Service                                              |
| Report  | Economic Growth and Demographic Analysis Report (this Report) |
| SBC     | Spot Building Counts                                          |
| SDF     | Spatial Development Framework                                 |
| SDP     | Spatial Development Plan                                      |
| SSC     | Strategy Steering Committee                                   |
| StatsSA | Statistics South Africa                                       |
| WSDP    | Water Services Development Plan                               |
| WSS     | Water Supply Scheme                                           |

# **1 INTRODUCTION**

## **1.1 Background to the Project**

A Reconciliation Strategy for the Mbombela Municipal Area was developed in 2014, the main objective thereof was to identify steps to be taken to ensure that sufficient water will, in the foreseeable future, be available to meet domestic and industrial water requirements in the Mbombela Municipal Area. The Reconciliation Strategy provided recommendations for the sequence of management and structural interventions required to maintain acceptable assurances of supply to domestic, and industrial water users in the Mbombela Local Municipality (LM). At the same time ensuring that the Ecological Water Requirements (EWR), the Reserve, and agreed international cross-border flows, lawful irrigation as well as that the needs of downstream users are not compromised.

For the Reconciliation Strategy to be implemented, and to remain relevant to properly fulfil its purpose into the future it must be dynamic. Hence the water balance must be continuously monitored and the developed Reconciliation Strategy must be regularly updated and maintained. This ensures that intervention planning can be implemented considering any changes that may have an impact on the projected water balance.

The Department of Water and Sanitation (DWS) commissioned the Continuation of Water Requirements and Availability Reconciliation Strategy for the Mbombela Municipal Area, including the Crocodile (East) and Sabie River Systems to facilitate a process to maintain the relevance of the Reconciliation Strategy.

## **1.2 Objectives**

The overall objective of Continuation of Water Requirements and Availability Reconciliation Strategy for the Mbombela Municipal Area, this Study, is to extend the Water Resource Reconciliation Strategy to cover the entire Crocodile River (East) and Sabie River catchments. As well as to systematically update and improve the Reconciliation Strategy so that it remains technically sound, economically feasible, and socially acceptable and sustainable.

## **1.3 Study Area**

The Study Area for the First Phase Water Requirements and Availability Reconciliation Strategy Study for the Mbombela Municipal Area Study (DWA, 2014) was increased to

include the entire Crocodile River (East) and Sabie River catchments as shown in **Figure 1-1** below.

The main catchment and rivers within the Study Area run along the southern and northern edges of the City of Mbombela LM and Bushbuckridge LM. **Figure 1-2** reveals that the agreed demographic focus area, for this Study, is the City of Mbombela LM (which previously comprised of the former Mbombela and the former Umjindi LMs) and the Bushbuckridge LM. The towns in the agreed demographic focus area include the towns in and around Mbombela (formerly known as Nelspruit), Barberton and the areas in and around Bushbuckridge.

This Study is thus focused on the updating, refining, and reviewing detailed population and growth modelling on the agreed demographic focus area, namely the City of Mbombela LM as well as Bushbuckridge LM as illustrated in **Figure 1-2**.

Higher level growth analysis have also been included for these LMs in the Crocodile River (East) Catchment and the Sabie-Sand Catchment, namely Emakhazeni LM, Nkomazi LM, and Thaba Chweu LM.

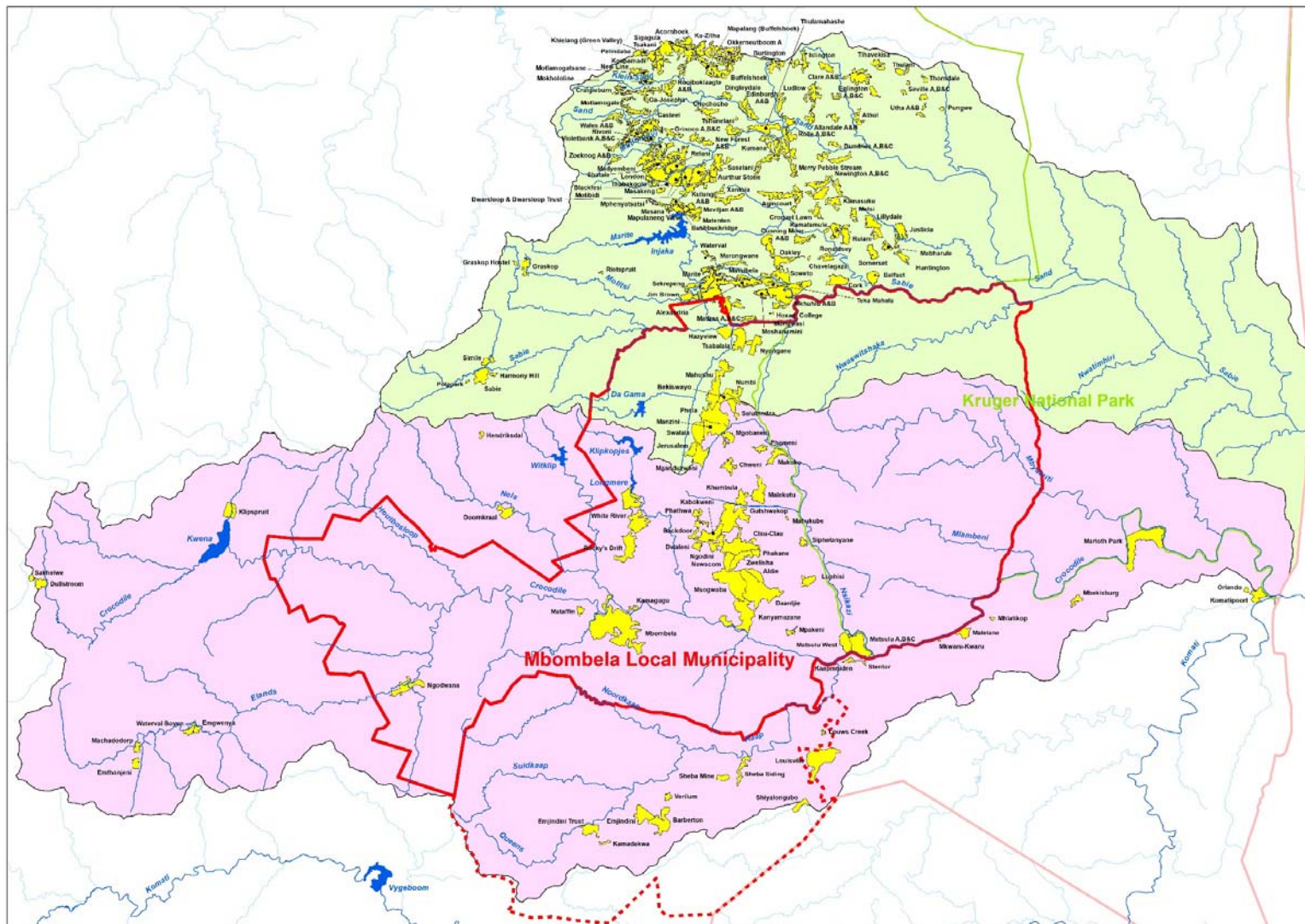
**Figure 1-4** reveals the broad Study Area, and clearly indicates the Water Supply Schemes (WSSs) within the demographic focus area, as well as the WSSs in the remainder of the broader Study Area. The broad Study Area covers these LMs: City of Mbombela LM, Bushbuckridge LM, Emakhazeni LM, Nkomazi LM, and Thaba Chweu LM.

## 1.4 Overview of Reconciliation Strategy Phase 1

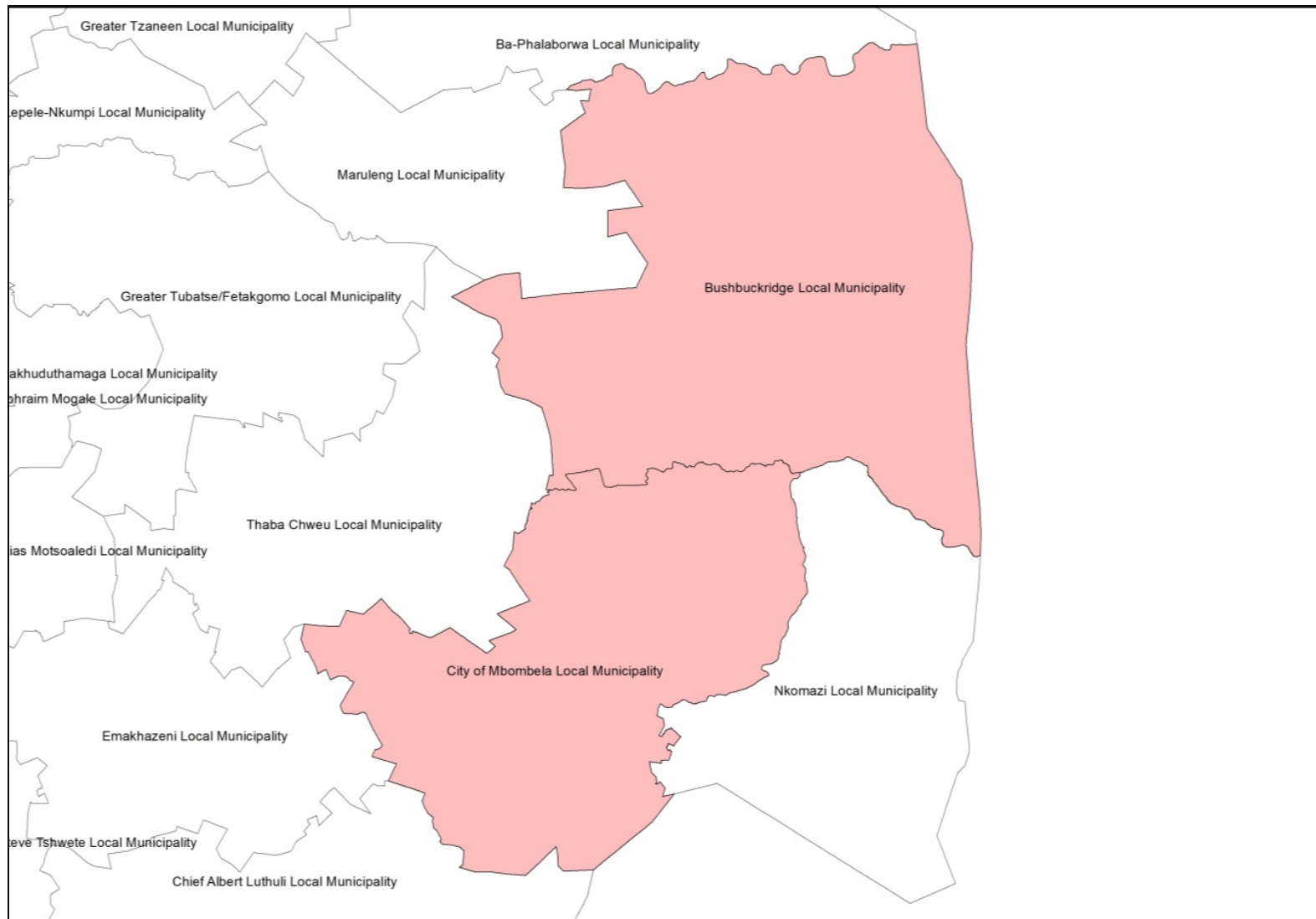
During the initial Reconciliation Strategy, the current socio-economic context of the Study Area was analysed, followed by the compilation of a status quo (baseline) database founded on information obtained from the following sources:

- Previous studies (including the previous DWS *Water Requirements and Availability Reconciliation Strategy for the Mbombela Municipal Area* (DWS, 2014));
- Demographic information from provincial, district and local documents;
- Spot Building Counts (SBC); and
- Statistics South Africa (StatsSA) Census 1996 and Census 2001.

Future 2040 population growth forecasts were then projected.



**Figure 1-1: Study Area main water catchments and river systems**



**Figure 1-2: Agreed demographic focus area**



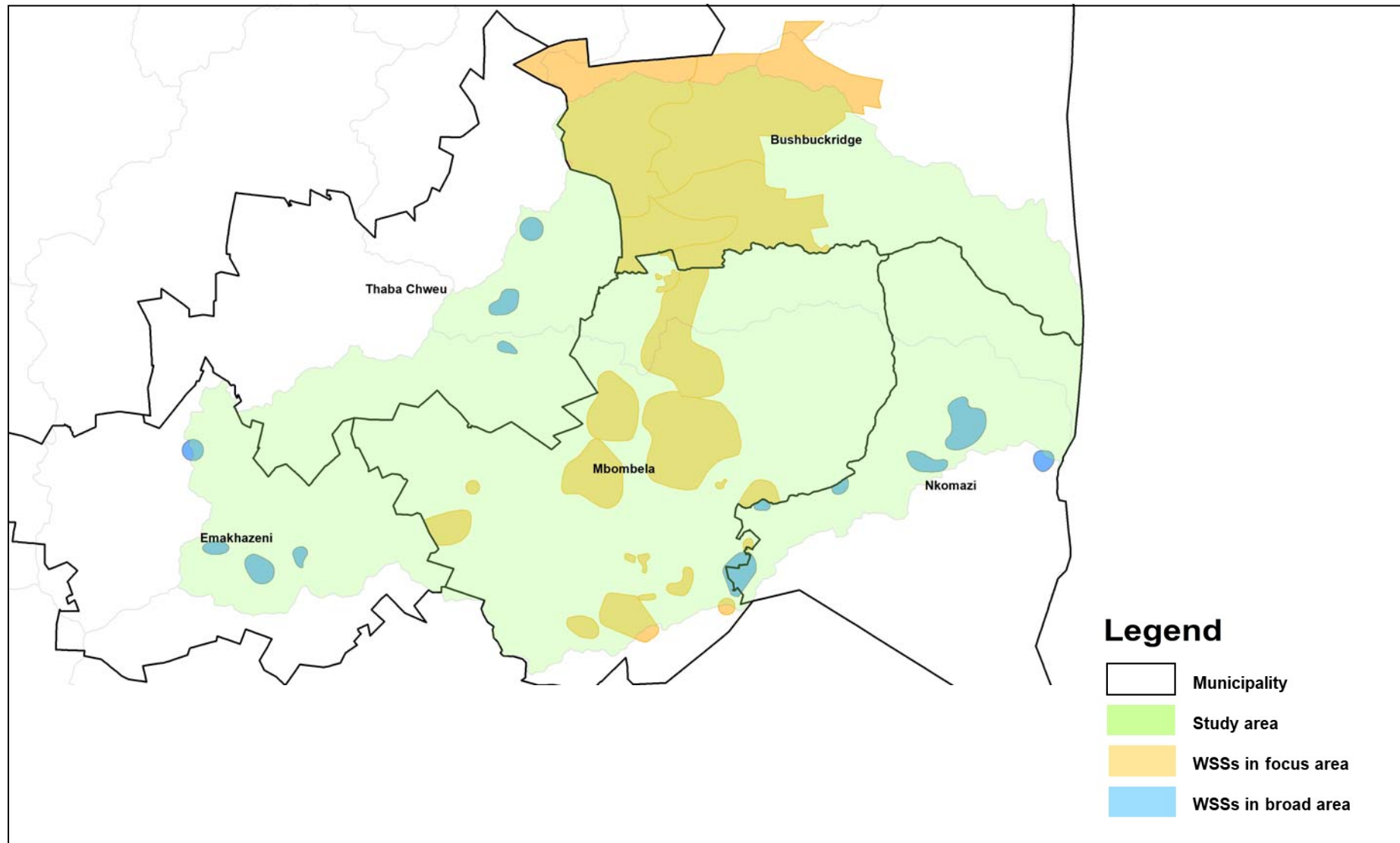
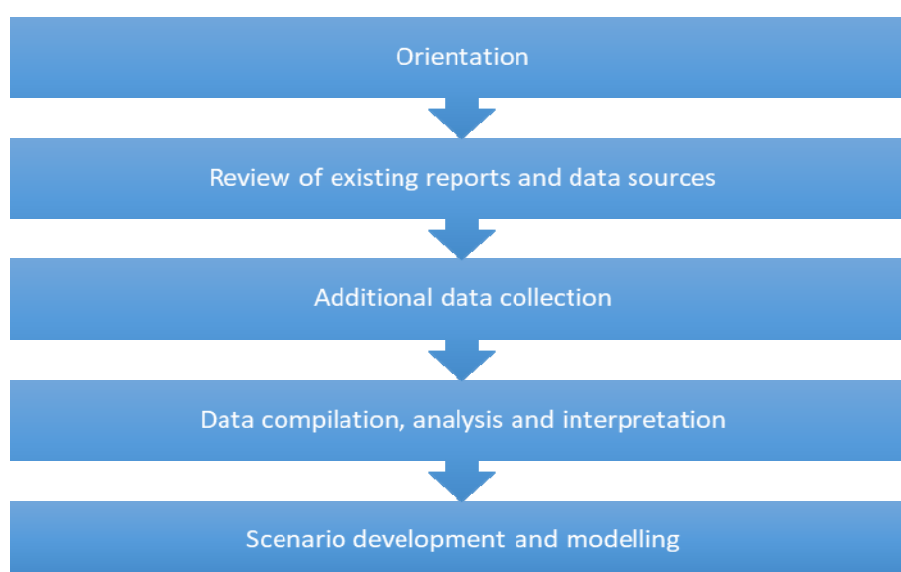


Figure 1-3: Broad Study Area

## 1.5 Purpose, Approach and Structure of this Report

The main aim of the Economic Growth and Demographic Analysis Task, this Task, is to estimate future water requirements based on updated population projections formulated specifically for the Study Area.

The Demographic Growth and Economic Analysis Process, the Process, is illustrated in **Figure 1-4** below, indicating the various steps involved in the compilation, extraction and analysis of socio-economic data necessary to provide an updated projection of future population projection.



**Figure 1-4: Demographic Growth and Economic Analysis Process**

### 1.5.1 Data gathering

The first step in the Process was to gather information relevant to the Study Area from previous studies that have been undertaken by the DWS (including the previous Water Requirements and Availability Reconciliation Strategy for the Mbombela Municipal Area (2014)) and other stakeholders. The intention was to extract all usable data from the reports and existing databases pertaining to especially demographic circumstances and forecasted growth patterns.

Additional data collection entailed the undertaking desktop research, in order to attain additional information crucial to determining the developmental and socio-economic growth potential and current reality status of the affected areas. The Process was initiated by undertaking desktop research, as well as field work in order to attain background information

on the relevant municipalities in the Study Area. This provided a good basis from which further information gathering and discussions were facilitated.

### 1.5.2 Desktop research

Desktop research was undertaken to gain insight into the current reality, and to facilitate discussions with the relevant stakeholders and role-players. The desktop research was conducted by obtaining plans and/or any other related information electronically from Local, District and Provincial Municipality websites. Major municipal plans that formed part of this research, for each of the municipalities were:

- Bushbuckridge LM Spatial Development Framework (SDF), (BLM, 2017a).
- Bushbuckridge LM Integrated Development Plan (IDP) 2017-2022, (BLM, 2017b).
- Bushbuckridge LM Local Economic Development (LED) Strategy, 2010 – 2014, (BLM, 2010).
- City of Mbombela LM IDP, (CoM, 2016a).
- City of Mbombela LM Draft LED Strategy, (CoM, 2016b).
- Draft Mbombela LM Vision 2030, (CoM, 2017).
- Umjindi LM IDP 2015/2016, (ULM, 2015)
- Ehlanzeni District Municipality IDP Review 2015/2016, (EDM, 2015).
- StatsSA Mid-year population estimates, 2017 (STATSA, 2017).

The above-mentioned documents were reviewed to obtain an overview of the municipalities in order to be able to compose relevant questions and points for discussion. Discussions with these relevant Municipal Departments were held, for each of the following municipalities:

- Mbombela City LM Planning and Development
- Mbombela City LM Strategic Planning
- Mbombela Local Economic Development
- Mbombela City LM City Planning and Development
- Mbombela City LM Land Use Management
- Mbombela City LM Economic Development Partnership
- Mbombela City LM Strategic Planning
- University of Mpumalanga
- Mpumalanga Department of Human Settlements
- Bushbuckridge LM Planning Department
- Bushbuckridge LM Local Economic Development

### 1.5.3 Additional data collection

Discussions with relevant Municipal Departments revolved around the dynamics and development patterns of the municipalities. These included discussions on municipal plans, current commercial, industrial and residential developments, housing projects, and proposed future developments.

### 1.5.4 Data compilation, analysis, and interpretation

A 2016 population base figure was compiled from the following information sources:

- Previous municipal plans for Mbombela, Umjindi and Bushbuckridge LMs;
- Demographic information from provincial, district and local documents;
- Spot Building Counts (SBC); and
- StatsSA: Census 2001, Census 2011, as well as Community Survey 2016.

The above information sources were consulted, since no official population figures exist for the Study Area for the required 2016 base year. For ease of reference and comparison to the available secondary data, reference is made throughout the remainder of this Report to the former Umjindi and the former Mbombela LMs, which are currently incorporated into the City of Mbombela LM.

This was followed by analysing the socio-economic status quo and interpreting the future growth of the City of Mbombela LM (previously known as Mbombela and Umjindi LMs) and the Bushbuckridge LM. With demographic statistics taken from StatsSA, Quantec and the Eskom SBCs as well as through discussions with the LMs, it was possible to project future growth and development expectations for the City of Mbombela and Bushbuckridge LMs.

