
**A FEASIBILITY ASSESSMENT AND SOCIO-ECONOMIC IMPACT STUDY
FOR A PROPOSED FILLING STATION AND RETAIL CENTRE ON
PORTION 104 (OF 30) OF THE FARM LELIEFONTEIN NO. 1175 AT
THORNVILLE, WITHIN MSUNDUZI MUNICIPALITY, KWAZULU-NATAL**

JANUARY 2023



REPORT INFORMATION

A FEASIBILITY ASSESSMENT AND SOCIO-ECONOMIC IMPACT STUDY FOR A PROPOSED FILLING STATION AND RETAIL CENTRE ON PORTION 104 (OF 30) OF THE FARM LELIEFONTEIN NO. 1175 AT THORNVILLE, WITHIN MSUNDUZI MUNICIPALITY, KWAZULU-NATAL

JANUARY 2023

SUBMITTED TO

MONDLI CONSULTING SERVICES	6 Joseph Avenue, Glen Anil Glenashley, 4022 Email: bm@mmcs.co.za Content details: 0824187708
-----------------------------------	--

SUBMITTED BY:

SOCIAL RISK RESEARCH (PTY) LTD 	Social Risk Research Pty Ltd 22 Botha Road, Bothas Hill, 3660 PO Box 810, Kloof, 3640 Tel: +27 31 765 5779 Mobile: + 27 82 779 3821 eugene@socialriskresearch.com
--	--

*Disclaimer: The research and analysis contained in this report is based on acceptable planning parameters and information available to the researchers at the time of the study. The decisions based on the findings in this report is that of the investor and SRR cannot be held responsible for any changes that may occur in the environment and socio-economic conditions pertaining to the study.

SPECIALIST DECLARATION OF INTEREST

Submitted in terms of section 24(2) of the National Environmental Management Act, 1998 (Act No. 107 of 1998) or for a waste management licence in terms of section 20(b) of the National Environmental Management: Waste Act, 2008 (Act No. 59 of 2008).

KINDLY NOTE:

1. This form is current as of May 2021. It is the responsibility of the Applicant / Environmental Assessment Practitioner ("EAP") to ascertain whether subsequent versions of the form have been released by the Department.

PROJECT TITLE

CONSTRUCTION OF THORNVILLE DEVELOPMENT ("THE SQUARE OF THORNVILLE") PROPOSED TO INCLUDE FUEL SERVICE STATION AND RETAIL CENTRE WITH ANCHOR SHOP, LINE SHOPS, RESTAURANTS ON PORTION 104 (OF 30) OF THE FARM LELIEFONTEIN NO. 1175 AT THORNVILLE, WITHIN MSUNDUZI MUNICIPALITY, KWAZULU – NATAL

LOCAL MUNICIPALITY

MSUNDUZI MUNICIPALITY, KWAZULU – NATAL

1. SPECIALIST INFORMATION

Specialist name:	Eugene de Beer		
Contact person:	Eugene de Beer		
Postal address:	PO BOX 810, KLOOF, 3640		
Postal code:	3640	Cell:	082 779 3821
Telephone:	082 779 3821	Fax:	-
E-mail:	Eugene@socialriskresearch.com		
Professional affiliation(s) (if any)	South African Planning Institute, 1996, 2002 Project Management South Africa International Association of Impact Assessors South Africa Economic Society South Africa (ESSA)		
Project Consultant / EAP:	Mondli Consulting Services (EAP)		
Contact person:	Brian Mthembu		
Postal address:	P.O. Box 22536, Glenashley		
Postal code:	4022	Cell:	0824187708
Telephone:	0826799841	Fax:	N/A
E-mail:	bm@mmcs.co.za / mondlib@webmail.co.za		

2. DECLARATION BY THE SPECIALIST

I, Eugene de Beer, declare that --

General declaration:

- I act as the independent specialist in this application.
- do not have and will not have any vested interest (either business, financial, personal or other) in the undertaking of the proposed activity, other than remuneration for work performed in terms of the Environmental Impact Assessment Regulations, 2014;
- I will perform the work relating to the application in an objective manner, even if this results in views and findings that are not favourable to the applicant;
- I declare that there are no circumstances that may compromise my objectivity in performing such work;
- I have expertise in conducting the specialist report relevant to this application, including knowledge of the Act, regulations and any guidelines that have relevance to the proposed activity;
- I will comply with the Act, regulations and all other applicable legislation;
- I have no, and will not engage in, conflicting interests in the undertaking of the activity;
- I undertake to disclose to the applicant and the competent authority all material information in my possession that reasonably has or may have the potential of influencing - any decision to be taken with respect to the application by the competent authority; and - the objectivity of any report, plan or document to be prepared by myself for submission to the competent authority;
- all the particulars furnished by me in this form are true and correct; and
- I am aware that a person is guilty of an offence in terms of Regulation 48 (1) of the EIA Regulations, 2014, if that person provides incorrect or misleading information. A person who is convicted of an offence in terms of sub-regulation 48(1) (a)-(e) is liable to the penalties as contemplated in section 49B(1) of the National Environmental Management Act, 1998 (Act 107 of 1998).



Signature of the specialist:

SOCIAL RISK RESEARCH PTY LTD

Name of company:

Date: 12 January 2023

TABLE OF CONTENTS

SPECIALIST DECLARATION OF INTEREST	ii
TABLES IN THE REPORT.....	v
TABLE OF FIGURES.....	v
1 INTRODUCTION	1
1.1 PURPOSE AND SCOPE OF WORK.....	1
1.2 METHODOLOGY AND INFORMATION SOURCES.....	1
2 THE PROPOSED DEVELOPMENT	3
3 PROJECT CONTEXT ANALYSIS	5
3.1 LOCATIONAL ANALYSIS.....	5
3.2 MUNICIPAL DEVELOPMENT PLANS.....	9
3.3 CONCLUSION	13
4 PROFILE OF THE RECIPIENT COMMUNITY.....	14
5 FEASIBILITY OF THE PROPOSED RETAIL CENTRE.....	18
5.1 INTRODUCTION: RETAIL TRENDS IN 2022/23	18
5.2 HIERARCHY OF RETAIL CENTRE DEVELOPMENT	20
5.3 COMPETING RETAIL CENTRES.....	22
5.4 DEMAND FOR RETAIL SPACE	28
5.5 CONCLUSION	30
6 FEASIBILITY OF THE PROPOSED FUEL SERVICE STATION	32
6.1 FILLING STATIONS IN THE MARKET AREA.....	32
6.2 DEMAND FOR A NEW FILLING STATIONS	35
6.3 MARKET TRENDS.....	36
6.4 CONCLUSION: NETT EFFECTIVE DEMAND	39
7 SOCIO-ECONOMIC IMPACT OF THE PROPOSED DEVELOPMENT	40
7.1 ECONOMIC IMPACT OF THE PROPOSED DEVELOPMENT.....	40
7.2 SOCIAL IMPACTS OF THE PROPOSED PROJECT.....	41
7.3 SOCIO-ECONOMIC IMPACT RATING.....	43
8 CONCLUSION AND RECOMMENDATION.....	45
8.1 SYNOPSIS OF FINDINGS	45
8.2 SOCIO-ECONOMIC IMPACT	46
8.3 FINAL RECOMMENDATIONS WITH MITIGATIONS	47
ANNEXURE A: SITE AND RETAIL APPLICATIONS IN MSUNDUZI / PIETERMARITZBURG AS ON 22 12 2022	48

TABLES IN THE REPORT

Table 1: The Msunduzi Ward 18 Annual household income	16
Table 2: The Msunduzi Ward 18 Goods available to household.....	16
Table 3: Typologies of retail centres	21
Table 4: Shopping Centres in Pietermaritzburg – highlights show centres closest related to the study area.....	22
Table 5: Population and households within the market catchment area	29
Table 6: Effective demand for retail development within the market area	30
Table 7: Traffic count for 12 hours on Friday 11 November 2022	35
Table 8: Fuel demand based on traffic flows and inception scenarios – excluding busses.....	36
Table 9: Total direct and indirect economic impacts of the proposed development	40
Table 10: Total trading activities impact of the proposed development	40
Table 11: Socio-economic impact rating table.....	44