### 1.5.5 Scenario development and modelling

The base population data was refined and growth scenarios up to 2040 were developed. The model used to project future growth produced realistic and high growth scenario results. These growth scenarios are based on detailed local information relating to structural economic changes, policy changes, income groups, strategic development projects, social dynamics, proposed housing developments, infrastructure developments, urbanisation and migration trends, as well as historical growth patterns.

Modelling was undertaken according to Water Supply Schemes (WSSs), which are each characterised by unique attributes and circumstances. Each individual geographic region or

WSS can be viewed as an area on its own, which interrelates with the various other regions identified within the City of Mbombela and Bushbuckridge LMs. Each region had a specific growth forecast, based on information obtained from the plans and discussions with the LM role-players in the City of Mbombela and Bushbuckridge LMs, which determines the rate of population growth as well as the development of residential, commercial and industrial developments. The modelling process focused on population growth, of individuals (and households) and the distribution of these individuals within the City of Mbombela and Bushbuckridge LMs.

The remainder of this Report is structured as follows:

- **Section 2:** Socio-economic Overview of the City of Mbombela and Bushbuckridge Local Municipalities;
- **Section 3:** Historic Growth Perspective and Analysis;
- **Section 4:** Growth Scenarios and Projected Population;
- **Section 5:** Conclusions; and
- **Section 6:** Recommendations.

## **2 SOCIO-ECONOMIC OVERVIEW OF THE CITY OF MBOMBELA AND BUSHBUCKRIDGE LOCAL MUNICIPALITIES**

This section of the Report, is a contextual overview of the City of Mbombela and Bushbuckridge LMs. This includes a broad comparison of the aforementioned municipalities in relation to South Africa, the Mpumalanga Province, and the neighbouring District Municipalities (DMs). Furthermore, this section of the Report also gives an overview of the various development nodes, the current conditions and impact attributes, the directives and objectives of various plans, as well as the future developmental potential for the City of Mbombela and Bushbuckridge LMs.

### **2.1 National, Provincial and District Overview**

Both the City of Mbombela LM and Bushbuckridge LM are located within the Mpumalanga Province, which is located within the north-eastern region of South Africa. The Mpumalanga Province is bordered by the Limpopo Province to the north, the countries of Mozambique and Swaziland to the east, the KwaZulu-Natal Province to the south as well as the Free State and Gauteng Provinces to the west. These two municipalities are located within the north-eastern part of the Mpumalanga Province.

The City of Mbombela and Bushbuckridge LMs are located within the Ehlanzeni DM, which is one of three DMs within the Mpumalanga Province. The Ehlanzeni DM is bordered by the Limpopo Province to the north, the country of Mozambique to the east, the country of Swaziland to the south and the Nkangala and Gert Sibande DMs to the west.

### **2.2 Overview of the City of Mbombela Local Municipality**

In 2016, the Mbombela LM was amalgamated with the Umjindi LM, which formed the City of Mbombela LM. The City of Mbombela LM thus spans from Swaziland in the south, to Bushbuckridge LM in the North, Nkomazi LM in the east and Thaba Chweu LM in the West. The City of Mbombela LM shares a border with the Kruger National Park (KNP) and Chief Albert Luthuli LM within the Gert Sibande DM.

Part of the Drakensberg Mountain Range is also located within the City of Mbombela LM, and the LM can be divided into three physiographic regions namely, the highveld, the escarpment and the low veld. The City of Mbombela LM extends from mountainous areas in the west to gently sloping areas in the central, northern and eastern parts.

The City of Mbombela LM is the Capital City of the Mpumalanga Province, and the Head Office of the Provincial Government (the Legislature). The location and its status of a Capital City provide the City of Mbombela LM with a competitive advantage as a corridor for growth and development. The City has two airports, Kruger Mpumalanga International Airport (KMIA) to the north east, and the General Aviation Mbombela Airport to the south west. There are scheduled flights to Johannesburg and, less frequently, to Cape Town and other cities from the KMIA.

Furthermore the City of Mbombela LM also a home of the Government Research Institute for Citrus and Subtropical Fruits, and the Lowveld Botanical Gardens. The City of Mbombela LM is a major stopover point for tourists travelling to the KNP and to Mozambique.

The City of Mbombela LM is divided by the N4 highway which runs from west to east, and the R40 which divides the City of Mbombela LM from north to south. The main town of the City of Mbombela LM is Mbombela, formally known as Nelspruit, which functions as the main administrative and service delivery node within the City of Mbombela LM. Mbombela is also the administrative capital of the Mpumalanga Province and houses various provincial departments within its borders. Other nodes of importance are White River, which functions as a secondary node to Mbombela, Rocky Drift which functions as a regional industrial node and Hazyview, which is a local service delivery and tourism node within the City of Mbombela LM.

The City of Mbombela LM has nine (9) Traditional Authorities located along its eastern boundary adjacent to the KNP. Various nodes such as Kanyamazane and Matsulu are within this region, and the majority of the population of the City of Mbombela LM is located within the tribal regions. The majority City of Mbombela LM eastern area is part of the KNP and as such has various linkages to the tourism industry within the City of Mbombela LM.

The City of Mbombela LM has numerous infrastructure components of high quality, which enables linkages to various parts of the country, as well the neighbouring countries of Mozambique and Swaziland. Important infrastructure components include the Kruger Mpumalanga International Airport (KMIA), railway linkages to parts of South Africa, Mozambique and Swaziland, and the N4 Maputo Corridor that links Gauteng and Mbombela to the deep-sea port of Maputo.

The City of Mbombela LM has a wide variety of natural features such as diverse vegetation, varied topography and protected areas, which is in many cases linked to the tourism industry. There are protected across the City of Mbombela LM, which includes the KNP and

various conservation areas, natural heritage sites, as well as private and provincial nature reserves. Biodiversity within the City of Mbombela LM has been classified in accordance to the Mpumalanga Biodiversity Conservation Plan, which has indicated that:

- Irreplaceable areas are found within Crocodile Gorge and the western escarpment;
- Highly significant areas are found within the western regions of the City of Mbombela LM;
- Important and necessary areas are located between Lekgotla and Numbi, areas surrounding Rocky Drift and Mataffin and along the southern boundary of the municipal area; as well as
- Areas of little concern is located within the eastern parts of the City of Mbombela LM.

In addition to tourism, agriculture is a major land user within the City of Mbombela LM. The region, as a result of its sub-tropical climate, is highly suitable for the production of sub-tropical fruits such as bananas, oranges, mangos and avocados. The region also has various attributes related to grazing and game reserves which make it suitable for cattle and game farming. The Municipal SDF indicates that arable land that supports cultivation, grazing and forestry can be found in the central and eastern regions of the municipality. Grazing land is located along the north-south strip stretching from Hazyview to the Crocodile River and the western escarpment and highveld regions. Whereas, wilderness areas are found more in the Crocodile Gorge and southern regions of the City of Mbombela LM.

Furthermore, the land within the City of Mbombela LM is categorised in terms of its suitability and agricultural potential. The following areas of potential can be found in the City of Mbombela LM:

- **Very low potential** within the mountainous regions;
- **Low potential** within the regions of the KNP, Schoemanskloof, Ngodwana, Pienaar, Daantjie and north-east of Legogote;
- The majority of the City of Mbombela LM is considered to be **medium potential** agricultural land; and
- **High potential** within the Kiepersol region as well as along the Crocodile River and its tributary to the west,

There are various mineral deposits within City of Mbombela LM, and these include gold, chrysotile (asbestos) and limestone, which primarily occur along the escarpment within the western regions of the City of Mbombela LM. There are not worthwhile mineral deposits to be exploited within the City of Mbombela LMs central and eastern regions.



The two main identified corridors along which development occur within the City of Mbombela LM are the:

- Nelspruit-White River Development Corridor; and
- Eastern Development Corridor.

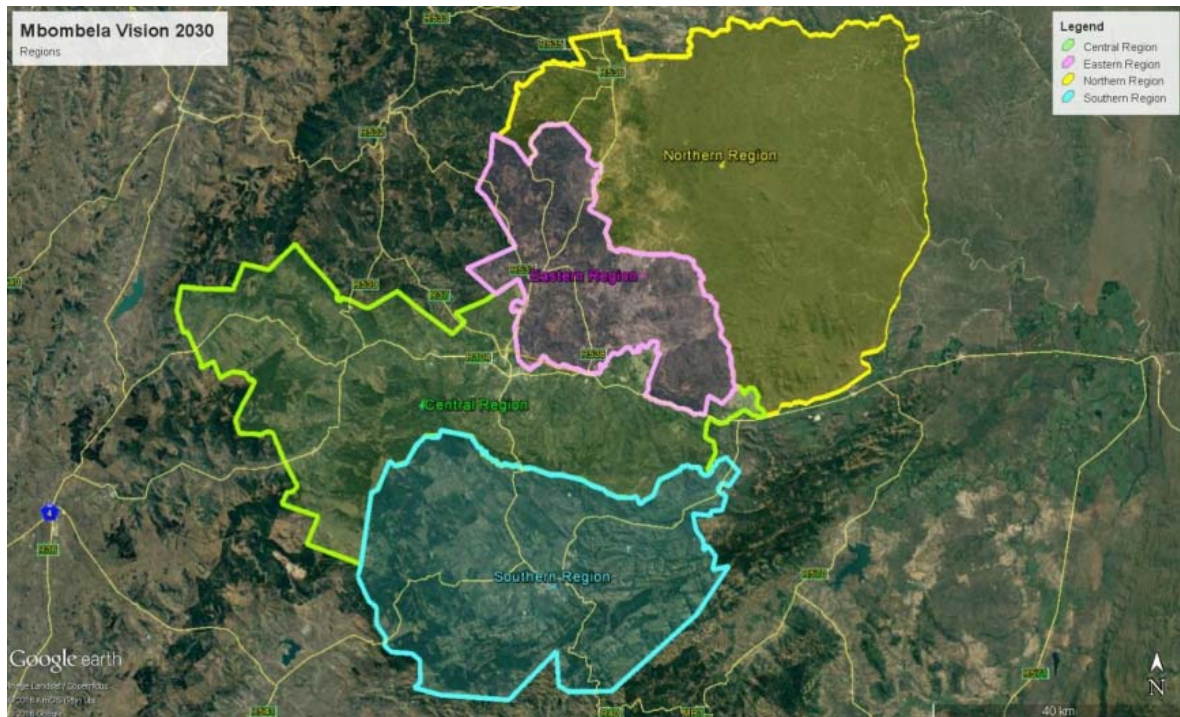
The Nelspruit-White River Development Corridor is located along the R40 in a northerly direction from Mbombela through Rocky Drift, White River and Hazyview. This corridor provides for structured urban growth in the towns through which it runs, while the above-mentioned nodes create an organised urban structure. Urban growth within the corridor has shown an expansion along the R40 from Mbombela to White River, which will link these two areas in the future as one continuous urban area.

The Eastern Development Corridor stretches from Hazyview in the north southwards towards Kanyamazane in the south to incorporate the Nsikazi Region. This corridor includes both urban and semi-urban structures and settlements within the Nsikazi Region, and growth within these settlements is sprawled in nature as the settlements are continuously expanding towards one another. Nodal development within this area is limited when considering employment and business and retail facilities, since the majority of such facilities are located within the western regions of the City of Mbombela LM. The uncontrolled growth also places much strain on the provision of services to the corridor area.

The City of Mbombela LM has forty-five (45) wards and four (4) regions. The regions include Central, Eastern, Northern and Southern Regions as presented in **Table 2-1** and **Figure 2-1: Map of regions within the City of Mbombela Local Municipality**

**Table 2-1: City of Mbombela Local Municipality Regions**

| Region   | Towns/Settlements                                                             |
|----------|-------------------------------------------------------------------------------|
| Central  | Mbombela, Kanyamazane, Piennaar, Daantjie, Nelsville, Mataffin and Elandshoek |
| Northern | Hazyview                                                                      |
| Eastern  | Nsikazi, White River, Kabokweni and Malekutu                                  |
| Southern | Barberton, Lowscreek and Matsulu                                              |



**Figure 2-1: Map of regions within the City of Mbombela Local Municipality**

An insight into prevailing development trends and patterns in each of the abovementioned regions, as well as future growth and expansion areas for residential, commercial and industrial development is provided in **2.2.1** to **2.2.4** below:

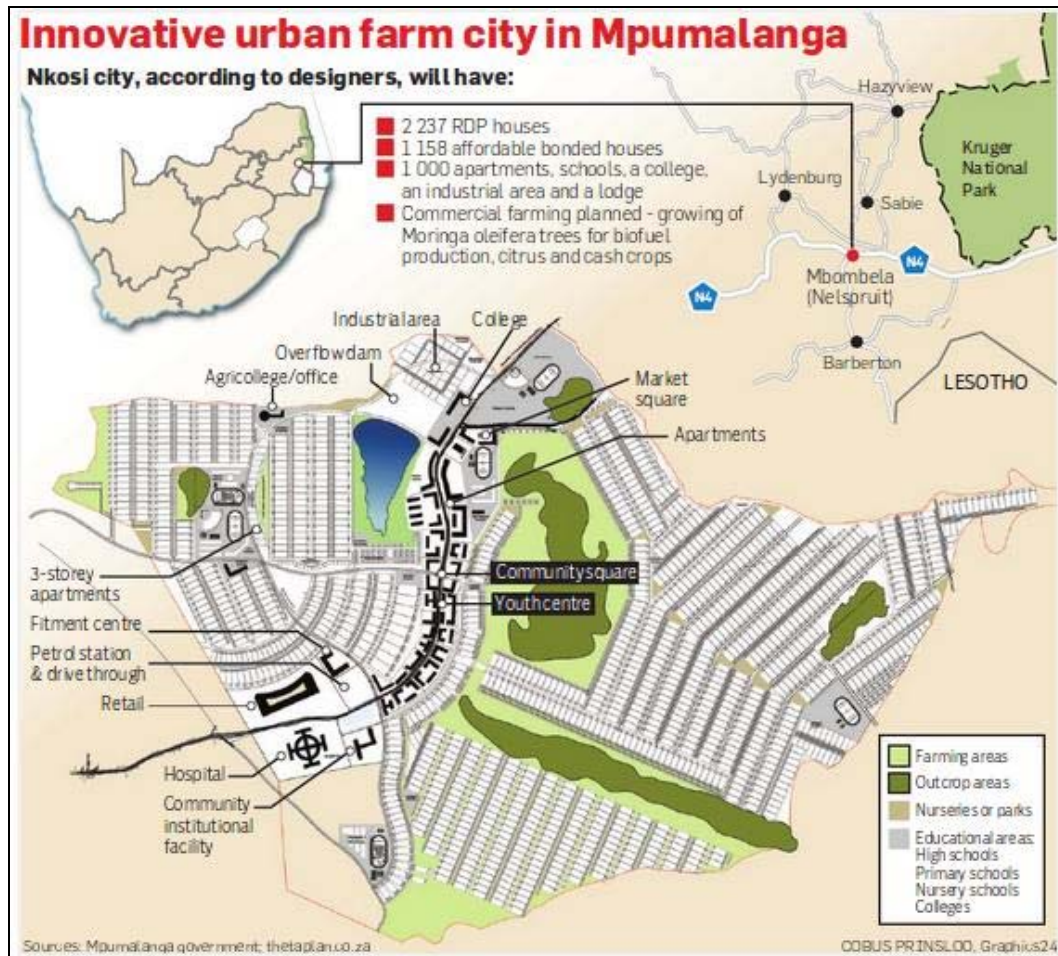
### **2.2.1 Central Region**

The Central Region functions as the main node for the City of Mbombela LM, servicing a broader area, which extends to Mozambique, Swaziland and Limpopo. The majority of development activity within the City of Mbombela LM is concentrated in and around Mbombela.

Mbombela has a large residential component, and residential expansion is evident in especially the northern parts of the town in the Riverside Area, to the east of the town around the Kamagugu Settlement, to the northeast of the town around the Mbombela Stadium, and to the south of the town in the Sonheuwel and Stonehenge areas. Future residential growth areas are located to the north-east of the Daantjie Settlement and east of the Phakane Settlement. Furthermore, there is also another identified growth region to the west of the Msogwaba Settlement. There is limited land for future expansion within the region, due to the typography, although just 22 km north of Mbombela lies Piennaar Settlement, the location of Nkosi City, which is a sprawling village with a mix of palatial, modest and rickety houses.

Nkosi City is also where the new and innovative R6 billion agricity development on 968 Ha of land is located. Furthermore, Nkosi City is proposed to accommodate the rich and poor, as is the case in Pienaar. According to the project developers, Nkosi city is in its initial stage, with the road construction already completed.

The proposed layout of the Nkosi City from the developers is depicted on the map in **Figure 2-2** below, unfortunately the City of Mbombela LM could not provide the approved plans.



**Figure 2-2: Map of the Proposed Nkosi City**

Commercial and industrial development is primarily located in the north and northeast of Mbombela within the Riverside and Mataffin nodes, which are located primarily along the major arterials of the N4 Highway and the R40 towards White River. The Riverside Node specifically focuses on commercial and mixed use activities, and provides high quality retail and office components, as well as larger scale retailers and automotive industries. Commercial development in the Mataffin Node was proposed along the N4 Highway and around the Mbombela Stadium, and will allow for mixed use activities specifically focused on retail and office developments.

Elandshoek, which is home to SAPPI Forestry and the Ngodwana Mill are located in the western part of the Central Region. The Ngodwana Mill produces 330,000 tons of paper pulp for own consumption, 210,000 tons of dissolving wood pulp and 380,000 tons of paper (newsprint and kraft linerboard used for packaging) per annum. Approximately 70% of the mill's product is exported and the balance is used locally.

The University of Mpumalanga is also located in the Central Region with the main campus situated at the Lowveld College of Agriculture and it also have two other campuses, namely the Hospitality School in Kanyamazane and the Siyabuswa Education Campus. However, the Education Campus is not located within the City of Mbombela LM's borders. The construction of the University is still in its first phase, the second phase will include onsite residential accommodation. The University of Mpumalanga aims to reach a target of 18,000 to 20,000 students by the year 2025/26.

Lastly, the construction of the proposed Mpumalanga Fresh Produce Market located along the R37 will provide the province's emerging farmers with a market for their produce, either locally or internationally, and give retailers and distributors access to fresh fruit and vegetables at their doorstep. A main feature of the Mpumalanga Fresh Produce Market will be the linking of small-scale producers and cooperatives (through the creation of agri-hubs) with the main market (with associated exposure to local, regional and international consumers) whilst improving the local supply logistics chain.

### **2.2.2 Northern Region**

The town of Hazyview is located at the northern most border of the City of Mbombela LM, and is approximately 75 km from Mbombela and 45 km from White River. The town functions as a sub-regional node servicing the local surrounding communities and the southern parts of the Bushbuckridge LM. Hazyview is functionally a tourism related node due to its proximity to the KNP and various other tourism attractions.

The main retail / commercial areas are located along the R40. No residential uses form part of, or are located next to, the town centre. A new shopping centre has recently been developed at the intersection of the R40 and R536 towards Holiday Town. The main tourism centre is located further to the north at the intersection of the R40 and the R536 towards Sabie.

Residential developments consist of:

- The Hazyview Holiday Town located to the north east of the Central Business District (CBD);
- The rural residential area of Shabalala located to the east of the Sandrivier, with access to Hazyview is via the R536;
- Leisure development located some distance to the north west of the Hazyview (Sabie River Sun), as well as
- Rural residential development to the south west and south east, including Nkambeni.

According to the City of Mbombela LM, development pressure is being experienced in the Northern Region, and to alleviate these various new townships are proposed, including:

- Residential development to the east of the Hazyview CBD up to the Sand River, including various phases of the proposed Hazyview extension 42;
- Retail / commercial, mixed use and industrial development along the R40, including proposed Hazyview extension 45;
- Residential development to the south of the Hazyview CBD, as well as
- Low density rural residential and tourism centred development are foreseen to the north of the Hazyview CBD.

Pressure also exists for the development of subsidised housing, and the official housing waiting list for the Northern Region amounts to 550 units.

### **2.2.3 Eastern Region**

One of the prominent nodes in the Eastern Region is White River, which is located approximately 20 km north of Nelspruit, 45 km south of Hazyview and 15 km west of the KMIA. The importance of White River as a residential node has grown considerably in the recent past, and has sparked the growth and development of residential development in and around the existing town. White River also includes the Casterbridge Tourism Node, which serves a major anchoring role, making it a popular holiday destination not only for locals but also for foreign tourists looking to experience the area scenic places. Furthermore, White River is also located around the R40 and in close proximity to the Panorama and Lowveld Legogote Tourism Routes as well as the KNP.

The areas around the White River CBD mostly consist of medium density residential development and small residential units clustered together. Rural residential developments

are located on the outskirts of the town. Both industrial and tourism opportunities are also evident, specifically towards the south and north-eastern part of White River.

In terms of future demand for land, the following was identified in water master planning in terms of major contributions from future proposed developments:

- **White River:** There is extensive residential development foreseen for this area, since there are many pending township applications. The Casterbridge is a business node with the potential for immediate developments and upgrading.
- **Phumlani:** When water became available, a number of informal settlements were established. Currently there are approximately 3 000 informal dwellings in this area, which are expected to increase to roughly 5 000. However, township layouts and applications were previously submitted for approximately 2 100 low-income housing type units.
- **Rocky Drift:** It is foreseen that the industrial land in Rocky Drift will expand, together with an increase in residential type developments in the area between Rocky Drift/Phumlani and White River.
- **Hillsvie:** A new industrial area south of Hillsvie is foreseen, and the expansion of the low cost housing area.

The Eastern Region also includes the Nsikazi Area, which comprise of a number of Traditional Authorities, and this area a mixture of rural, informal and semi-urban settlements. The tribal areas are located along the Nsikazi Activity Corridor, which stretches from Hazyview in the north to Kanyamazane in the south.

Various portions of land have been identified in the Nsikazi Area for future residential growth and expansion, which are mostly distributed along the Nsikazi Activity Corridor at settlements determined to be future nodes. Portions identified for future residential development are located within Tshabalala, north of Nkambeni, within Mahushu, east of Phola, south of Manzini, east and west of Khumbula, and within Ngodini. Additional land for subsidised housing was also identified in the area and is located in the settlements of Tshabalala, Nkambeni, Manzini A, Khumbula and Clau-Clau.

Commercial development is based on nodal development at strategic nodes to encourage commercial densification and intensification. No areas for future commercial growth are identified in the area, and small pockets of land for commercial development have been



identified at the R538/ Numbi Road Intersection at Bhekiswayo, along the R538 west of Lundi and at the D1411/D2970 Intersection at Khumbula.

The City of Mbombela LM's SDF has identified the development of tourism related activities, which include hotels, lodges and recreational and educational tourism. It is foreseen that these developments are to be established at the KNP's Phabeni and Numbi gates.

#### **2.2.4 Southern Region**

The Southern Region is characterised by the Barberton Area, formally within the Umjindi LM. The Barberton Mountain Land is the largest Archaean Greenstone Belt in South Africa. The Greenstone Belt contains some of the best-preserved and least altered early Archaean volcanic, sedimentary and igneous rocks on earth. The Greenstone Belt evolved some 3 200 million years ago, making it one of the oldest preserved remnants of continental crust on earth.

Mining has played, and is still playing, a significant role in the development of the Southern Region and provides more than 2 000 jobs. The most prominent mines include the three (3) Barberton Gold Mines, which are situated in Sheba, New Consort, and Fairview. Other mines known in this region include the Makhonjwa Mine and Agnes Mine, which are also gold mines. According to the City of Mbombela LM, Barberton has unique tourism potential that is not fully exploited. If sufficient accommodation facilities are developed then these could be a catalyst for developing other tourist facilities such as restaurant and entertainment developments, attracting more tourists to Barberton and the surrounding area.

The Matsulu area is also located in the Southern Region, between the Mthethomusha Nature Reserve in the north and west, the KNP in the east and the N4 Highway to the south. The Matsulu Area is situated approximately 45 km east of Nelspruit, and primarily functions as a residential area with basic services and economic activities to accommodate the local community.

Future growth regions have been identified within Matsulu C and to the west and south of Matsulu B. Commercial development in the Matsulu Area is focused on intensification of economic activities within the existing commercial nodes.

### **2.3 Overview of Bushbuckridge Local Municipality**

The Bushbuckridge LM is also located in Mpumalanga, within the Ehlanzeni DM. The Bushbuckridge LM borders Mozambique to the east, Ba-Phalaborwa LM to the north, the

Maruleng and Thaba Chweu LMs to the west, as well as the Mbombela and Nkomazi LMs to the south. The towns of Shatale, Dwarsloop, Thulamahashe and Mkhuhlu were established as towns for displaced people, and therefore the majority of the residents are originally from rural areas. The geographical area of Bushbuckridge is predominantly rural, including considerable land under Traditional Authorities. Mkhuhlu, Kildare/Kildare B, Agincourt/Ireagh, Alexandria A and Marite A are identified as rural nodes/service delivery nodes within the Bushbuckridge LM.

Unemployment and poverty are core challenges in the Bushbuckridge LM. Furthermore, the Bushbuckridge LM is characterized with a vast number of protected areas, including the KNP and various nature reserves covering approximately 815 000 Ha, which equates to about 80% of the Bushbuckridge LM's land area.

The Bushbuckridge LM is renowned for its agricultural and tourism attractions. The Bushbuckridge LM Area provides a link to economically viable centres in the Lowveld, particularly Hazyview, Hoedspruit, Pilgrim Rest and Graskop. The R40 provincial road passes through the Bushbuckridge LM starting from Marite to Acornhoek.

The Bushbuckridge LM Area can therefore be regarded as the gateway to the major tourism attractions in Mpumalanga and the south eastern part of the Limpopo Province. Bushbuckridge LM is characterised by high unemployment rate, poverty, unregulated influx by foreign nationals. In the past the Bushbuckridge LM was able to address the issue of social cohesion by ensuring that no placing of people along tribal belonging takes place. Furthermore, the Bushbuckridge LM is currently characterised and dominated by VaTsonga (Shangaans), the Mapulana Tribe (dialect from Sepedi) and Swati speaking people as indigenous inhabitants.

The Bushbuckridge LM is also an entry point to the KNP, Sabie Sands Reserve, Mhlahlala lodge and Timbavati Safari Lodge and has many provincial reserves. The Bushbuckridge LM forms part of the Kruger to Canyons Biosphere Reserve, with the Maputo sub-corridor cutting across the Bushbuckridge LM with a rail network that links Maputo and Johannesburg.

The Bushbuckridge LM is comprised of four (4) urban nodes, which are described in 2.3.1 to 2.3.4 below in terms of their prevailing development trends, development pattern and future growth and expansion areas:

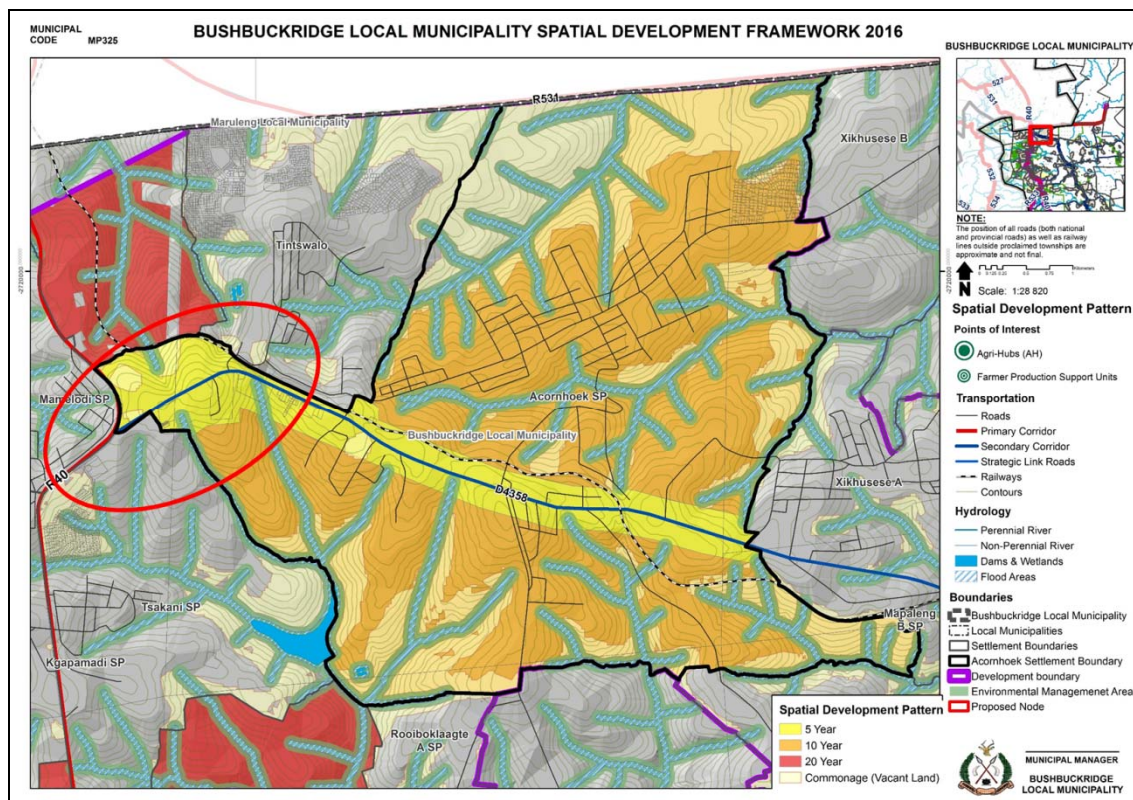


### 2.3.1 Acornhoek

Acornhoek is recognised as a growth point for industrial, commercial and retail development due to the R40 and the Nelspruit-Phalaborwa Railway Line and Stations which traverses the node. Acornhoek has industrial infrastructure, shopping centres as well as a range of formal and informal trade activities. Acornhoek has had a significant increase in formal and informal development, subsequently a need exists to create order in the node to guide future development over the next two to three decades.

Acornhoek is located on the watershed between the Crocodile (East) and Sabie River Systems. The majority of Acornhoek consist of residential development, with a cluster of business activities in the vicinity of R40 and D4358 Intersection. Future development intervention for the vacant land situated in the node is critical. The Bushbuckridge LM SDF indicates that there are nine (9) land parcels along the D4358 that could be considered for development as part of the Acornhoek Precinct.

**Figure 2-3** depicts the spatial representation of a 5 year Spatial Development Pattern (SDP), as well as 10 to 20 years desired spatial growth pattern.



**Figure 2-3: Acornhoek Current and Desired Spatial Development Pattern (BLM, 2017a)**

The following three (3) corridors traverse the Acornhoek Area:

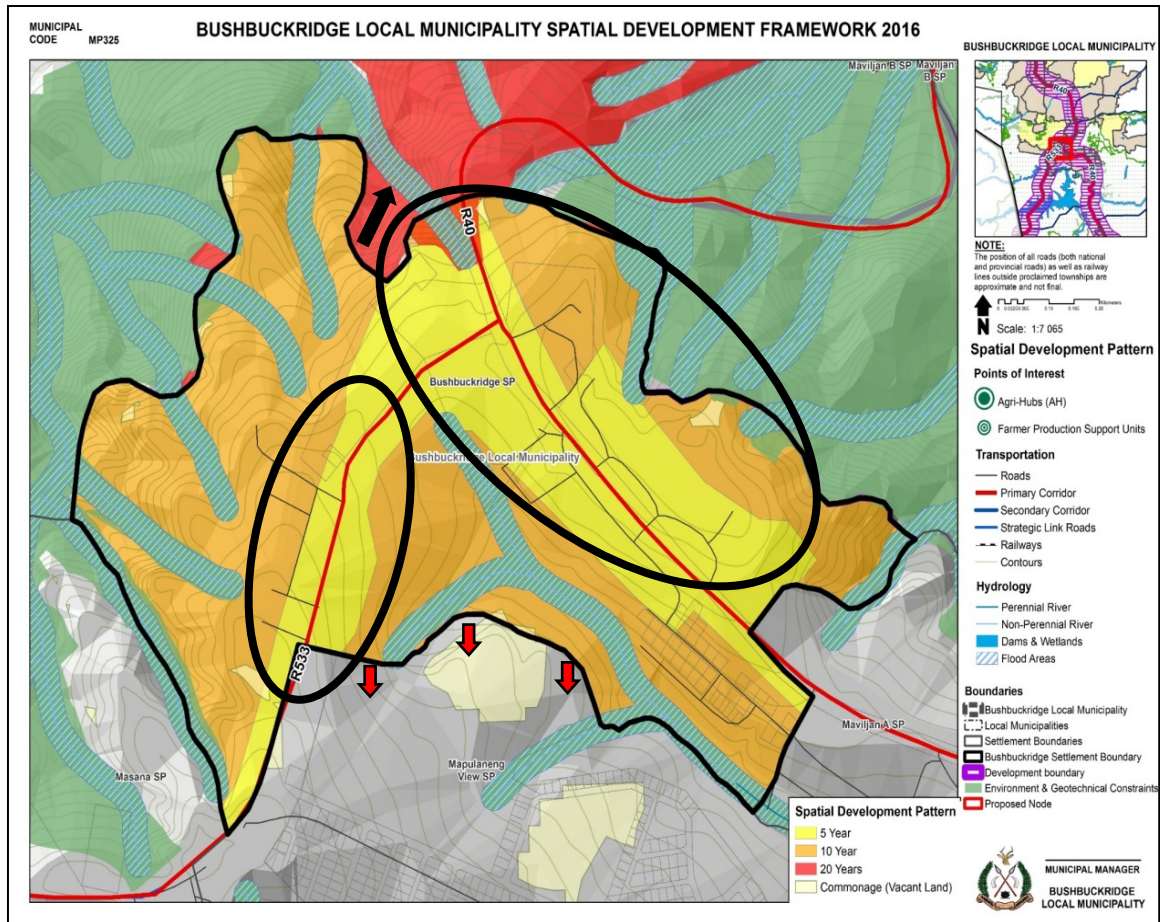
- The R40 identified as a primary transport corridor;
- The D4358 identified as a secondary transport corridor, and
- The Nelspruit-Phalaborwa Railway Line.

An activity street also runs from the D4358 to the east through the northern part of Acornhoek with linkages to the R531.

An opportunity for future expansion of Acornhoek is located to the west, across, and up along the railway and the R40 corridor. Between the railway and the R40 Corridor there are opportunities for business and commercial activities.

### **2.3.2 Maviljan**

**Figure 2-4** below depicts the spatial representation of a 5 year SDP, as well as 10 to 20 years desired spatial growth pattern.



**Figure 2-4: Maviljan Current and Desired Spatial Development Pattern (BLM, 2017a)**

Maviljan, alike the rest of the Bushbuckridge LM, is a water scarce area with only the Inyaka Dam as the main source of water to the area. Only business and commercial erven have direct water and formal taps, and the rest of the community uses communal taps. The portion of land that is devoted to public open spaces and rivers, helps to promote a pedestrian friendly environment that stimulates green spaces for parks and recreational areas.

Educational facilities, businesses and sport and recreational space co-exist in close proximity with the schools and medium density housing. This creates a precinct that is sustainable and caters for the Maviljan Community, where there is a significant population and potential workforce.

### 2.3.3 Mkhuhlu

There is significant industrial infrastructure exists in this area, and an industrial hub is proposed to concentrate bulk industrial and agri-processing activities. The Mkhuhlu Area is dominated by residential dwellings; medium density housing and existing residential developments. The Mkhuhlu Community has educational and community facilities within its jurisdiction. Along the R536 plans exist for business development as well as a proposed cultural village.

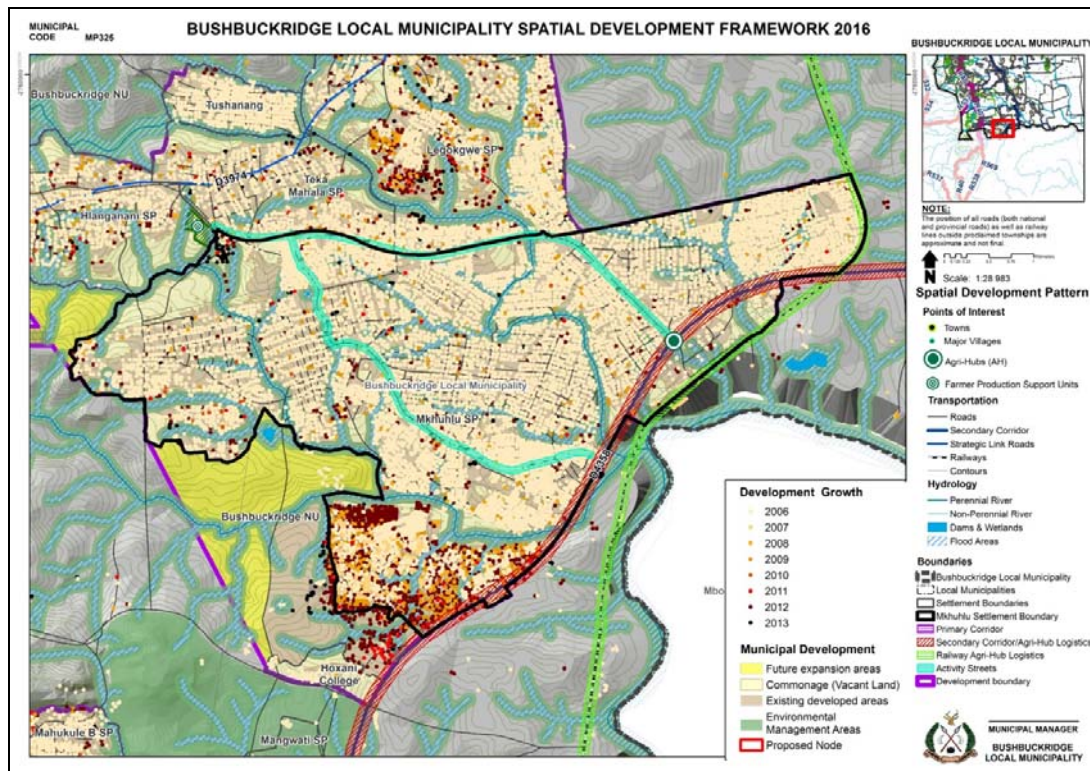
The existing community and trading facilities are in close proximity to the residential dwellings, and therefore the vision for Mkhuhlu is to promote a pedestrian friendly environment, encourage public transport and promote green spaces. The inevitable future population increase will, however, put in the existing open spaces under more pressure and their value as an asset for the Bushbuckridge LM will therefore increase.

On the outskirts, a few uses of agricultural value-adding such as production of fuel, fabrics and other essentials are identified to prosper agricultural development potential for the community.

The Mpumalanga Traffic Training College is also located in this precinct, this R300 million college, has a residence catering for 160 students.

**Figure 2-5** depicts the spatial representation of a 5 year SDP, as well as 10 to 20 years desired spatial growth pattern.





**Figure 2-5: Mkhuhlu Current Spatial Development Pattern and Future Expansions (BLM, 2017a)**

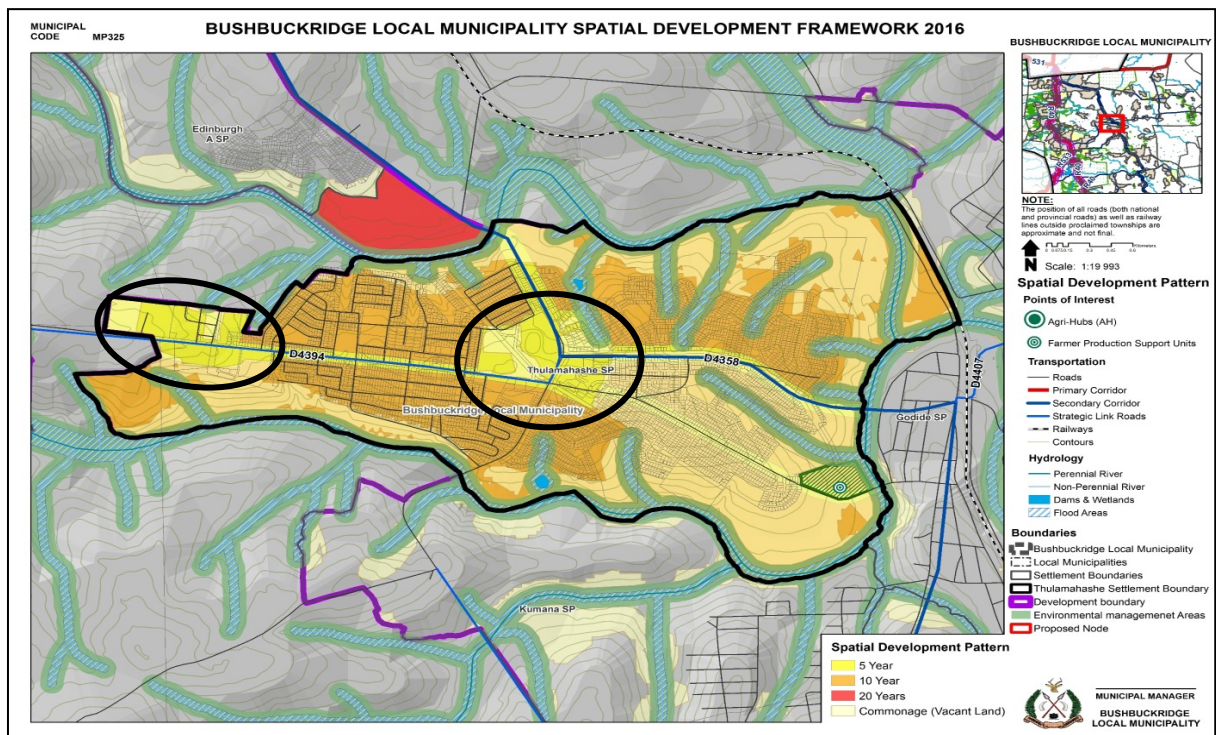
### 2.3.4 Thulamahashe

Thulamahashe is identified as an urban node that provides higher order functions to the broader community, and is surrounded by the Sand and Nwandlemuhari rivers flowing from Dumphries, around Thulamahashe and all the way to the east approaching Shatale and Rooiboklaagte. The node is divided by Kumani Road right where business activities, medium density housing and educational facilities are situated.