TABLE OF FIGURES

Figure 1: Location of the site within regional context showing Pietermaritzburg and Thornville	5
Figure 2: Location of the site along the R56 3 km north of Thornville	6
Figure 3: Focused location of the site surrounded by semi-rural residential developments along the R56.....	7
Figure 4: Immediately surrounding the site are vacant properties and residential homes	8
Figure 5: A network of rural roads channel traffic towards the site where it joins the R56	8
Figure 6: The site is in the South-eastern planning precinct of the Municipality	9
Figure 7: The site is in Ward 18 of the Msunduzi Municipality.....	9
Figure 8: Extract from the Msunduzi SDF, 2022.....	10
Figure 9: Development potential of the site.....	10
Figure 10: Msunduzi South-eastern Districts Local Area Plan	11
Figure 11: Richmond Road Precinct	12
Figure 12: Socio-economic profile of Ward 18	14
Figure 13: Retail sales % changes year-on-year, 2018 to 2022	18
Figure 14: Shopping Centres in Pietermaritzburg	23
Figure 15: Fuel filling stations in the area of the site (NOTE THAT THE SCALE ON THE MAPS ARE DIFFERENT)	33
Figure 16: Total new vehicle sales in South Africa, 2000 to 2022	37
Figure 19: Car registrations in South Africa, 2000 to 2022	37
Figure 20: The price volatility of fuel prices in South Africa, USD per lt.....	38

1 INTRODUCTION

1.1 PURPOSE AND SCOPE OF WORK

The purpose of this project is to address the following:

- a) Feasibility study for a proposed fuel service station and retail centre with associated land-uses.
- b) Formulate a socio-economic impact assessment for the proposed development.

The assessment includes:

- A market assessment of existing trends and opportunities related to the proposed development.
- Assessment of the feasibility of the proposed development given an assessment of the supporting catchments markets. The assessment will unpack the proposed land-use activities and guiding the client with regards to the feasibility of the development.
- Identification the extent of potential socio-economic impacts during construction and operation phases of the project.

1.2 METHODOLOGY AND INFORMATION SOURCES

The key steps of this project process are outlined in the box below.



Phase 1: Concept Confirmation & Planning Review

Confirm with the client the nature and extent of the proposed development. Review of all technical and planning related documents, confirmation of the anticipated activities and determination of target markets and study area. Development preferences and any niche markets to be considered will be confirmed.

Phase 2: Market Assessment Processes

Phase 2 makes provision for the following:

- Market delineation and segmentation.
- Locational factors and any other site factors that may impact on the feasibility of the development.
- Profile of the receiving socio-economic environment.
- Existing and future market trends.
- Filling station competitor analysis.
- Traffic interception estimations.

Phase 3: Feasibility Testing

- Respond to niche market characteristics identified in Phase 2 above.
- Estimate likely fuel sales based on local and transient market demand calculations.
- Collate findings on product profile and market analysis.
- Determination of final target market.
- Develop optimal packaging and phasing for the development.
- Provide recommendations as to the refinement of the development concept.

Phase 4: Socio-Economic Impact and Key Findings and Recommendation-Effective Demand

- Develop a Socio-Economic Impact model to determine the impact on employment during and post construction.
- Assess the potential impact of existing filling stations operating within the area and provide mitigation recommendations to minimise any negative impacts.
- Based on the input from the previous phases, the key findings will be summarised, and recommendations will be formulated.
- Identify any risks and mitigation measures that might be necessary.
- This last step will be to develop a final report which highlights the key findings from the research, and to formulate recommendations towards development decisions and on the optimal target market and preferences.