Business and educational facilities are in close proximity to the residential dwellings for accessibility reasons. The land along the Sand River as well on the outskirts of Thulamahashe is used for agricultural purposes. Densification is a priority in the Thulamahashe Area as all the land uses are compatible and in close proximity to one another.

Government and Municipal buildings are strategically situated along a pedestrianised street, which is meant to promote a pedestrian-friendly environment in order to stimulate green spaces for parks and recreational areas.

**Figure 2-6** below depicts the spatial representation of a 5 year SDP, as well as 10 to 20 years desired spatial growth pattern.



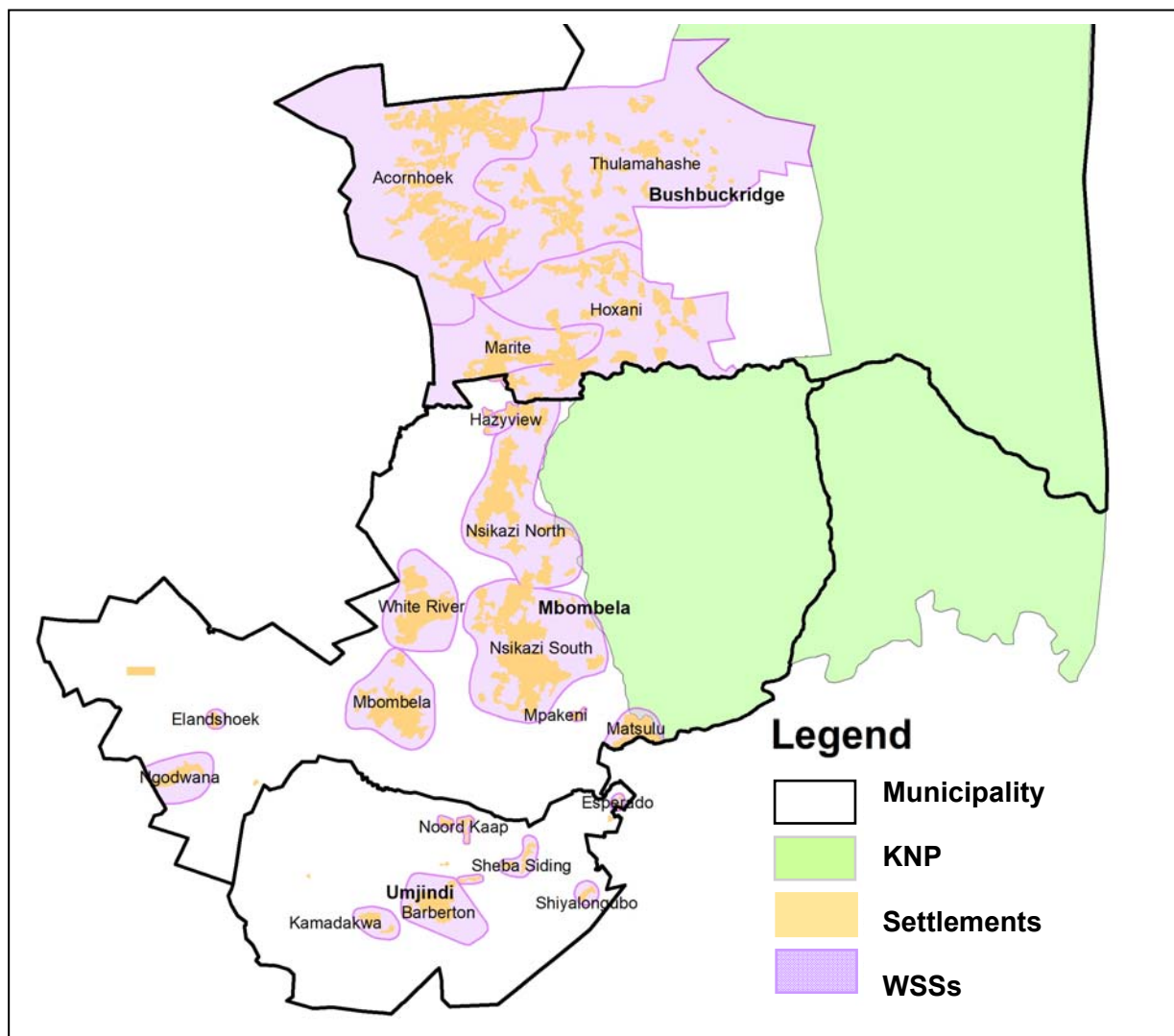
**Figure 2-6: Thulamahashe Current and Desired Spatial Development Pattern (BLM, 2017a)**

## 2.4 Water Supply Schemes in City of Mbombela LM and Bushbuckridge Local Municipalities

**Figure 2-7** illustrates all the Water Supply Schemes (WSS) in the City of Mbombela LM and the Bushbuckridge LMs. The various WSSs provide a good indication of where population concentrations exist in both of these two municipal areas.

As can be seen in **Figure 2-7** below, the WSSs in Bushbuckridge LM are concentrated in the south west, which is also where the bulk of the population and related water requirements are concentrated. The following four (4) WSSs are located within the Bushbuckridge LM:

- Acornhoek
- Thulamahashe
- Hoxani
- Marite



**Figure 2-7: WSSs in the demographic focus area**

The following eighteen (18) WSSs are located within the City Mbombela LM:

- Former Mbombela LM:
  - o Elandshoek

- o Hazyview
  - o Matsulu
  - o Mbombela
  - o Mpakeni
  - o Ngodwana
  - o Nsikazi North
  - o Nsikazi South
  - o White River
  - o Esperado
  - o Mandela / Mlambongwane
  - o Sabie River Eco Estate
- Former Umjindi LM:
  - o Barberton
  - o Sheba Siding
  - o Shiyalongubo
  - o Kamadakwa
  - o Fairview Mine
  - o Noord Kaap

## 2.5 Water Supply Schemes in the broader study area

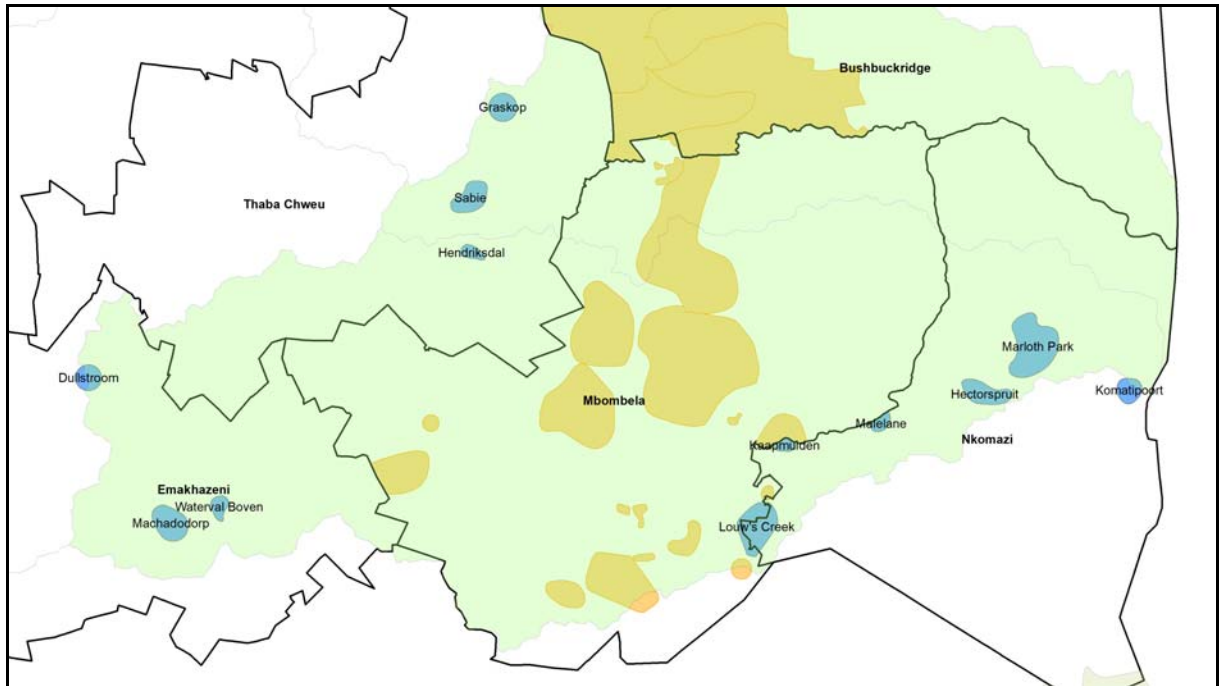
The following WSSs surround the WSS located within the demographic focus areas, and together comprise the broader Study Area:

- Emakhazeni LM:
  - o Dullstroom
  - o Waterval Boven
  - o Machadodorp
- Thaba Chweu LM:
  - o Hendriksdal
  - o Sabie
  - o Graskop
- Nkomazi LM:
  - o Louieville
  - o Komatipoort
  - o Marloth Park



- o Hectorspruit
- o Malelane

As can be seen in **Figure 2-8**, the broader Study Area comprises 3 WSSs in Emakhazeni LM, 4 WSSs in Thaba Chweu LM, and 7 WSSs in Nkomazi LM.



**Figure 2-8: WSSs in the broader Study Area**

### 3 HISTORIC GROWTH PERSPECTIVE AND ANALYSIS

This section of the Report deals with the socio-economic components of the City of Mbombela and Bushbuckridge LMs, and seeks to provide an overview of the economic and social composition of the municipalities, as well as to indicate the historical growth in order to give an indication of the past distribution and growth trends. Furthermore, this section of the Report also seeks to provide an indication of how the base population was determined, to enable to be applied into future growth scenarios for the City of Mbombela and Bushbuckridge LMs. The economic perspective in **Section 3.1** and the demographic perspective in **Section 3.2** that follows jointly paint a holistic picture of the composition, strengths and future possibilities within the City of Mbombela and Bushbuckridge LMs.

#### 3.1 Economic Perspective

This Sub-section of the Report deals with the economic components of the City of Mbombela LM (the former Umjindi and Mbombela LMs) and the Bushbuckridge LM, and seeks to provide an overview of the Gross Domestic Product (GDP) growth, the growth and distribution of employment as well as the sectoral share of the economy.

Interpretation of economic drivers requires a sound understanding of the size of the economy and its dynamics in the past. A number of indicators exist that can describe the economy of a region or an area. The most common variables that are used for the economic analysis include production and Gross Domestic Product per Region (GDP-R). Production represents the total value of sales of goods and services, or the turnover of all economic agents in a region; whilst GDP-R, using the output approach, means the sum of value added created by all residents within a certain period of time, which is usually one year. The trend at which the GDP-R has been changing in the past is also referred to as the economic growth indicator. It is a measure of both the performance of an area and the well-being of the citizens of an area. Faster economic growth than population growth is taken as an indicator of a healthy economy and an improvement in citizens' well-being.

Employment, labour and GDP-R statistics provided in this sub-section of the Report can be divided into three (3) main sectors, namely the Primary, Secondary and Tertiary sectors. Each of these main sectors are further subdivided into various economic sectors as outlined below, to which reference is made throughout the remainder of this sub-section:

- **Primary Sector:**

- o Agriculture/hunting/forestry/fishing – establishments primarily engaged in farming activities or the rendering of agricultural services. Also included are commercial hunting, game farming, forestry, logging and fishing; and
- o Mining/quarrying – the extracting, dressing and beneficiation of minerals occurring naturally.
- **Secondary Sector:**
  - o Manufacturing – the physical or chemical transformation or assembly of materials or compounds into new products;
  - o Electricity/gas/water – production, collection and distribution of electricity, the manufacturing and distribution of gas, the collection, purification and distribution of water; and
  - o Construction – site preparation, demolition, construction of buildings, civil engineering, installation, plumbing, decorating, etc.
- **Tertiary Sector:**
  - o Trade/catering – the wholesale or retail resale of new and used goods in stores, stalls, markets, by mail-order or by other means as well as hotels, restaurants, bars and other tourist activities;
  - o Transport/communication – the provision of passenger and/or freight transport by rail, road, water or air. Includes cargo handling and storage, postal activities, courier activities and the transmission of sound, images, data or other information;
  - o Business and financial services – the activity of obtaining and redistributing funds, financial intermediation, insurance and pension funding. The buying, selling, renting and operating of owned or leased real estate; as well as
  - o Government and community services – activities of central, provincial and local government. Provision of community services, e.g. education, health services, social work, and activities of professional organisations.

Note from the above that there are nine economic sectors. The tourism sector is not a standalone economic sector, but forms a part of some of the other economic sectors, predominantly the trade, transport and financial services sectors.

### 3.1.1 Total GDP and GDP Growth

The total GDP per LM was extracted to indicate the contribution to the national economy. The GDP contribution to the national economy (in R million) from 2006 to 2016 is indicated in **Table 3-1** below.

**Table 3-1: Total GDP from 2006 to 2016 (R millions at constant 2010 prices)**

| Municipality       | GDP (in R millions) at constant 2010 prices |        |        |        |        |        |        |        |        |        |        |
|--------------------|---------------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
|                    | 2006                                        | 2007   | 2008   | 2009   | 2010   | 2011   | 2012   | 2013   | 2014   | 2015   | 2016   |
| Former Mbombela LM | 24 819                                      | 26 135 | 26 914 | 26 862 | 27 435 | 27 917 | 28 417 | 28 988 | 29 684 | 30 053 | 30 137 |
| Former Umjindi LM  | 3 154                                       | 3 182  | 3 082  | 2 996  | 3 001  | 3 021  | 2 980  | 3 077  | 3 158  | 3 144  | 3 167  |
| Bushbuckridge LM   | 6 961                                       | 7 274  | 7 460  | 7 516  | 7 661  | 7 695  | 7 822  | 7 963  | 8 110  | 8 115  | 8 165  |

Source: Quantec research 2017, Regional Socio-economic and Demographic Dataset

The GDP growth per annum in **Table 3-2** below was calculated using the GDP figures per year as indicated in **Table 3-1** above.

**Table 3-2: GDP Growth from 2006 to 2016 (R millions at constant 2010 prices)**

| Municipality       | GDP (in R millions) at constant 2010 prices |        |        |        |        |        |        |        |        |        |             |
|--------------------|---------------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------------|
|                    | 06-'07                                      | 07-'08 | 08-'09 | 09-'10 | 10-'11 | 11-'12 | 12-'13 | 13-'14 | 14-'15 | 15-'16 | Total       |
| Former Mbombela LM | 5,3%                                        | 3,0%   | -0,2%  | 2,1%   | 1,8%   | 1,8%   | 2,0%   | 2,4%   | 1,2%   | 0,3%   | <b>2,0%</b> |
| Former Umjindi LM  | 0,9%                                        | -3,1%  | -2,8%  | 0,2%   | 0,7%   | -1,4%  | 3,2%   | 2,6%   | -0,4%  | 0,7%   | <b>0,0%</b> |
| Bushbuckridge LM   | 4,5%                                        | 2,6%   | 0,7%   | 1,9%   | 0,4%   | 1,6%   | 1,8%   | 1,8%   | 0,1%   | 0,6%   | <b>1,6%</b> |

Source: Quantec research 2017, Regional Socio-economic and Demographic Dataset, Kayamandi calculations

From **Table 3-2** above, it is evident that the former Mbombela LM experienced a positive growth trend over the time period, with a total growth over the time period of 2% per annum. A slight decline in growth of -0.2% is evident during 2008-2009, but the economy recovered with positive growth thereafter. The economy of the former Umjindi LM experienced a significant decline of -3.1% during the 2007-2008 time period, which continued through to 2008-2009. Overall between 2006 and 2016 the economy of the former Umjindi LM experienced no growth and remained at 0% per annum. The Bushbuckridge LM experienced a positive growth trend over the ten year time period from 2006 to 2016, with a 1.6% growth per annum over the period.

### 3.1.2 Sectoral GDP and GDP Growth

An indication of the GDP of the LMs and their economic sectors for the years 2006 and 2016 is provided in **Table 3-3** below.

**Table 3-3: GDP per Sector (R millions at constant 2010 prices)**

| Sector              | Year              |                  |               |                   |                  |               |
|---------------------|-------------------|------------------|---------------|-------------------|------------------|---------------|
|                     | 2006              |                  |               | 2016              |                  |               |
|                     | Mbombela (former) | Umjindi (former) | Bushbuckridge | Mbombela (former) | Umjindi (former) | Bushbuckridge |
| Agriculture         | 694               | 284              | 183           | 927               | 349              | 235           |
| Mining              | 508               | 768              | 155           | 641               | 406              | 97            |
| Manufacturing       | 3 906             | 381              | 380           | 3 624             | 349              | 363           |
| Utilities           | 730               | 29               | 288           | 795               | 26               | 364           |
| Construction        | 823               | 63               | 208           | 1 150             | 92               | 264           |
| Retail Trade        | 5 486             | 480              | 1 445         | 6 657             | 527              | 1 647         |
| Transport           | 1 981             | 120              | 567           | 2 647             | 153              | 619           |
| Business Services   | 5 352             | 353              | 814           | 6 652             | 401              | 959           |
| Social Services     | 3 988             | 533              | 2 210         | 5 548             | 706              | 2 868         |
| Government Services | 1 353             | 144              | 711           | 1 496             | 156              | 749           |
| <b>Total</b>        | <b>24 819</b>     | <b>3 154</b>     | <b>6 961</b>  | <b>30 137</b>     | <b>3 167</b>     | <b>8 165</b>  |

Source: Quantec research 2017, Regional Socio-economic and Demographic Dataset

As can be seen in **Table 3-4** below, between 2006 and 2016 the sectors in the Mbombela LM showed positive average growth rate per annum, except for the manufacturing sector with a decline of -0.7%. The mining, utilities and manufacturing sectors declined the most with -6.2%, -1.1% and -0.8% respectively in the Umjindi LM. The mining sector (-4.6%) experienced the most and significant decline in Bushbuckridge LM followed by the -0.4% decline in the manufacturing sector.

**Table 3-4: GDP Growth per Sector (R millions at constant 2010 prices)**

| Sector        | Growth per Sector (2006-2016) |                  |               |
|---------------|-------------------------------|------------------|---------------|
|               | Mbombela (former)             | Umjindi (former) | Bushbuckridge |
| Agriculture   | 2,9%                          | 2,1%             | 2,5%          |
| Mining        | 2,4%                          | -6,2%            | -4,6%         |
| Manufacturing | -0,7%                         | -0,8%            | -0,4%         |
| Utilities     | 0,9%                          | -1,1%            | 2,4%          |
| Construction  | 3,4%                          | 3,9%             | 2,4%          |
| Retail Trade  | 2,0%                          | 0,9%             | 1,3%          |

| Sector              | Growth per Sector (2006-2016) |                  |               |
|---------------------|-------------------------------|------------------|---------------|
|                     | Mbombela (former)             | Umjindi (former) | Bushbuckridge |
| Transport           | 2,9%                          | 2,5%             | 0,9%          |
| Business Services   | 2,2%                          | 1,3%             | 1,7%          |
| Social Services     | 3,4%                          | 2,9%             | 2,6%          |
| Government Services | 1,0%                          | 0,8%             | 0,5%          |
| <b>Total</b>        | <b>2,0%</b>                   | <b>0,04%</b>     | <b>1,6%</b>   |

Source: Quantec research 2017, Regional Socio-economic and Demographic Dataset, Kayamandi calculations

The overall economy between 2006 and 2016 in all three of the LMs experienced positive growth. The former Mbombela LM experienced the highest growth of 2% per annum over the aforementioned period.

The contribution per sector to GDP indicates which economic sector carries the largest weight and makes the largest contribution to the local economy. The contributions per sector to the GDP are given **Table 3-5** below.

In 2016 the highest contributing sector to the total GDP in the former Mbombela LM was the retail and the business services sector both contributing 22% of the total GDP. The dominating sector in the former Umjindi LM was the Social Services Sector contributing 22% to the economy, followed by the Retail Trade Sector contributing 17%. The highest contributing sectors in Bushbuckridge LM in 2016, was the Social Services Sector (35%) and the Retail Trade Sector (20%).

**Table 3-5: Municipal Economic Sector Contribution to the Total GDP**

| Sector              | 2006              |                  |               | 2016              |                  |               |
|---------------------|-------------------|------------------|---------------|-------------------|------------------|---------------|
|                     | Mbombela (former) | Umjindi (former) | Bushbuckridge | Mbombela (former) | Umjindi (former) | Bushbuckridge |
| Agriculture         | 3%                | 9%               | 3%            | 3%                | 11%              | 3%            |
| Mining              | 2%                | 24%              | 2%            | 2%                | 13%              | 1%            |
| Manufacturing       | 16%               | 12%              | 5%            | 12%               | 11%              | 4%            |
| Utilities           | 3%                | 1%               | 4%            | 3%                | 1%               | 4%            |
| Construction        | 3%                | 2%               | 3%            | 4%                | 3%               | 3%            |
| Retail trade        | 22%               | 15%              | 21%           | 22%               | 17%              | 20%           |
| Transport           | 8%                | 4%               | 8%            | 9%                | 5%               | 8%            |
| Business services   | 22%               | 11%              | 12%           | 22%               | 13%              | 12%           |
| Social services     | 16%               | 17%              | 32%           | 18%               | 22%              | 35%           |
| Government services | 5%                | 5%               | 10%           | 5%                | 5%               | 9%            |
| <b>Total</b>        | <b>100%</b>       | <b>100%</b>      | <b>100%</b>   | <b>100%</b>       | <b>100%</b>      | <b>100%</b>   |

Source: Quantec research 2017, Regional Socio-economic and Demographic Dataset, Kayamandi calculations

### 3.1.3 Employment per Sector

The employment per sector and growth thereof are given in **Table 3-6** below.

**Table 3-6: Employment per Sector**

| Sector              | 2006              |                  |                | 2016              |                  |                |
|---------------------|-------------------|------------------|----------------|-------------------|------------------|----------------|
|                     | Mbombela (former) | Umjindi (former) | Bushbuck-ridge | Mbombela (former) | Umjindi (former) | Bushbuck-ridge |
| Agriculture         | 25 170            | 9 843            | 5 827          | 17 673            | 6 906            | 4 322          |
| Mining              | 601               | 1 284            | 186            | 753               | 1 137            | 191            |
| Manufacturing       | 18 304            | 2 899            | 3 326          | 15 583            | 2 175            | 2 562          |
| Utilities           | 731               | 29               | 393            | 925               | 37               | 459            |
| Construction        | 16 205            | 1 394            | 5 601          | 20 712            | 1 950            | 7 303          |
| Retail Trade        | 39 720            | 3 953            | 13 792         | 51 779            | 4 722            | 17 981         |
| Transport           | 6 326             | 396              | 2 436          | 10 014            | 612              | 3 579          |
| Business Services   | 20 605            | 1 952            | 4 932          | 26 398            | 2 196            | 6 094          |
| Social Services     | 17 388            | 2 543            | 11 526         | 24 475            | 3 403            | 15 167         |
| Government Services | 20 554            | 2 435            | 9 422          | 32 481            | 3 402            | 15 795         |
| <b>Total</b>        | <b>165 604</b>    | <b>26 728</b>    | <b>57 441</b>  | <b>200 793</b>    | <b>26 540</b>    | <b>73 453</b>  |

Source: Quantec research 2017, Regional Socio-economic and Demographic Dataset

The annual growth rates per sector between 2006 and 2016 are given in **Table 3-7** below.

**Table 3-7: Employment Growth per annum per Sector, 2006-2016**

| Sector              | Growth per Sector (2006-2016) |                  |               |
|---------------------|-------------------------------|------------------|---------------|
|                     | Mbombela (former)             | Umjindi (former) | Bushbuckridge |
| Agriculture         | -3,5%                         | -3,5%            | -2,9%         |
| Mining              | 2,3%                          | -1,2%            | 0,3%          |
| Manufacturing       | -1,6%                         | -2,8%            | -2,6%         |
| Utilities           | 2,4%                          | 2,5%             | 1,6%          |
| Construction        | 2,5%                          | 3,4%             | 2,7%          |
| Retail Trade        | 2,7%                          | 1,8%             | 2,7%          |
| Transport           | 4,7%                          | 4,4%             | 3,9%          |
| Business Services   | 2,5%                          | 1,2%             | 2,1%          |
| Social Services     | 3,5%                          | 3,0%             | 2,8%          |
| Government Services | 4,7%                          | 3,4%             | 5,3%          |
| <b>Total</b>        | <b>1,9%</b>                   | <b>-0,07%</b>    | <b>2,5%</b>   |

Source: Quantec research 2017, Regional Socio-economic and Demographic Dataset, Kayamandi calculations

Apart from the former Umjindi LM, the average employment growth rate between 2006 and 2016 increased by 1.9% and 2.5% per annum in the former Mbombela and Bushbuckridge



LMs respectively. The Government Services Sector experienced the highest growth rate in all three municipalities. Despite the fact that Mpumalanga was ranked fourth in terms of manufacturing, after Gauteng, Western Cape and KwaZulu Natal, and accounted for 7-10% of South Africa's total manufacturing, the manufacturing sector in all the municipalities, shown above, experienced negative growth rates.

### 3.2 Demographic Perspective

In order to understand demographics, reference must be made to demographic factors, which impact on the City of Mbombela and Bushbuckridge LMs from a historical perspective. This will assist with providing a picture of trends and impacts that would inform future population growth. For the purposes of this discussion, data from StatsSA have been used. It should be noted that the Census data used in this sub-section of the Report is data from the Census that was conducted prior to the amalgamation of Mbombela LM and Umjindi LM (now City of Mbombela LM), and these two former LMs were analysed separately.

#### 3.2.1 Population Size and Growth

Understanding the demographics of any geographical area helps to analyse different developmental trends. Population figures and population growth rates assist in determining the demand for production output and the potential growth thereof.

The population numbers for the 2001 and 2011 Census data and the 2016 Community Survey data from StatsSA, as well as the average growth per annum are presented in **Table 3-8** below.

**Table 3-8: Population Growth and Size from 2001 to 2016**

| Municipality         | Population Size |         |         | Average Growth per Annum |
|----------------------|-----------------|---------|---------|--------------------------|
|                      | 2001            | 2011    | 2016    | 2011-2016                |
| Mbombela LM (former) | 477 460         | 588 794 | 622 158 | 1,1%                     |
| Umjindi LM (former)  | 53 913          | 67 156  | 71 211  | 1,2%                     |
| Bushbuckridge LM     | 499 670         | 541 248 | 548 760 | 0,3%                     |

Source: StatsSA Census 2001, Census 2011, Community survey 2016, and Kayamandi calculations

As can be seen in **Table 3-8** above the overall population in all three LMs grew steadily, albeit at slow rates, from 2011 to 2016.

### 3.2.2 Number of households

The household numbers for the 2001 and 2011 Census data and the 2016 Community Survey data from StatsSA, as well as the average growth per annum are presented in **Table 3-9** below.

**Table 3-9: Number of Households per Municipality from 2001 to 2016**

| Municipality         | Number of households |         |         | Average Growth per Annum |
|----------------------|----------------------|---------|---------|--------------------------|
|                      | 2001                 | 2011    | 2016    | 2011-2016                |
| Mbombela LM (former) | 122 873              | 161 773 | 181 794 | 2,4%                     |
| Umjindi LM (former)  | 15 961               | 19 561  | 23 702  | 3,9%                     |
| Bushbuckridge LM     | 110 560              | 134 200 | 137 419 | 0,5%                     |

Source: StatsSA Census 2001, Census 2011, Community survey 2016, and Kayamandi calculations

From **Table 3-9** above, it is evident that the total number of households has seen a significance growth compared to the population growth. The former Umjindi LM experienced the highest growth of 3.9% per annum during 2011 to 2016. Contributing factors to the positive growth in households might be as a result of the fertility and mortality rates, as well as mass migration influx from neighbouring countries such as Mozambique and Swaziland.

### 3.2.3 Household Size

The household size for the 2001 and 2011 Census data and the 2016 Community Survey data from StatsSA, are presented in **Table 3-10** below.

**Table 3-10: Average Household Size per Municipality from 2001 to 2016**

| Municipality         | Average Household Size |      |      |
|----------------------|------------------------|------|------|
|                      | 2001                   | 2011 | 2016 |
| Mbombela LM (former) | 3.9                    | 3.6  | 3.4  |
| Umjindi LM (former)  | 3.4                    | 3.4  | 3.0  |
| Bushbuckridge LM     | 4.5                    | 4.0  | 4.0  |

Source: StatsSA Census 2001, Census 2011, Community survey 2016, and Kayamandi calculations

From the **Table 3-10** above it is evident that household sizes in the municipalities have reduced slightly.

### 3.2.4 Household Income

The average annual household income for the 2001 and 2011 Census data from StatsSA, are presented in **Table 3-11** below. The data reflects income differences between 2001 and 2011.

**Table 3-11: Average Household Incomes in 2001 and 2011**

| Annual Income      | Income Category | 2001              |                  |                | 2011              |                  |                |
|--------------------|-----------------|-------------------|------------------|----------------|-------------------|------------------|----------------|
|                    |                 | Mbombela (former) | Umjindi (former) | Bushbuck-ridge | Mbombela (former) | Umjindi (former) | Bushbuck-ridge |
| No income          | Low             | 15%               | 11%              | 39%            | 13%               | 11%              | 17%            |
| R1 – R4 800        |                 | 14%               | 13%              | 12%            | 5%                | 4%               | 9%             |
| R4 801 – R9 600    |                 | 23%               | 24%              | 21%            | 8%                | 6%               | 15%            |
| R9 601 – R19 200   |                 | 20%               | 20%              | 13%            | 18%               | 21%              | 22%            |
| R19 201 – R38 400  |                 | 13%               | 14%              | 8%             | 21%               | 22%              | 19%            |
| R38 401 – R76 800  | Middle          | 7%                | 8%               | 4%             | 13%               | 15%              | 8%             |
| R76 801 – R153 600 |                 | 5%                | 5%               | 2%             | 9%                | 9%               | 5%             |
| R153 601 and more  | High            | 4%                | 4%               | 1%             | 13%               | 12%              | 4%             |
| Total              |                 | 100%              | 100%             | 100%           | 100%              | 100%             | 100%           |

Source: StatsSA Census 2001, Census 2011, and Kayamandi calculations

From **Table 3-11** above it is deduced that a clear shift exists in the average annual income of households between 2001 and 2011. A decrease in the number of households that earn less than R9 600 per annum is noted whilst households that fall within the latter income groups earn more.

### 3.3 Base Population Determination

A 2016 base population figure is needed as the starting point for the demographic modelling to determine future population projections. Various municipal documents and previous studies were consulted for demographic information as summarised in **Table 3-12** below.

Due to the discrepancies as highlighted in **Table 3-12** below between the different sources, and further difficulty to compare data at lower than LM levels, new calculations had to be made to determine the 2016 base population and the distribution thereof.

**Table 3-12: Base Population Comparison from Various Data Sources**

| Data Source                                                                                              | Mbombela LM (former) | Umjindi LM (former) | Bushbuckridge LM |
|----------------------------------------------------------------------------------------------------------|----------------------|---------------------|------------------|
| StatsSA Census 2011 (2011)                                                                               | 588 794              | 67 156              | 541 248          |
| Water Requirements and Availability Reconciliation Strategy for the Mbombela Municipal Area (DWS, 2014). | 619 555              | -                   | 613 643          |
| City of Mbombela Vision 2030 (2015)                                                                      | 650 912              | 78 552              | -                |
| DWS Water Services Development Plan (WSDP) Data (2016)                                                   | 669 000              | 80 113              | 788 251          |
| StatsSA Community Survey 2016 (2016)                                                                     | 622 157              | 71 211              | 548 760          |

The latest official StatsSA data from the 2016 Community Survey was used in order to determine a realistic 2016 base population at municipal level. However, since the StatsSA 2016 Community Survey data is only released at municipal level, the distribution of the 2016 municipal population had to be determined. The population distributions from the StatsSA 2011 Census data was applied to the 2016 total LM population to determine the distribution of the 2016 population. The newly calculated 2016 distribution of population was then grouped according to the WSSs within each municipality and balanced off against the total population figures from the StatsSA 2016 Community Survey results. Population growth was also accounted for by comparing the change in SBC in the WSSs during 2011 and 2016. Change in average household size was also applied to obtain realistic population figures.

The most realistic base population for 2016, for the purpose of this Study, directly compares with the urban areas in the StatsSA 2016 Community Survey data. Note, however, whilst the realistic 2016 base figure is directly comparable with the official StatsSA data from the 2016 Community Survey, discussions with relevant municipal stakeholders revealed that the population size is potentially slightly higher, which informed the need for the application of slightly higher scenario to the base population figures.

The resultant base population and base household figures per municipality for the realistic and high growth scenarios are presented in **Table 3-13** and **Table 3-14** below.

**Table 3-13: Base Population Determination per Municipality**

| Municipality                     | Realistic Growth Scenario |         |         | High Growth Scenario |         |         |
|----------------------------------|---------------------------|---------|---------|----------------------|---------|---------|
|                                  | 2011                      | 2016    | 2018    | 2011                 | 2016    | 2018    |
| Mbombela LM (former) excl. rural | 585 037                   | 618 810 | 633 186 | 585 037              | 637 256 | 660 036 |
| Umjindi LM (former) excl. rural  | 66 074                    | 70 433  | 72 014  | 66 074               | 74 448  | 77 383  |
| Bushbuckridge LM excl. rural     | 532 846                   | 540 306 | 543 284 | 532 846              | 552 974 | 561 244 |

**Table 3-14: Base Household Determination per Municipality**

| Municipality                     | Realist Growth Scenario |         |         | High Growth Scenario |         |         |
|----------------------------------|-------------------------|---------|---------|----------------------|---------|---------|
|                                  | 2011                    | 2016    | 2018    | 2011                 | 2016    | 2018    |
| Mbombela LM (former) excl. rural | 160 170                 | 180 516 | 186 512 | 160 170              | 186 145 | 194 843 |
| Umjindi LM (former) excl. rural  | 19 048                  | 23 318  | 23 969  | 19 048               | 24 655  | 25 776  |
| Bushbuckridge LM excl. rural     | 132 399                 | 135 587 | 137 710 | 132 399              | 138 763 | 142 257 |

The resultant distribution per WSS for the 2018 population and household figures per scenario is given in **Table 3-15** below.

**Table 3-15: Population and Household Distribution per WSS in 2018**

| Water Services Area                     | 2018 POPULATION    |                | 2018 HOUSEHOLDS    |                |
|-----------------------------------------|--------------------|----------------|--------------------|----------------|
|                                         | REALISTIC SCENARIO | HIGH SCENARIO  | REALISTIC SCENARIO | HIGH SCENARIO  |
| Elandshoek                              | 1 494              | 2 330          | 531                | 827            |
| Hazyview                                | 4 657              | 4 663          | 1 413              | 1 415          |
| Matsulu                                 | 56 524             | 56 726         | 15 793             | 15 850         |
| Mbombela                                | 78 475             | 79 057         | 22 646             | 22 814         |
| Mpakeni                                 | 1 460              | 1 642          | 404                | 454            |
| Ngodwana                                | 3 957              | 4 661          | 2 146              | 2 527          |
| Nsikazi North                           | 173 131            | 181 793        | 52 588             | 55 218         |
| Nsikazi South                           | 279 108            | 288 705        | 79 898             | 82 646         |
| White River                             | 32 969             | 38 495         | 10 740             | 12 541         |
| Esperado                                | 560                | 934            | 219                | 364            |
| Mandela / Mlambongwane                  | 251                | 430            | 74                 | 127            |
| Sabie River Eco Estate                  | 600                | 600            | 60                 | 60             |
| <b>Mbombela LM (former) excl. rural</b> | <b>633 186</b>     | <b>660 036</b> | <b>186 512</b>     | <b>194 843</b> |
| Barberton                               | 61 566             | 62 110         | 20 433             | 20 613         |
| Sheba Siding                            | 1 963              | 2 212          | 658                | 741            |
| Shiyalongubo                            | 419                | 433            | 124                | 128            |
| Kamadakwa                               | 6 170              | 10 110         | 2 003              | 3 282          |
| Fairview Mine                           | 599                | 607            | 206                | 209            |
| Noord Kaap                              | 1 297              | 1 911          | 545                | 803            |
| <b>Umjindi LM (old) excl. rural</b>     | <b>72 014</b>      | <b>77 383</b>  | <b>23 969</b>      | <b>25 776</b>  |
| Acornhoek                               | 214 389            | 221 898        | 55 894             | 57 851         |
| Thulamahashe                            | 142 566            | 144 939        | 35 860             | 36 457         |
| Hoxani                                  | 149 990            | 156 757        | 36 899             | 38 564         |
| Marite                                  | 36 339             | 37 650         | 9 057              | 9 385          |
| <b>Bushbuckridge LM excl. rural</b>     | <b>543 284</b>     | <b>561 244</b> | <b>137 710</b>     | <b>142 257</b> |

The percentage distribution of the residential households Level of Service (LoS) are given in **Table 3-16** below.

**Table 3-16: Percentage Distribution of Household Level of Services per WSS in 2018**

| Water Supply Scheme              | Formal |          |                    |            |               |             |                  | Informal     |                 |           |                 | TOTAL |                |
|----------------------------------|--------|----------|--------------------|------------|---------------|-------------|------------------|--------------|-----------------|-----------|-----------------|-------|----------------|
|                                  | Flats  | Clusters | Single Residential |            |               |             |                  | Total Formal | Below RDP Level | RDP level | Above RDP Level |       | Total Informal |
|                                  |        |          | Below RDP Level    | Low Income | Medium Income | High Income | Very High Income |              |                 |           |                 |       |                |
| Elandshoek                       | 3      | 1        | 0                  | 33         | 7             | 1           | 0                | 45           | 17              | 27        | 11              | 55    | 100            |
| Hazyview                         | 2      | 2        | 0                  | 20         | 20            | 37          | 2                | 83           | 10              | 5         | 2               | 17    | 100            |
| Matsulu                          | 1      | 0        | 13                 | 47         | 22            | 5           | 0                | 88           | 7               | 2         | 3               | 12    | 100            |
| Mbombela                         | 12     | 11       | 0                  | 11         | 14            | 37          | 2                | 87           | 8               | 3         | 2               | 13    | 100            |
| Mpakeni                          | 0      | 0        | 31                 | 43         | 23            | 1           | 0                | 98           | 1               | 1         | 0               | 2     | 100            |
| Ngodwana                         | 1      | 4        | 0                  | 26         | 7             | 15          | 1                | 54           | 1               | 43        | 2               | 46    | 100            |
| Nsikazi North                    | 2      | 0        | 28                 | 44         | 15            | 4           | 0                | 93           | 4               | 1         | 2               | 7     | 100            |
| Nsikazi South                    | 2      | 0        | 22                 | 42         | 21            | 7           | 0                | 94           | 4               | 1         | 1               | 6     | 100            |
| White River                      | 7      | 5        | 0                  | 21         | 14            | 28          | 2                | 77           | 13              | 5         | 5               | 23    | 100            |
| Esperado                         | 0      | 0        | 18                 | 49         | 33            | 0           | 0                | 100          | 0               | 0         | 0               | 0     | 100            |
| Mandela/ Mlambongwane            | 0      | 0        | 17                 | 49         | 34            | 0           | 0                | 100          | 0               | 0         | 0               | 0     | 100            |
| Sabie River Eco Estate           | 0      | 0        | 0                  | 0          | 0             | 0           | 100              | 100          | 0               | 0         | 0               | 0     | 100            |
| Mbombela LM (former) excl. rural | 3      | 2        | 19                 | 38         | 18            | 11          | 0                | 91           | 5               | 2         | 2               | 9     | 100            |
| Barberton                        | 2      | 1        | 4                  | 47         | 22            | 12          | 1                | 89           | 3               | 5         | 3               | 11    | 100            |
| Sheba Siding                     | 0      | 1        | 14                 | 8          | 9             | 4           | 0                | 36           | 39              | 24        | 1               | 64    | 100            |
| Shiyalongubo                     | 0      | 0        | 0                  | 15         | 14            | 1           | 0                | 30           | 65              | 5         | 0               | 70    | 100            |
| Kamadakwa                        | 0      | 0        | 18                 | 7          | 20            | 4           | 0                | 49           | 23              | 22        | 6               | 51    | 100            |
| Fairview Mine                    | 6      | 1        | 0                  | 7          | 39            | 44          | 2                | 99           | 0               | 0         | 1               | 1     | 100            |
| Noord Kaap                       | 3      | 0        | 0                  | 14         | 43            | 11          | 1                | 72           | 19              | 8         | 1               | 28    | 100            |
| Umjindi LM (former) excl. rural  | 2      | 1        | 5                  | 41         | 22            | 11          | 1                | 84           | 6               | 7         | 3               | 16    | 100            |
| Acornhoek                        | 0      | 0        | 30                 | 34         | 24            | 8           | 0                | 96           | 2               | 1         | 1               | 4     | 100            |
| Thulamahashe                     | 0      | 0        | 25                 | 56         | 11            | 5           | 0                | 97           | 1               | 1         | 1               | 3     | 100            |
| Hoxani                           | 1      | 0        | 28                 | 50         | 11            | 4           | 0                | 94           | 3               | 1         | 2               | 6     | 100            |
| Marite                           | 0      | 0        | 35                 | 30         | 24            | 5           | 0                | 94           | 3               | 2         | 1               | 6     | 100            |
| Bushbuckridge LM excl. rural     | 0      | 0        | 28                 | 44         | 17            | 6           | 0                | 96           | 2               | 1         | 1               | 4     | 100            |
| TOTAL                            | 2      | 1        | 22                 | 40         | 18            | 9           | 0                | 92           | 4               | 2         | 2               | 8     | 100            |

## 4 GROWTH SCENARIOS AND PROJECTED POPULATION

This section of the Report deals with the development of growth scenarios until 2040. These scenarios are based on detailed discussions with local stakeholders, municipal documents and historic data relating to structural economic changes, policy changes, income groups, strategic development projects, social dynamics, proposed housing developments, infrastructure developments, urbanisation and migration trends, as well as historical growth patterns. Modelling was done for each one of the WSS, which are characterised by their unique attributes and circumstances. Based on information obtained from the LMs, each WSSs have a specific growth forecast, which determines the pace and rate of development and related population growth. The modelling process focused on the growth of population (or individuals), and on the growth of households per WSS for realistic and high growth scenarios.