Data and information sources

Desktop research and secondary data were used to undertake the study and to analyse the socio-economic profile of the market area. A desktop, statistical analysis was undertaken by accessing data and information for purposes of the socio-economic profile of the surrounding communities as well as to identify the characteristics of the population that will be served by the proposed retail centre and filling station. Key sources for this include:

- Quantec Regional Data
- Statistics SA Census Data
- Available Msunduzi Municipal reports and studies.

Desktop research was utilised to understand Msunduzi's planning framework for the area. This was done in order that to gauge the spatial development trajectory of the region and its planned interventions. Key sources for this were:

- Msunduzi Municipal Spatial Development Framework 2022/23
- Msunduzi Municipality Integrated Development Plan Review 2018/2019
- South-eastern District Local Area Plan, 2014.

Traffic count data as surveyed on Friday 11 November 2022 is used to assess the feasibility of the Filling station market demand.

2 THE PROPOSED DEVELOPMENT

The information in this section has been obtained from the environmental management practitioner through the background information document to the project and other communications. The proposed development is to comprise of the following:

1. Fuel Service Station fuel storage tanks [4 x 23 000 litres petrol], 2 x 23 000 litres diesel totalling 138 000 litres, all underground, 4 x pump islands and 8 bousers, concrete paving & canopy at the forecourt. A convenience store and fast-food outlet is to be located on the site.
2. Retail Centre with anchor shop line shops comprising
 - Restaurant
 - Pharmacy
 - Bottle store
 - Doctors' rooms
 - A gymnasium and tyre shop.
 - Taxi rank and bus terminal.

The site layout plan is being finalised. Access to the property will be determined by the traffic impact assessment (TIA) in conjunction with the relevant transport authorities. The current access to the site is off a gravel road that leads from the R56 i.e., Richmond Road.

It is the intention of the developer that the proposed development will play an important role in addressing some of the development challenges facing Msunduzi Municipality. In doing so this project may assist in achieving some of the Msunduzi Local Municipality's strategic goals. The project will provide livelihoods to local people and enhance local economic development through investment and skills development. The developer has demonstrated a commitment to the upliftment of the local people and community. In addition to the jobs that will be created, the project will also contribute to skills development in the area. The developer emphasized that priority will be given to the local community in the creation of the job and other economic spin-offs.

The shopping centre and the filling station will offer direct jobs during construction and operational phases. The development will also offer forward and backward linked jobs in the value chain and further provide opportunities for entrepreneurs in the surrounding areas through supplier

development. The project is likely to benefit the community of Thornville and the surrounding areas; by providing a convenient shopping facility at affordable prices. This will assist them not to travel to the Pietermaritzburg CBD or other centres further afield.

DRAFT

3 PROJECT CONTEXT ANALYSIS

3.1 LOCATIONAL ANALYSIS

The total site is 2, 8328 hectares in extent and in the main vacant but for a double storey dwelling on site. The site falls within the Msunduzi Municipality's area and borders onto the Richmond Municipality in the south. The site is 3 km north of the small town of Thornville which is within the Richmond Municipal area. The location of the site is as indicated on the following maps.

Figure 1: Location of the site within regional context showing Pietermaritzburg and Thornville