### 4.1 Growth Scenarios

It was necessary to develop two (2) growth scenarios for development, namely a realistic growth and a higher growth scenario, as it is impossible for all the smaller settlements in the City of Mbombela and Bushbuckridge LMs to grow at the same rate as larger nodes such as Hazyview, White River, Nelspruit and Acornhoek.

Note that previously, low and high population scenarios have always been required. However, it is believed that providing a low and high is pointless, since the low population estimates are always pushed down to the lowest limits, but never get used for planning purposes as planning never gets done for the lowest expected population. The difference between the low and high envelope has also always been too large, and creates uncertainty of what size population to plan for within the envelope. As such, realistic and high growth scenarios are used instead. The realistic scenarios provide an indication of the most likely population figure that could emerge. Whereas the high growth scenario provides the higher upper limit, for which planning is required.

Furthermore, each WSS have various varying factors, which affect each WSS according to their individual characteristics. The following demographic development determinants were taken into account:

- Migration;
- Mortality;
- Fertility; and

- HIV/AIDS.

There are indications that the large amounts of immigrants in the City of Mbombela and Bushbuckridge LMs place enormous pressure on already over-extended, and under-supplied social services (e.g. schools, clinics), as well as on the existing infrastructure and services (e.g. water, sanitation, electricity, etc.). Population growth projections therefore need to consider in-migration, and in order to estimate what this could mean for future population distribution and resource requirements (e.g. for water, sanitation, etc.).

The City of Mbombela and Bushbuckridge LMs municipalities have rapid population growth, which is as a result of migration into the area in search of better job opportunities. The majority of these migrants are from the neighbouring countries (Swaziland and Mozambique). Future population projections should also account for internal migration, which will ultimately influence population figures in the various areas within the LMs due to inherent internal migration dynamics of the local population. Very limited information is, however, available pertaining to migration patterns at local level (municipal level). It is, however, also a fact that a lack of sufficient job opportunities to accommodate economically active population, together with past apartheid policies of influx control, has entrenched a migratory labour pattern in the area as is the case in the rest of South Africa.

According to StatsSA, the South African infant mortality rate for 2017 is estimated at 32,8 per 1 000 live births. The estimated overall HIV prevalence rate is approximately 12,6% among the South African population. Furthermore, the total number of people living with HIV in South Africa was estimated to be approximately 7,06 million in 2017. An estimated 18,0% of people aged between 15 to 49 in South Africa are HIV positive.

This health pattern is also very evident from Census information, which indicates a discrepancy in the gender structure. Male absenteeism is higher in many rural areas, but some females also form part of the migrant labour pattern, although substantially less than males. Life expectancy of South Africans at birth for 2017 is estimated at 61,2 years for males and 66,7 years for females.

The above demographic trends influencing population growth have been taken into account for both the growth scenarios designed for the City of Mbombela and Bushbuckridge LMs.



## 4.2 Projected Population Forecasts for the City of Mbombela and Bushbuckridge Local Municipalities

Population growth depicts the estimated growth of each of the WSS within the City of Mbombela and Bushbuckridge LM, also taking into account in- and out-migration to and from, as well as internal migration.

An analysis of historic growth patterns is required, prior to undertaking future population estimates and/or projections. Mid-year population estimates by StatsSA are one of the information sources that was used to inform future growth scenarios. The estimates on a national and provincial level, reveal overall decline in population growth tendencies.

### 4.2.1 Population Estimates for City of Mbombela and Bushbuckridge LMs

The projected population figures and the projected population growth per scenario for the City of Mbombela and Bushbuckridge LMs are given in **Table 4-1** and **Table 4-2** below.

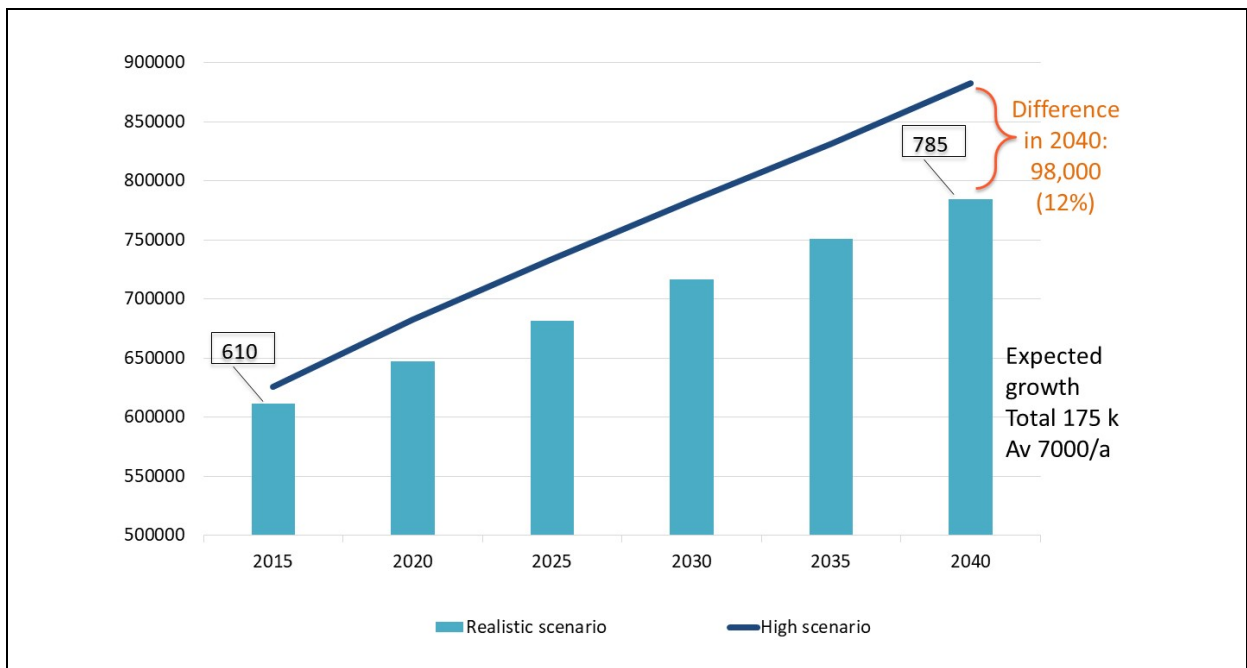
**Table 4-1: Five year Interval Population Estimates per Local Municipality from 2010 to 2040**

| Municipality                     | Growth Scenario | Population Figures |         |         |         |         |         |         |
|----------------------------------|-----------------|--------------------|---------|---------|---------|---------|---------|---------|
|                                  |                 | 2010               | 2015    | 2020    | 2025    | 2030    | 2035    | 2040    |
| Mbombela LM (former) excl. rural | Realistic       | 570 446            | 611 228 | 647 312 | 681 604 | 716 484 | 750 755 | 784 628 |
|                                  | High            | 570 446            | 625 675 | 682 826 | 733 699 | 783 528 | 831 715 | 882 311 |
| Umjindi LM (former) excl. rural  | Realistic       | 62 778             | 69 517  | 73 565  | 77 617  | 81 866  | 86 304  | 90 922  |
|                                  | High            | 62 778             | 72 397  | 79 961  | 85 420  | 91 072  | 96 842  | 102 925 |
| Bushbuckridge LM excl. rural     | Realistic       | 528 388            | 538 801 | 546 244 | 553 638 | 561 102 | 568 632 | 576 233 |
|                                  | High            | 528 388            | 548 854 | 569 644 | 590 126 | 610 294 | 630 120 | 649 579 |

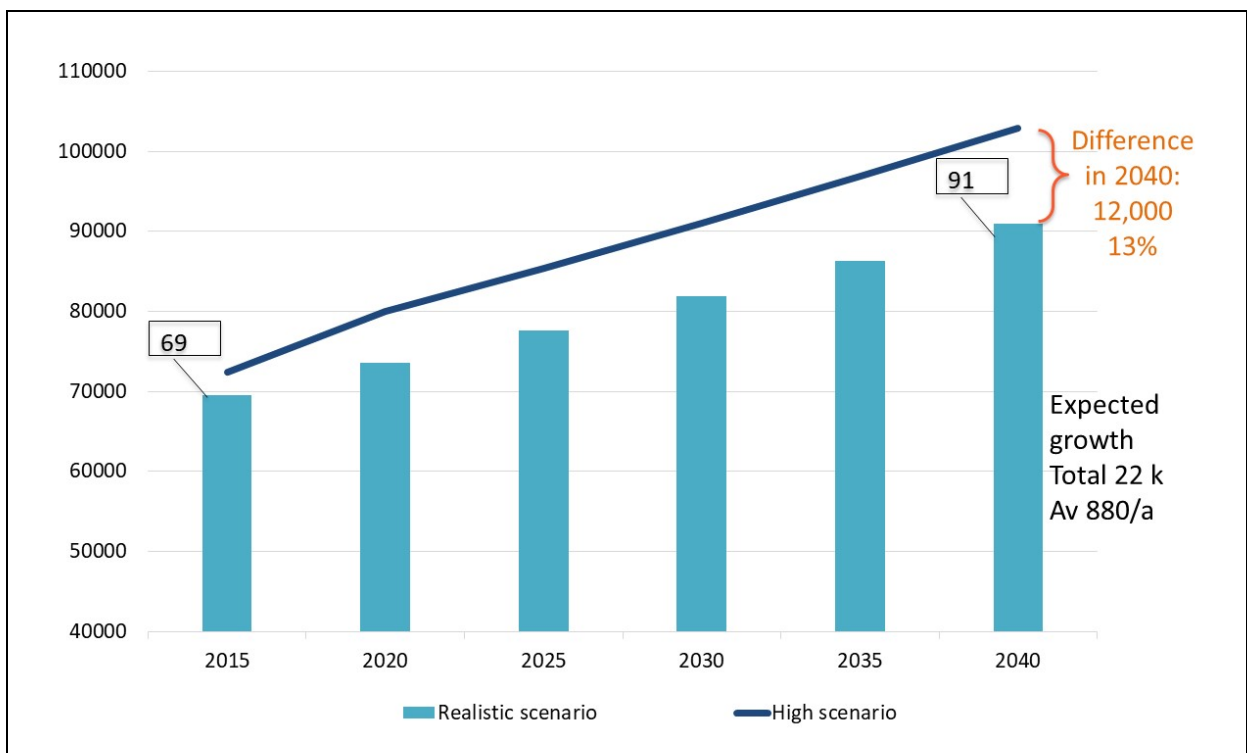
**Table 4-2: Five year Interval Population Growth Estimates per Local Municipality from 2010 to 2040**

| Municipality                     | Growth Scenario | Population Growth Figures |           |           |           |           |           |
|----------------------------------|-----------------|---------------------------|-----------|-----------|-----------|-----------|-----------|
|                                  |                 | 2010-2015                 | 2015-2020 | 2020-2025 | 2025-2030 | 2030-2035 | 2035-2040 |
| Mbombela LM (former) excl. rural | Realistic       | 1.4%                      | 1.2%      | 1.0%      | 1.0%      | 0.9%      | 0.9%      |
|                                  | High            | 1.8%                      | 1.8%      | 1.4%      | 1.3%      | 1.2%      | 1.2%      |
| Umjindi LM (former) excl. rural  | Realistic       | 2.1%                      | 1.1%      | 1.1%      | 1.1%      | 1.1%      | 1.0%      |
|                                  | High            | 2.9%                      | 2.0%      | 1.3%      | 1.3%      | 1.2%      | 1.2%      |
| Bushbuckridge LM excl. rural     | Realistic       | 0.4%                      | 0.3%      | 0.3%      | 0.3%      | 0.3%      | 0.3%      |
|                                  | High            | 0.8%                      | 0.7%      | 0.7%      | 0.7%      | 0.6%      | 0.6%      |

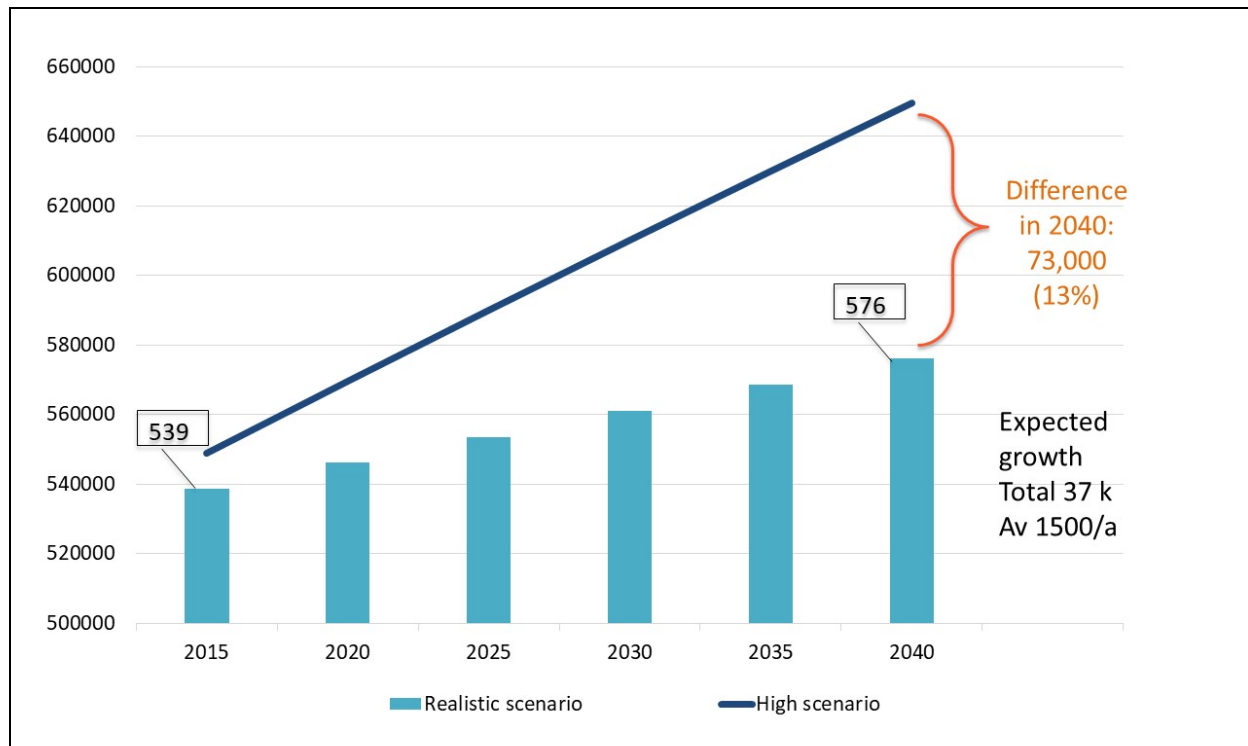
**Figure 4-1, Figure 4-2, and Figure 4-3** below reveal the projected population for former Mbombela LM, former Umjindi LM, and Bushbuckridge LMs respectively.



**Figure 4-1: Projected Population per 5 year interval for former Mbombela Local Municipality**

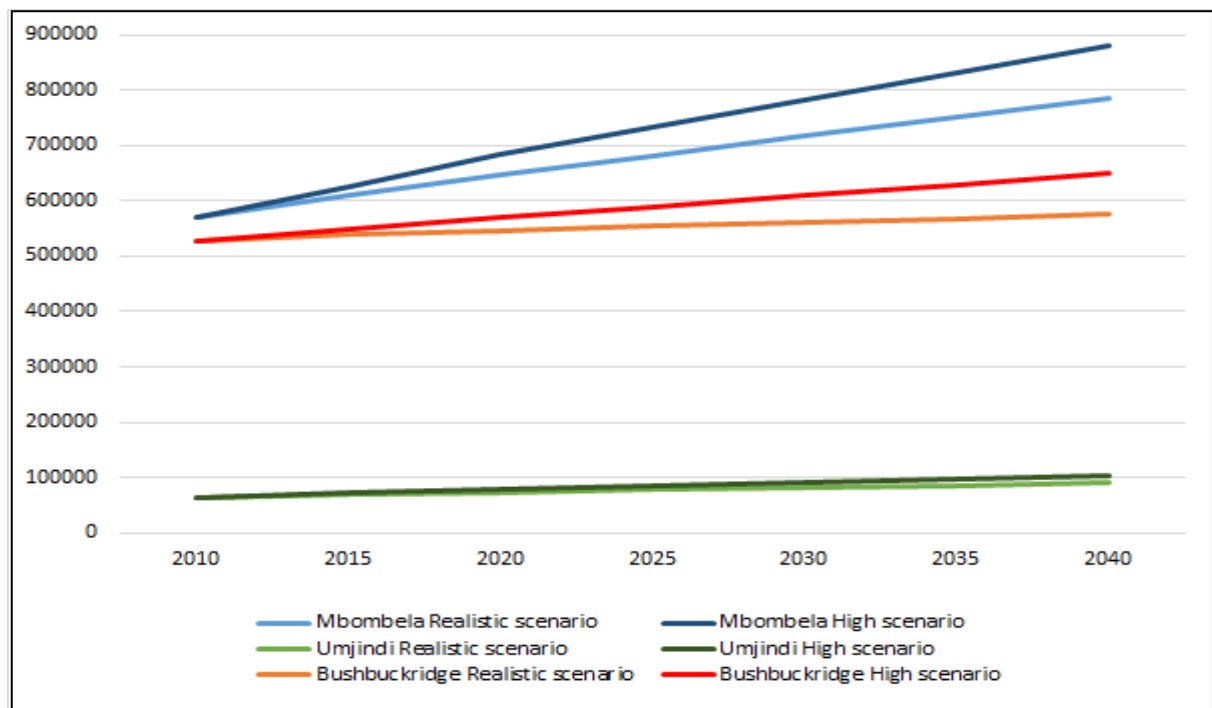


**Figure 4-2: Projected Population per 5 year interval for former Umjindi Local Municipality**



**Figure 4-3: Projected Population per 5 year interval for Bushbuckridge Local Municipality**

The projected population per LM over the 30 year period from 2010 to 2040 is shown in **Figure 4-4** below.



**Figure 4-4: Projected Population Growth per Scenario from 2010 to 2040**

The projected population, and population, growth per LM from 2010 until 2040, which based on the modelling undertaken, and compared to the projected population from the previous the Mbombela Reconciliation Strategy (2014), and other sources are given in **Table 4-3** and **Table 4-4** below.