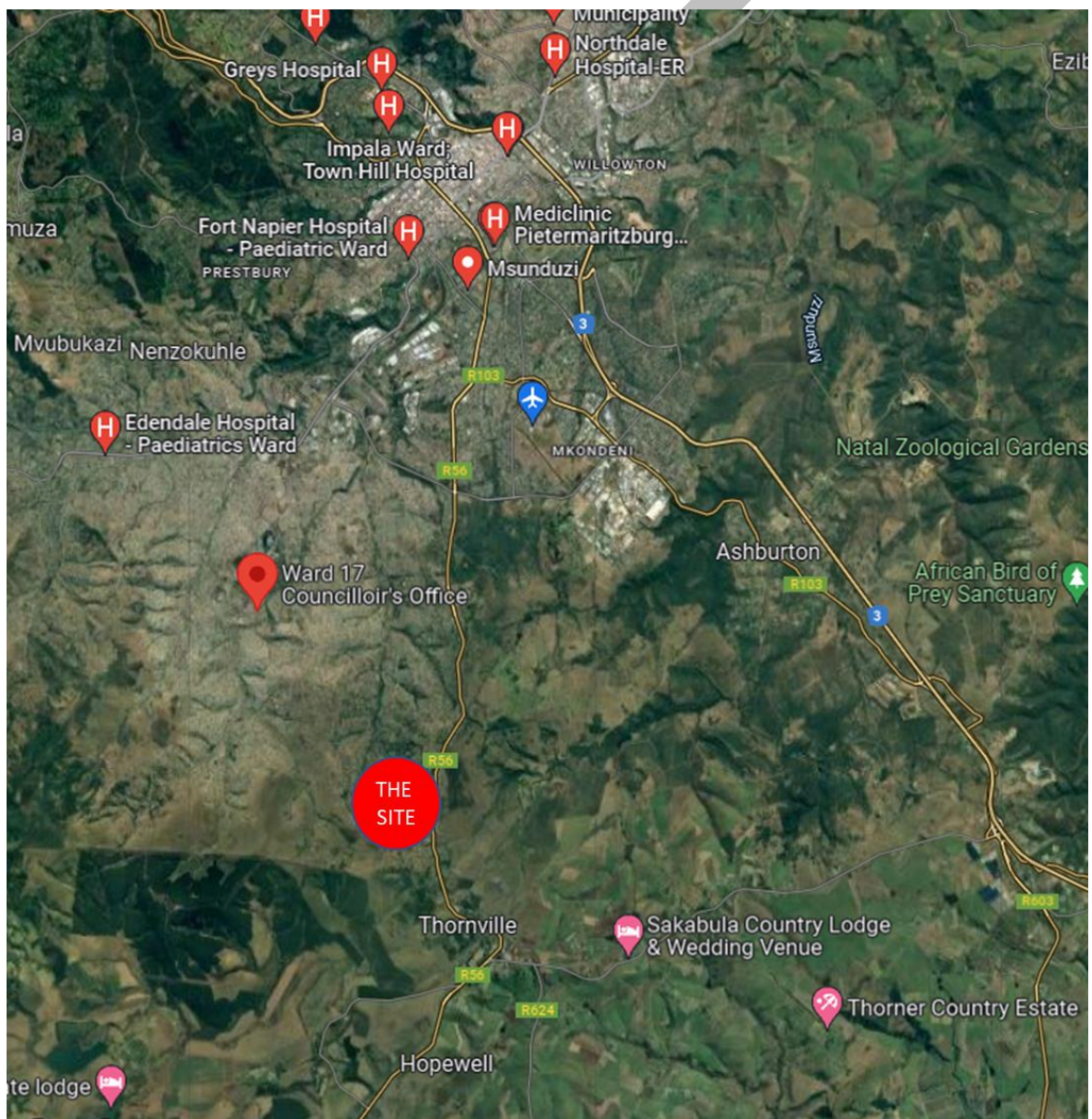
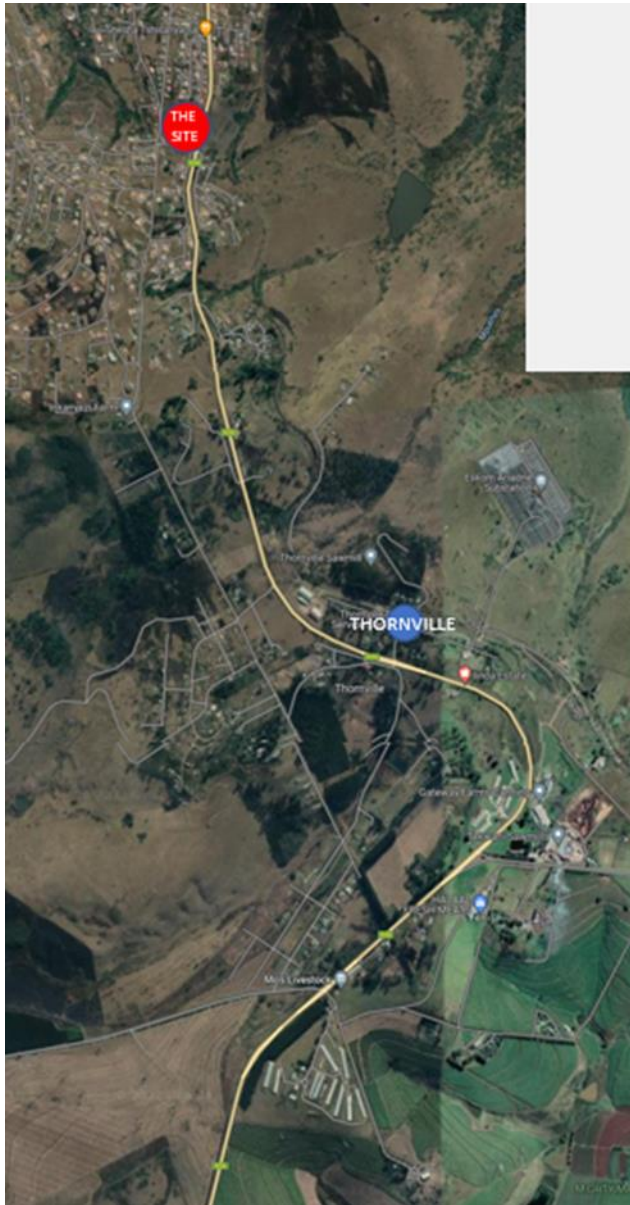