**Table 4-3: Estimated 5 year interval Population Figures per Local Municipality as per the Various Sources**

| Municipality         | Source                                                                           | Population Figures |         |         |         |         |         |         |
|----------------------|----------------------------------------------------------------------------------|--------------------|---------|---------|---------|---------|---------|---------|
|                      |                                                                                  | 2010               | 2015    | 2020    | 2025    | 2030    | 2035    | 2040    |
| Mbombela LM (former) | Current estimates realistic scenario                                             | 570 446            | 611 228 | 647 312 | 681 604 | 716 484 | 750 755 | 784 628 |
|                      | Current estimates high scenario                                                  | 570 446            | 625 675 | 682 826 | 733 699 | 783 528 | 831 715 | 882 311 |
|                      | Low Mbombela Reconciliation Strategy (DWS, 2014)                                 | 558 277            | 619 555 | 659 004 | 693 642 | 721 798 | --      | --      |
|                      | High Mbombela Reconciliation Strategy (DWS, 2014)                                | 559 654            | 631 147 | 685 179 | 735 385 | 778 321 | --      | --      |
|                      | City of Mbombela Vision 2030 (CoM, 2017b)                                        | 588 794            | 650 912 | --      | --      | 856 925 | --      | --      |
| Umjindi LM (former)  | Current estimates realistic scenario                                             | 62 778             | 69 517  | 73 565  | 77 617  | 81 866  | 86 304  | 90 922  |
|                      | Current estimates high scenario                                                  | 62 778             | 72 397  | 79 961  | 85 420  | 91 072  | 96 842  | 102 925 |
|                      | City of Mbombela Vision 2030 (CoM, 2017b)                                        | 69 577             | 78 552  | --      | --      | 108 952 | --      | --      |
| Bushbuckridge LM     | Current estimates realistic scenario                                             | 528 388            | 538 801 | 546 244 | 553 638 | 561 102 | 568 632 | 576 233 |
|                      | Current estimates high scenario                                                  | 528 388            | 548 854 | 569 644 | 590 126 | 610 294 | 630 120 | 649 579 |
|                      | DWS Water Reconciliation Strategy Sabie and Sand River System (DWS, 2015) low    | --                 | 610 620 | 641 768 | 661 253 | 677 951 | 686 468 | 695 091 |
|                      | DWS Water Reconciliation Strategy Sabie and Sand River System (DWS, 2015) medium | --                 | 613 643 | 661 068 | 700 829 | 739 317 | 772 233 | 805 616 |
|                      | DWS Water Reconciliation Strategy Sabie and Sand River System, (DWS, 2015) high  | --                 | 616 666 | 680 849 | 742 545 | 805 860 | 868 140 | 932 932 |

**Table 4-4: 5 year interval average annual Population Growth per Local Municipality as per the Various Sources**

| Municipality         | Source                                                                                    | Average Population Growth per annum |           |           |           |           |           |
|----------------------|-------------------------------------------------------------------------------------------|-------------------------------------|-----------|-----------|-----------|-----------|-----------|
|                      |                                                                                           | 2010-2015                           | 2015-2020 | 2020-2025 | 2025-2030 | 2030-2035 | 2035-2040 |
| Mbombela LM (former) | Current estimates realistic scenario                                                      | 1.4%                                | 1.2%      | 1.0%      | 1.0%      | 0.9%      | 0.9%      |
|                      | Current estimates high scenario                                                           | 1.8%                                | 1.8%      | 1.4%      | 1.3%      | 1.2%      | 1.2%      |
|                      | DWS Mbombela Reconciliation Strategy (DWS, 2014) low scenario                             | 2.1%                                | 1.2%      | 1.0%      | 0.8%      | -         | -         |
|                      | DWS Mbombela Reconciliation Strategy (DWS, 2014) high scenario                            | 2.4%                                | 1.7%      | 1.4%      | 1.1%      | -         | -         |
|                      | City of Mbombela Vision 2030 (CoM, 2017b)                                                 | 2.0%                                | -         | -         | -         | -         | -         |
| Umjindi LM (former)  | Current estimates realistic scenario                                                      | 2.1%                                | 1.1%      | 1.1%      | 1.1%      | 1.1%      | 1.0%      |
|                      | Current estimates high scenario                                                           | 2.9%                                | 2.0%      | 1.3%      | 1.3%      | 1.2%      | 1.2%      |
|                      | City of Mbombela Vision 2030 (CoM, 2017b)                                                 | 2.5%                                | -         | -         | -         | -         | -         |
| Bushbuckridge LM     | Current estimates realistic scenario                                                      | 0.4%                                | 0.3%      | 0.3%      | 0.3%      | 0.3%      | 0.3%      |
|                      | Current estimates high scenario                                                           | 0.8%                                | 0.7%      | 0.7%      | 0.7%      | 0.6%      | 0.6%      |
|                      | DWS Water Reconciliation Strategy Sabie and Sand River System (DWS, 2015) low scenario    |                                     | 1.0%      | 0.6%      | 0.5%      | 0.3%      | 0.2%      |
|                      | DWS Water Reconciliation Strategy Sabie and Sand River System (DWS, 2015) medium scenario |                                     | 1.5%      | 1.2%      | 1.1%      | 0.9%      | 0.9%      |
|                      | DWS Water Reconciliation Strategy Sabie and Sand River System (DWS, 2015) high scenario   |                                     | 2.0%      | 1.7%      | 1.6%      | 1.5%      | 1.4%      |

**Table 4-3** and **Table 4-4** reveals that the estimated population projections and growth rates are both realistic and comparable to other estimates for the former Umjindi LM. The projections in the City of Mbombela Vision 2030 (CoM, 2017b) is, however, slightly higher than that projected for the former Mbombela LM, as the projected base population figures start off from a higher base than that of this Study and the aligned StatsSA Census figures. Whereas the projections for Bushbuckridge LM are less comparable, since the latest population projections are based on the most recent StatsSA Census figures, which also reveal a close relationship with the latest Eskom SBC. Furthermore, the projections from this study, are based on official figures, and also account for lower growth trends in rural areas and higher urbanisation rates.

The distribution of the projected population per WSS up until 2040 for the realistic and high growth scenarios are given in **Table 4-5** and **Table 4-6** below.

**Table 4-5: Realistic Population Growth Scenario per Water Supply Scheme from 2016 to 2040**

| WSS                                     | REALISTIC SCENARIO: PROJECTED POPULATION FIGURES |                |                |                |                |                |                |
|-----------------------------------------|--------------------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                                         | 2016                                             | 2018           | 2020           | 2025           | 2030           | 2035           | 2040           |
| Elandshoek                              | 1 450                                            | 1 494          | 1 530          | 1 616          | 1 707          | 1 803          | 1 904          |
| Hazyview                                | 4 537                                            | 4 657          | 4 776          | 5 079          | 5 378          | 5 694          | 6 029          |
| Matsulu                                 | 54 723                                           | 56 524         | 58 197         | 62 147         | 65 719         | 68 918         | 72 273         |
| Mbombela                                | 73 336                                           | 78 475         | 83 417         | 94 378         | 105 227        | 115 611        | 125 160        |
| Mpakeni                                 | 1 441                                            | 1 460          | 1 479          | 1 528          | 1 579          | 1 632          | 1 686          |
| Ngodwana                                | 3 875                                            | 3 957          | 4 040          | 4 257          | 4 485          | 4 726          | 4 979          |
| Nsikazi North                           | 172 509                                          | 173 131        | 173 754        | 175 403        | 177 066        | 178 746        | 180 442        |
| Nsikazi South                           | 274 968                                          | 279 108        | 283 310        | 294 478        | 306 440        | 318 888        | 331 842        |
| White River                             | 30 777                                           | 32 969         | 35 079         | 40 341         | 45 757         | 51 258         | 56 778         |
| Esperado                                | 548                                              | 560            | 573            | 605            | 639            | 676            | 714            |
| Mandela / Mlambongwane                  | 246                                              | 251            | 257            | 272            | 287            | 303            | 321            |
| Sabie River Eco Estate                  | 400                                              | 600            | 900            | 1 500          | 2 200          | 2 500          | 2 500          |
| <b>Mbombela LM (former) excl. rural</b> | <b>618 810</b>                                   | <b>633 186</b> | <b>647 312</b> | <b>681 604</b> | <b>716 484</b> | <b>750 755</b> | <b>784 628</b> |
| Barberton                               | 60 317                                           | 61 566         | 62 841         | 66 314         | 69 979         | 73 808         | 77 804         |
| Sheba Siding                            | 1 908                                            | 1 963          | 2 007          | 2 109          | 2 211          | 2 318          | 2 430          |
| Shiyalongubo                            | 395                                              | 419            | 431            | 456            | 482            | 506            | 532            |
| Kamadakwa                               | 5 977                                            | 6 170          | 6 339          | 6 695          | 7 054          | 7 432          | 7 811          |
| Fairview Mine                           | 587                                              | 599            | 611            | 639            | 668            | 697            | 727            |
| Noord Kaap                              | 1 249                                            | 1 297          | 1 336          | 1 404          | 1 472          | 1 543          | 1 618          |
| <b>Umjindi LM (former) excl. rural</b>  | <b>70 433</b>                                    | <b>72 014</b>  | <b>73 565</b>  | <b>77 617</b>  | <b>81 866</b>  | <b>86 304</b>  | <b>90 922</b>  |

| WSS                                 | REALISTIC SCENARIO: PROJECTED POPULATION FIGURES |                |                |                |                |                |                |
|-------------------------------------|--------------------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                                     | 2016                                             | 2018           | 2020           | 2025           | 2030           | 2035           | 2040           |
| Acornhoek                           | 213 406                                          | 214 389        | 215 376        | 217 864        | 220 381        | 222 927        | 225 503        |
| Thulamahashe                        | 141 686                                          | 142 566        | 143 451        | 145 688        | 147 961        | 150 268        | 152 612        |
| Hoxani                              | 149 213                                          | 149 990        | 150 771        | 152 741        | 154 737        | 156 759        | 158 808        |
| Marite                              | 36 001                                           | 36 339         | 36 646         | 37 345         | 38 023         | 38 678         | 39 310         |
| <b>Bushbuckridge LM excl. rural</b> | <b>540 306</b>                                   | <b>543 284</b> | <b>546 244</b> | <b>553 638</b> | <b>561 102</b> | <b>568 632</b> | <b>576 233</b> |

**Table 4-6: High Population Growth Scenario per Water Supply Scheme from 2016 to 2040**

| WSS                                     | HIGH GROWTH SCENARIO:<br>PROJECTED POPULATION FIGURES |                |                |                |                |                |                |
|-----------------------------------------|-------------------------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                                         | 2016                                                  | 2018           | 2020           | 2025           | 2030           | 2035           | 2040           |
| Elandshoek                              | 2 074                                                 | 2 330          | 2 521          | 2 783          | 2 998          | 3 230          | 3 479          |
| Hazyview                                | 4 537                                                 | 4 663          | 4 793          | 5 120          | 5 458          | 5 805          | 6 161          |
| Matsulu                                 | 54 723                                                | 56 726         | 58 802         | 63 347         | 68 066         | 72 955         | 78 006         |
| Mbombela                                | 73 336                                                | 79 057         | 85 225         | 98 799         | 111 782        | 123 416        | 136 262        |
| Mpakeni                                 | 1 578                                                 | 1 642          | 1 708          | 1 840          | 1 977          | 2 119          | 2 266          |
| Ngodwana                                | 4 351                                                 | 4 661          | 4 993          | 5 895          | 6 920          | 8 079          | 9 382          |
| Nsikazi North                           | 178 919                                               | 181 793        | 184 713        | 191 270        | 197 818        | 204 350        | 210 858        |
| Nsikazi South                           | 283 016                                               | 288 705        | 294 508        | 308 994        | 323 652        | 338 458        | 353 390        |
| White River                             | 33 003                                                | 38 495         | 43 253         | 52 623         | 61 005         | 69 022         | 78 092         |
| Esperado                                | 903                                                   | 934            | 965            | 1 046          | 1 131          | 1 219          | 1 311          |
| Mandela / Mlambongwane                  | 416                                                   | 430            | 445            | 482            | 521            | 562            | 604            |
| Sabie River Eco Estate                  | 400                                                   | 600            | 900            | 1 500          | 2 200          | 2 500          | 2 500          |
| <b>Mbombela LM (former) excl. rural</b> | <b>637 256</b>                                        | <b>660 036</b> | <b>682 826</b> | <b>733 699</b> | <b>783 528</b> | <b>831 715</b> | <b>882 311</b> |
| Barberton                               | 60 706                                                | 62 110         | 63 547         | 67 286         | 71 245         | 75 437         | 79 875         |
| Sheba Siding                            | 2 093                                                 | 2 212          | 2 324          | 2 591          | 2 833          | 3 052          | 3 279          |
| Shiyalongubo                            | 395                                                   | 433            | 460            | 507            | 547            | 587            | 629            |
| Kamadakwa                               | 8 998                                                 | 10 110         | 10 935         | 12 073         | 13 200         | 14 220         | 15 279         |
| Fairview Mine                           | 587                                                   | 607            | 628            | 681            | 736            | 793            | 853            |
| Noord Kaap                              | 1 669                                                 | 1 911          | 2 067          | 2 282          | 2 511          | 2 753          | 3 010          |
| <b>Umjindi LM (former) excl. rural</b>  | <b>74 448</b>                                         | <b>77 383</b>  | <b>79 961</b>  | <b>85 420</b>  | <b>91 072</b>  | <b>96 842</b>  | <b>102 925</b> |
| Acornhoek                               | 218 719                                               | 221 898        | 225 124        | 232 976        | 240 689        | 248 255        | 255 664        |
| Thulamahashe                            | 143 367                                               | 144 939        | 146 529        | 150 376        | 154 124        | 157 771        | 161 317        |
| Hoxani                                  | 153 991                                               | 156 757        | 159 572        | 166 465        | 173 290        | 180 034        | 186 685        |
| Marite                                  | 36 897                                                | 37 650         | 38 419         | 40 309         | 42 191         | 44 060         | 45 913         |
| <b>Bushbuckridge LM excl. rural</b>     | <b>552 974</b>                                        | <b>561 244</b> | <b>569 644</b> | <b>590 126</b> | <b>610 294</b> | <b>630 120</b> | <b>649 579</b> |

The average growth per 5 year interval, over the 30 years (2010 to 2040), for the LMs are:

- Former Mbombela LM entailed an approximate 35,000 additional people per five year interval;
- Former Umjindi LM entailed an approximate additional 4,700 people on average per five year interval; and
- Bushbuckridge LM entailed an approximate additional 8,000 people on average per five year interval.

Indications of the annual population growth per WSS for the realistic scenario are given in **Table 4-7** below.

**Table 4-7: Average Annual Population Growth per Water Supply Scheme for the Realistic Scenario**

| WSS                                     | Population Growth per Five Year Interval |             |             |             |             |             |             |
|-----------------------------------------|------------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|
|                                         | 2010-15                                  | 2015-20     | 2020-25     | 2025-30     | 2030-35     | 2035-40     | 2010-40     |
| Elandshoek                              | 9.7%                                     | 2.0%        | 1.1%        | 1.1%        | 1.1%        | 1.1%        | <b>2.6%</b> |
| Hazyview                                | 2.6%                                     | 1.3%        | 1.2%        | 1.2%        | 1.1%        | 1.1%        | <b>1.4%</b> |
| Matsulu                                 | 2.0%                                     | 1.6%        | 1.3%        | 1.1%        | 1.0%        | 1.0%        | <b>1.3%</b> |
| Mbombela                                | 4.9%                                     | 3.4%        | 2.5%        | 2.2%        | 1.9%        | 1.6%        | <b>2.8%</b> |
| Mpakeni                                 | 1.2%                                     | 0.6%        | 0.7%        | 0.7%        | 0.7%        | 0.7%        | <b>0.7%</b> |
| Ngodwana                                | 2.5%                                     | 1.1%        | 1.1%        | 1.0%        | 1.1%        | 1.0%        | <b>1.3%</b> |
| Nsikazi North                           | 0.1%                                     | 0.2%        | 0.2%        | 0.2%        | 0.2%        | 0.2%        | <b>0.2%</b> |
| Nsikazi South                           | 0.7%                                     | 0.7%        | 0.8%        | 0.8%        | 0.8%        | 0.8%        | <b>0.8%</b> |
| White River                             | 7.9%                                     | 4.3%        | 2.8%        | 2.6%        | 2.3%        | 2.1%        | <b>3.6%</b> |
| Esperado                                | 0.0%                                     | 1.1%        | 1.1%        | 1.1%        | 1.1%        | 1.1%        | <b>0.9%</b> |
| Mandela / Mlambongwane                  | 0.0%                                     | 1.1%        | 1.1%        | 1.1%        | 1.1%        | 1.2%        | <b>0.9%</b> |
| Sabie River Eco Estate                  | 0.0%                                     | 17.6%       | 10.8%       | 8.0%        | 2.6%        | 0.0%        | <b>6.3%</b> |
| <b>Mbombela LM (former) excl. rural</b> | <b>1.4%</b>                              | <b>1.2%</b> | <b>1.0%</b> | <b>1.0%</b> | <b>0.9%</b> | <b>0.9%</b> | <b>1.1%</b> |
| Barberton                               | 1.1%                                     | 1.0%        | 1.1%        | 1.1%        | 1.1%        | 1.1%        | <b>1.1%</b> |
| Sheba Siding                            | 2.2%                                     | 1.3%        | 1.0%        | 0.9%        | 0.9%        | 0.9%        | <b>1.2%</b> |
| Shiyalongubo                            | 15.2%                                    | 3.0%        | 1.1%        | 1.1%        | 1.0%        | 1.0%        | <b>3.6%</b> |
| Kamadakwa                               | 13.0%                                    | 1.8%        | 1.1%        | 1.1%        | 1.0%        | 1.0%        | <b>3.1%</b> |
| Fairview Mine                           | 6.1%                                     | 1.2%        | 0.9%        | 0.9%        | 0.9%        | 0.8%        | <b>1.8%</b> |
| Noord Kaap                              | 11.8%                                    | 2.1%        | 1.0%        | 1.0%        | 0.9%        | 1.0%        | <b>2.9%</b> |
| <b>Umjindi LM (former) excl. rural</b>  | <b>2.1%</b>                              | <b>1.1%</b> | <b>1.1%</b> | <b>1.1%</b> | <b>1.1%</b> | <b>1.0%</b> | <b>1.2%</b> |
| Acornhoek                               | 0.6%                                     | 0.2%        | 0.2%        | 0.2%        | 0.2%        | 0.2%        | <b>0.3%</b> |
| Thulamahashe                            | -0.2%                                    | 0.3%        | 0.3%        | 0.3%        | 0.3%        | 0.3%        | <b>0.2%</b> |
| Hoxani                                  | 0.5%                                     | 0.3%        | 0.3%        | 0.3%        | 0.3%        | 0.3%        | <b>0.3%</b> |
| Marite                                  | 0.8%                                     | 0.5%        | 0.4%        | 0.4%        | 0.3%        | 0.3%        | <b>0.4%</b> |
| <b>Bushbuckridge LM excl. rural</b>     | <b>0.4%</b>                              | <b>0.3%</b> | <b>0.3%</b> | <b>0.3%</b> | <b>0.3%</b> | <b>0.3%</b> | <b>0.3%</b> |



Indications of the annual population growth per WSS for the high growth scenario are given in **Table 4-8** below.

**Table 4-8: Average Annual Population Growth per Water Supply Scheme for the High Scenario**

| WSS                                     | Population Growth per Five Year Interval |             |             |             |             |             |             |
|-----------------------------------------|------------------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|
|                                         | 2010-15                                  | 2015-20     | 2020-25     | 2025-30     | 2030-35     | 2035-40     | 2010-40     |
| Elandshoek                              | 15.8%                                    | 6.7%        | 2.0%        | 1.5%        | 1.5%        | 1.5%        | 4.7%        |
| Hazyview                                | 2.6%                                     | 1.4%        | 1.3%        | 1.3%        | 1.2%        | 1.2%        | 1.5%        |
| Matsulu                                 | 2.0%                                     | 1.8%        | 1.5%        | 1.4%        | 1.4%        | 1.3%        | 1.6%        |
| Mbombela                                | 4.9%                                     | 3.9%        | 3.0%        | 2.5%        | 2.0%        | 2.0%        | 3.0%        |
| Mpakeni                                 | 2.7%                                     | 2.1%        | 1.5%        | 1.4%        | 1.4%        | 1.4%        | 1.7%        |
| Ngodwana                                | 4.4%                                     | 3.5%        | 3.4%        | 3.3%        | 3.1%        | 3.0%        | 3.4%        |
| Nsikazi North                           | 0.6%                                     | 0.8%        | 0.7%        | 0.7%        | 0.7%        | 0.6%        | 0.7%        |
| Nsikazi South                           | 1.2%                                     | 1.0%        | 1.0%        | 0.9%        | 0.9%        | 0.9%        | 1.0%        |
| White River                             | 9.0%                                     | 7.6%        | 4.0%        | 3.0%        | 2.5%        | 2.5%        | 4.7%        |
| Esperado                                | 0.0%                                     | 1.7%        | 1.6%        | 1.6%        | 1.5%        | 1.5%        | 1.3%        |
| Mandela / Mlambongwane                  | 0.0%                                     | 1.7%        | 1.6%        | 1.6%        | 1.5%        | 1.5%        | 1.3%        |
| Sabie River Eco Estate                  | 0.0%                                     | 17.6%       | 10.8%       | 8.0%        | 2.6%        | 0.0%        | 6.3%        |
| <b>Mbombela LM (former) excl. rural</b> | <b>1.8%</b>                              | <b>1.8%</b> | <b>1.4%</b> | <b>1.3%</b> | <b>1.2%</b> | <b>1.2%</b> | <b>1.5%</b> |
| Barberton                               | 1.2%                                     | 1.2%        | 1.2%        | 1.2%        | 1.2%        | 1.1%        | 1.2%        |
| Sheba Siding                            | 3.7%                                     | 2.8%        | 2.2%        | 1.8%        | 1.5%        | 1.4%        | 2.2%        |
| Shiyalongubo                            | 15.2%                                    | 4.3%        | 2.0%        | 1.5%        | 1.4%        | 1.4%        | 4.2%        |
| Kamadakwa                               | 20.3%                                    | 6.7%        | 2.0%        | 1.8%        | 1.5%        | 1.4%        | 5.4%        |
| Fairview Mine                           | 6.1%                                     | 1.7%        | 1.6%        | 1.6%        | 1.5%        | 1.5%        | 2.3%        |
| Noord Kaap                              | 16.9%                                    | 6.6%        | 2.0%        | 1.9%        | 1.9%        | 1.8%        | 5.0%        |
| <b>Umjindi LM (former) excl. rural</b>  | <b>2.9%</b>                              | <b>2.0%</b> | <b>1.3%</b> | <b>1.3%</b> | <b>1.2%</b> | <b>1.2%</b> | <b>1.7%</b> |
| Acornhoek                               | 1.0%                                     | 0.7%        | 0.7%        | 0.7%        | 0.6%        | 0.6%        | 0.7%        |
| Thulamahashe                            | 0.0%                                     | 0.5%        | 0.5%        | 0.5%        | 0.5%        | 0.4%        | 0.4%        |
| Hoxani                                  | 1.1%                                     | 0.9%        | 0.8%        | 0.8%        | 0.8%        | 0.7%        | 0.8%        |
| Marite                                  | 1.2%                                     | 1.0%        | 1.0%        | 0.9%        | 0.9%        | 0.8%        | 1.0%        |
| <b>Bushbuckridge LM excl. rural</b>     | <b>0.8%</b>                              | <b>0.7%</b> | <b>0.7%</b> | <b>0.7%</b> | <b>0.6%</b> | <b>0.6%</b> | <b>0.7%</b> |

#### 4.2.2 Household Projections

The projected number of households for both the realistic and high scenarios for the City of Mbombela and Bushbuckridge LMs are given in **Table 4-9** below.