Figure 2: Location of the site along the R56 3 km north of Thornville



The site is located close to the southern boundary of Msunduzi with the Richmond Local Municipal area.

The area in which the site is located may be described as a rural area transforming rapidly into a semi-urban area with extensive individual private residential developments and some cluster housing or estate developments starting to take place in the vicinity of the site along the R56. The site is located on Ingonyama Trust land and as such falls outside of the formal urban development area and controls of the Municipality. See Figure 5.

The rapid influx on people in the area on the fringe of Msunduzi is due to the growth of the population through in-migration towards Pietermaritzburg and the availability of open land. The growth to of the population and densification of the rural areas around Pietermaritzburg is a well recorded fact. The growth and densification of the rural areas are also since municipal rates are not raised on the land, making it cheaper to develop the rural fringes of the city rather than inside the urban boundaries of the City. The development of the rural areas under The

Ingonyama Trust are less onerous as some building and site development controls are not applied as strictly than in the formal urban areas. However, it is also important to note that these rapid developing rural areas do not all enjoy full coverage of municipal services such as piped potable water, water borne sewerage systems and access to grid electricity.

There are few economic employment opportunities in the immediate area of the site. There are no industrial or commercial activities of scale within a radius of 10 km from the site. The larger employment opportunities are in the industries at Campsdrift and Mkondeni while commercial economic activities are mainly in Imbali, Edendale and Pietermaritzburg. Some agricultural and agricultural service activities are in Thornville, Hopewell and Atherstone to the south of the site in the Richmond Municipal area. Residents living in surrounding areas from the site mostly commute to the

industrial and commercial activities in Pietermaritzburg and surroundings for employment. Unemployment levels in the area of the site are generally high.

Some of the residential developments taking place in the area are significant large-scale private homes. The development of this semi-urban area has been gaining momentum over the last ten years. Figure 6 shows that the site's immediate surrounding area consist of vacant land and individual private residential developments. Many of the houses are substantially large homes that have been built in the last ten years. There are some smaller and older houses, and the expectation is that they will soon be replaced by larger private homes. Figure 7 shown that the site is well located for a local shopping centre and fuel service station. Some important rural collector roads come together at the site where it joints up with the R56 Richmond Road.