**Table 4-9: Projected Number of Households per 5 year interval from 2010 to 2040**

| Municipality                     | Scenario  | Number of Households |         |         |         |         |         |         |
|----------------------------------|-----------|----------------------|---------|---------|---------|---------|---------|---------|
|                                  |           | 2010                 | 2015    | 2020    | 2025    | 2030    | 2035    | 2040    |
| Mbombela LM (former) excl. rural | Realistic | 156 104              | 178 258 | 192 517 | 205 593 | 219 166 | 232 985 | 247 092 |
|                                  | High      | 156 286              | 182 662 | 203 647 | 222 166 | 240 808 | 259 514 | 279 562 |
| Umjindi LM (former) excl. rural  | Realistic | 18 067               | 23 014  | 24 617  | 26 227  | 27 934  | 29 736  | 31 634  |
|                                  | High      | 18 067               | 23 974  | 26 787  | 28 896  | 31 113  | 33 410  | 35 859  |
| Bushbuckridge LM excl. rural     | Realistic | 131 276              | 135 211 | 139 857 | 145 381 | 151 115 | 157 065 | 163 241 |
|                                  | High      | 131 276              | 137 731 | 145 840 | 154 948 | 164 342 | 174 021 | 183 985 |

The numbers of households within the WSS from 2016 to 2040 per scenario are presented in **Table 4-10** and **Table 4-11** below. Depending on the scenario, the 2040 projected households for former Mbombela LM is between 247,092 and 279,562 households, for former Umjindi LM between 31,634 and 35,859 households, and for Bushbuckridge LM between 163,241 and 183,985 households.

**Table 4-10: Projected Number of Households per Water Supply Scheme for the Realistic Scenario from 2016 to 2040**

| WSS                                     | REALISTIC SCENARIO: PROJECTED NUMBER OF HOUSEHOLDS |                |                |                |                |                |                |
|-----------------------------------------|----------------------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                                         | 2016                                               | 2018           | 2020           | 2025           | 2030           | 2035           | 2040           |
| Elandshoek                              | 515                                                | 531            | 543            | 574            | 606            | 640            | 676            |
| Hazyview                                | 1 363                                              | 1 413          | 1 464          | 1 581          | 1 699          | 1 826          | 1 963          |
| Matsulu                                 | 15 137                                             | 15 793         | 16 425         | 17 807         | 19 117         | 20 353         | 21 669         |
| Mbombela                                | 20 951                                             | 22 646         | 24 315         | 27 929         | 31 613         | 35 262         | 38 756         |
| Mpakeni                                 | 395                                                | 404            | 414            | 434            | 455            | 478            | 501            |
| Ngodwana                                | 2 102                                              | 2 146          | 2 192          | 2 309          | 2 433          | 2 563          | 2 701          |
| Nsikazi North                           | 51 875                                             | 52 588         | 53 310         | 54 636         | 55 994         | 57 386         | 58 812         |
| Nsikazi South                           | 77 926                                             | 79 898         | 81 920         | 86 446         | 91 328         | 96 485         | 101 933        |
| White River                             | 9 926                                              | 10 740         | 11 543         | 13 409         | 15 363         | 17 383         | 19 450         |
| Esperado                                | 214                                                | 219            | 224            | 236            | 250            | 264            | 279            |
| Mandela / Mlambongwane                  | 72                                                 | 74             | 77             | 82             | 88             | 95             | 102            |
| Sabie River Eco Estate                  | 40                                                 | 60             | 90             | 150            | 220            | 250            | 250            |
| <b>Mbombela LM (former) excl. rural</b> | <b>180 516</b>                                     | <b>186 512</b> | <b>192 517</b> | <b>205 593</b> | <b>219 166</b> | <b>232 985</b> | <b>247 092</b> |
| Barberton                               | 19 918                                             | 20 433         | 20 961         | 22 343         | 23 816         | 25 372         | 27 016         |
| Sheba Siding                            | 636                                                | 658            | 676            | 717            | 760            | 804            | 852            |
| Shiyalongubo                            | 116                                                | 124            | 129            | 139            | 149            | 159            | 169            |

| WSS                                    | REALISTIC SCENARIO: PROJECTED NUMBER OF HOUSEHOLDS |                |                |                |                |                |                |
|----------------------------------------|----------------------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                                        | 2016                                               | 2018           | 2020           | 2025           | 2030           | 2035           | 2040           |
| Kamadakwa                              | 1 921                                              | 2 003          | 2 079          | 2 218          | 2 360          | 2 512          | 2 667          |
| Fairview Mine                          | 202                                                | 206            | 210            | 220            | 230            | 240            | 250            |
| Noord Kaap                             | 525                                                | 545            | 562            | 590            | 619            | 649            | 680            |
| <b>Umjindi LM (former) excl. rural</b> | <b>23 318</b>                                      | <b>23 969</b>  | <b>24 617</b>  | <b>26 227</b>  | <b>27 934</b>  | <b>29 736</b>  | <b>31 634</b>  |
| Acornhoek                              | 55 081                                             | 55 894         | 56 718         | 58 845         | 61 051         | 63 339         | 65 714         |
| Thulamahashe                           | 35 282                                             | 35 860         | 36 447         | 37 964         | 39 545         | 41 192         | 42 907         |
| Hoxani                                 | 36 341                                             | 36 899         | 37 466         | 38 929         | 40 449         | 42 028         | 43 669         |
| Marite                                 | 8 883                                              | 9 057          | 9 226          | 9 643          | 10 070         | 10 506         | 10 951         |
| <b>Bushbuckridge LM excl. rural</b>    | <b>135 587</b>                                     | <b>137 710</b> | <b>139 857</b> | <b>145 381</b> | <b>151 115</b> | <b>157 065</b> | <b>163 241</b> |

**Table 4-11: Projected Number of Households per Water Supply Scheme for the High Scenario from 2016 to 2040**

| WSS                                     | HIGH GROWTH SCENARIO: PROJECTED NUMBER OF HOUSEHOLDS |                |                |                |                |                |                |
|-----------------------------------------|------------------------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                                         | 2016                                                 | 2018           | 2020           | 2025           | 2030           | 2035           | 2040           |
| Elandshoek                              | 736                                                  | 827            | 894            | 988            | 1 064          | 1 146          | 1 235          |
| Hazyview                                | 1 363                                                | 1 415          | 1 469          | 1 593          | 1 724          | 1 862          | 2 006          |
| Matsulu                                 | 15 137                                               | 15 850         | 16 596         | 18 150         | 19 800         | 21 545         | 23 387         |
| Mbombela                                | 20 951                                               | 22 814         | 24 842         | 29 237         | 33 583         | 37 643         | 42 194         |
| Mpakeni                                 | 432                                                  | 454            | 477            | 522            | 569            | 619            | 672            |
| Ngodwana                                | 2 359                                                | 2 527          | 2 707          | 3 196          | 3 752          | 4 380          | 5 087          |
| Nsikazi North                           | 53 802                                               | 55 218         | 56 672         | 59 577         | 62 555         | 65 605         | 68 725         |
| Nsikazi South                           | 80 207                                               | 82 646         | 85 158         | 90 708         | 96 458         | 102 406        | 108 553        |
| White River                             | 10 644                                               | 12 541         | 14 233         | 17 491         | 20 482         | 23 408         | 26 751         |
| Esperado                                | 352                                                  | 364            | 376            | 408            | 441            | 475            | 511            |
| Mandela / Mlambongwane                  | 122                                                  | 127            | 133            | 146            | 160            | 175            | 191            |
| Sabie River Eco Estate                  | 40                                                   | 60             | 90             | 150            | 220            | 250            | 250            |
| <b>Mbombela LM (former) excl. rural</b> | <b>186 145</b>                                       | <b>194 843</b> | <b>203 647</b> | <b>222 166</b> | <b>240 808</b> | <b>259 514</b> | <b>279 562</b> |
| Barberton                               | 20 046                                               | 20 613         | 21 196         | 22 669         | 24 246         | 25 932         | 27 735         |
| Sheba Siding                            | 698                                                  | 741            | 783            | 882            | 974            | 1 059          | 1 150          |
| Shiyalongubo                            | 116                                                  | 128            | 138            | 154            | 169            | 184            | 200            |
| Kamadakwa                               | 2 892                                                | 3 282          | 3 586          | 3 999          | 4 416          | 4 806          | 5 216          |
| Fairview Mine                           | 202                                                  | 209            | 216            | 234            | 253            | 273            | 294            |
| Noord Kaap                              | 701                                                  | 803            | 868            | 958            | 1 055          | 1 156          | 1 264          |
| <b>Umjindi LM (former) excl. rural</b>  | <b>24 655</b>                                        | <b>25 776</b>  | <b>26 787</b>  | <b>28 896</b>  | <b>31 113</b>  | <b>33 410</b>  | <b>35 859</b>  |

| WSS                                 | HIGH GROWTH SCENARIO: PROJECTED NUMBER OF HOUSEHOLDS |                |                |                |                |                |                |
|-------------------------------------|------------------------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                                     | 2016                                                 | 2018           | 2020           | 2025           | 2030           | 2035           | 2040           |
| Acornhoek                           | 56 452                                               | 57 851         | 59 285         | 62 926         | 66 676         | 70 535         | 74 503         |
| Thulamahashe                        | 35 701                                               | 36 457         | 37 229         | 39 186         | 41 193         | 43 249         | 45 355         |
| Hoxani                              | 37 505                                               | 38 564         | 39 653         | 42 427         | 45 299         | 48 268         | 51 335         |
| Marite                              | 9 105                                                | 9 385          | 9 673          | 10 409         | 11 174         | 11 969         | 12 792         |
| <b>Bushbuckridge LM excl. rural</b> | <b>138 763</b>                                       | <b>142 257</b> | <b>145 840</b> | <b>154 948</b> | <b>164 342</b> | <b>174 021</b> | <b>183 985</b> |

### 4.3 Population estimates for the broader Study Area

#### 4.3.1 Previous Population Estimates

The estimated population per WSS in the surrounding towns located within the broader Study Area, from other sources, are given in **Table 4-12** below. This is provided in order to serve as a comparison to the newly estimated figures for this Study.

**Table 4-12: Estimated 5 year interval Population Figures per WSS as per the Various Sources**

| Municipality and study                                                                                                                                | WSS                   | Growth scenario (Data source) | Population Figures |        |        |        |        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|-------------------------------|--------------------|--------|--------|--------|--------|
|                                                                                                                                                       |                       |                               | 2010               | 2015   | 2020   | 2025   | 2030   |
| <b>Emakhazeni LM</b><br><br>Reconciliation Strategy for Dullstroom and Sakhelwe, Machadodorp and Emthonjeni township, and Waterval Boven (DWA, 2011a) | <b>Dullstroom</b>     | Low Growth (DWA NSI)          |                    |        |        |        | 11 674 |
|                                                                                                                                                       |                       | High Growth (Census 2001)     |                    |        |        |        | 13 371 |
|                                                                                                                                                       | <b>Waterval Boven</b> | Low Growth (Census 2001)      | 6 980              | 7 520  | 8 101  | 8 27   | 9 401  |
|                                                                                                                                                       |                       | Median Growth (DWAF NSI)      | 14 481             | 15 786 | 17 210 | 18 762 | 20 454 |
|                                                                                                                                                       |                       | High Growth (Lidwala Report)  |                    |        | 20 482 |        |        |
|                                                                                                                                                       | <b>Machadodorp</b>    | Low Growth (Census 2001)      | 6 986              | 7 925  | 9 003  | 10 245 | 11 674 |
|                                                                                                                                                       |                       | Median Growth (DWAF NSI)      | 9 509              | 10 355 | 11 276 | 12 278 | 13 371 |
|                                                                                                                                                       |                       | High Growth (Lidwala Report)  | 16 641             | 19 105 | 21 934 | 25 181 | 28 909 |
|                                                                                                                                                       | <b>Cluster*</b>       | Low Growth Scenario           | 59 958             | 60 628 | 61 000 | 61 197 | 61 368 |
|                                                                                                                                                       |                       | High Growth Scenario          | 60 733             | 62 744 | 64 461 | 65 997 | 67 498 |

| Municipality and study                                                                                                                                                                                               | WSS                 | Growth scenario (Data source) | Population Figures |       |        |        |        |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------------------------------|--------------------|-------|--------|--------|--------|
|                                                                                                                                                                                                                      |                     |                               | 2010               | 2015  | 2020   | 2025   | 2030   |
| <b>Nkomazi LM</b><br><br><i>Reconciliation Strategy for Louiesville (DWA, 2011c), Hectorspruit (DWA, 2011d), Malelane (DWA, 2011e), Marloth Park (DWA, 2011f), Komatipoort (DWA, 2011g) Water Supply Scheme area</i> | <b>Louieville</b>   | Low                           | 2 457              | 2 614 | 2 680  | 2 727  | 2 775  |
|                                                                                                                                                                                                                      |                     | Median                        | 2 505              | 2 817 | 3 069  | 3 314  | 3 544  |
|                                                                                                                                                                                                                      |                     | High                          | 2 554              | 3 034 | 3 508  | 4 018  | 4 513  |
|                                                                                                                                                                                                                      | <b>Komatipoort</b>  | Low                           | 6 096              | 6 487 | 6 651  | 6 768  | 6 887  |
|                                                                                                                                                                                                                      |                     | Median                        | 6 278              | 7 233 | 8 065  | 8 872  | 9 640  |
|                                                                                                                                                                                                                      |                     | High                          | 6 462              | 8 053 | 9 750  | 11 580 | 13 424 |
|                                                                                                                                                                                                                      | <b>Marloth Park</b> | Low                           | 7 928              | 8 436 | 8 649  | 8 802  | 8 957  |
|                                                                                                                                                                                                                      |                     | Median                        | 8 085              | 9 092 | 9 904  | 10 695 | 11 437 |
|                                                                                                                                                                                                                      |                     | High                          | 8 244              | 9 791 | 11 323 | 12 968 | 14 565 |
|                                                                                                                                                                                                                      | <b>Hectorspruit</b> | Low                           | 645                | 687   | 704    | 716    | 729    |
|                                                                                                                                                                                                                      |                     | Median                        | 658                | 740   | 806    | 871    | 931    |
|                                                                                                                                                                                                                      |                     | High                          | 671                | 797   | 922    | 1 056  | 1 186  |
|                                                                                                                                                                                                                      | <b>Malelane</b>     | Low                           | 4 304              | 4 580 | 4 696  | 4 779  | 4 863  |
|                                                                                                                                                                                                                      |                     | Median                        | 4 390              | 4 936 | 5 377  | 5 807  | 6 209  |
|                                                                                                                                                                                                                      |                     | High                          | 4 476              | 5 316 | 6 147  | 7 040  | 7 907  |

\*Cluster comprises: **Sabie**, Coromandel, **Graskop**, Pilgrim's Rest, Matibidi, Ponieskrantz, Blyde Forestry Station, Morgenzon Forestry Station, Hebron, Roodewal Sam Mill, Glory Hill, Brodal, Simile, Tweefontein Forestry Station, harmony hill, **Hendriksdaal**, Polapark, Rural Thaba Chweu Ward 10, Rural Thaba Chweu Ward 11, Rural Thaba Chweu Ward 4, Rural Thaba Chweu Ward 5, Draaikraal, Boshoeck, Emshinini and Badfontein.

#### 4.3.2 High level Population Estimates

Due to data from the other sources not all being at the same lowest level, new high level population estimates per WSS have been determined.

Note that the demographic analysis for the broader Study Area is not undertaken in the same level of detail as for the WSSs within the demographic focus area, namely within City of Mbombela and Bushbuckridge LMs.

The estimates mainly rely on previous StatsSA Census information and the historic growth rates of the Emakhazeni, Thaba Chweu, and Nkomazi LMs. No detailed demographic analysis, at a lower level of confidence, was undertaken. As a result, only one base projection is provided.

The new high level population estimates per WSS up until 2040 are given in **Table 4-13** below.

**Table 4-13: High level Population estimates per Water Supply Scheme from 2011 to 2040**

| LMs            | WSS            | PROJECTED POPULATION FIGURES |        |        |        |
|----------------|----------------|------------------------------|--------|--------|--------|
|                |                | 2011                         | 2020   | 2030   | 2040   |
| Emakhazeni LM  | Dullstroom     | 5 222                        | 5 694  | 6 262  | 6 875  |
|                | Waterval Boven | 6 185                        | 6 450  | 6 750  | 7 052  |
|                | Machadodorp    | 8 941                        | 9 749  | 10 721 | 11 771 |
| Thaba Chweu LM | Hendriksdal    | 303                          | 346    | 401    | 464    |
|                | Sabie          | 15 778                       | 17 879 | 20 511 | 23 495 |
|                | Graskop        | 4 079                        | 4 663  | 5 403  | 6 250  |
| Nkomazi LM     | Louieville     | 2 420                        | 2 708  | 3 067  | 3 472  |
|                | Komatipoort    | 4 683                        | 5 575  | 6 765  | 8 205  |
|                | Marloth Park   | 1 000                        | 1 099  | 1 221  | 1 355  |
|                | Hectorspruit   | 3 096                        | 3 685  | 4 472  | 5 424  |
|                | Malelane       | 3 486                        | 4 298  | 5 424  | 6 842  |

## 5 CONCLUSIONS

The analysis of the latest demographic trends highlights the importance of the urban areas, especially the larger urban areas, in accommodating future population growth. The growth differentials between the urban towns, is directly related to the economic growth of those towns and/or people's perceptions of the economic potential of the towns. The larger towns are also influenced largely by International in migration from both Swaziland and Mozambique into the area. This International in migration into the Study Area, is however a relatively new trend and the in migration is also not all legal. This makes it difficult to determine the long-term permanency of the additional International migrants.

It is also noted, that some of the smaller towns, close to the rural areas, are also utilised as stepping stones into a more urban lifestyle. Which is why some of these towns have experienced population increases, albeit only temporary in nature, as the population intend to move on to other towns located outside of the Study Area. The long terms trends relating to this movement, are not yet fully understood and will only be fully understood over time, once more detailed lower-level data becomes available.

In regards to the rural areas, a definite decline in growth rates are noted. Previously high natural population growth rates occurred in these rural areas, although recently these natural growth rates have declined. The rural areas also experience large outmigration, mainly due to youth completing school and leaving the rural areas in search for better economic opportunities. However, rural tribal areas, located close to large towns, remain quite attractive and popular residential areas. This is due to the lower cost of living in these residential areas, ease of access and availability of land, offer familiar lifestyles and standard of living, and are located close to economic activities offered by the nearby towns. Whereas the rural areas that are not very accessible and are situated far from economic activities have experienced decline growths, and in many cases no growth.

In terms of future water provision, albeit that service deficits need to be provided in rural areas, focus needs placed on future services development in the urban areas, where the largest increase in population is expected to take place.

## 6 RECOMMENDATIONS

This Study has been undertaken based on the latest available and official statistics from StatsSA, the latest Eskom SBC, as well as consideration of inputs from stakeholders. The estimated population projections, and distribution therefore is also based on historical trends, as well as new emerging or developing trends that is noted to emanate from the aforementioned data. Consequently, these estimates are as accurate as can be, at this stage, as based on the aforementioned.

However, demographic trends, especially relating to urbanisation and migration, can change quite dramatically based on external forces. It is thus important that the population projections are regularly analysed, revised, and updated. It is recommended that updates be done every 3 to 5 years, in order to account for changing trends and new development patterns, etc. Updates are especially necessary, as and when new detailed data becomes available from StatsSA Census surveys.



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|              |                                                                                                                                                                                                                                                                                                                                    |
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### Municipal Consultations:

| Name and Surname      | Department                                 |
|-----------------------|--------------------------------------------|
| Ms. Valentine Nkosi   | Mbombela City Planning & Development       |
| Mr. Johannes Mulaudzi | Mbombela Strategic Planning                |
| Mr. Ernest Jele       | Mbombela Local Economic Development        |
| Ms. Mandisa Ndongeni  | Mbombela City Planning & Development       |
| Mr. Maarten Coetzee   | Mbombela Land Use Management               |
| Ms. Memory Lenyai     | Mbombela Economic Development Partnership  |
| Ms. Fathima Lukhele   | Mbombela Strategic Planning                |
| Mr. Sandile Mabuza    | University of Mpumalanga                   |
| Mr. Paul Mnisi        | Mpumalanga Department of Human Settlements |
| Mr. Warren Neves      | Bushbuckridge Planning Department          |
| Mr. Solomon Nyembe    | Bushbuckridge Local Economic Development   |