Figure 3: Focused location of the site surrounded by semi-rural residential developments along the R56

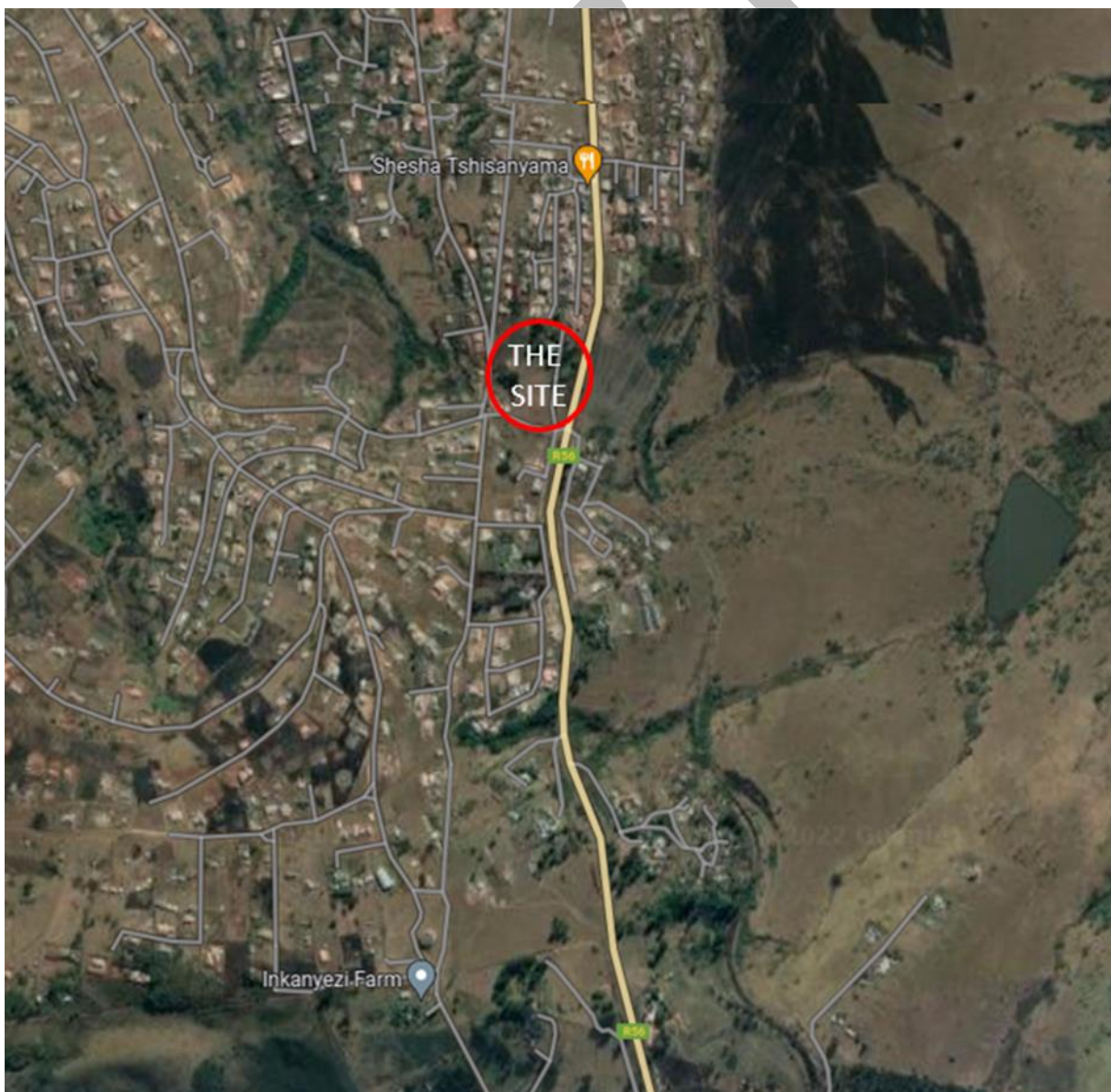
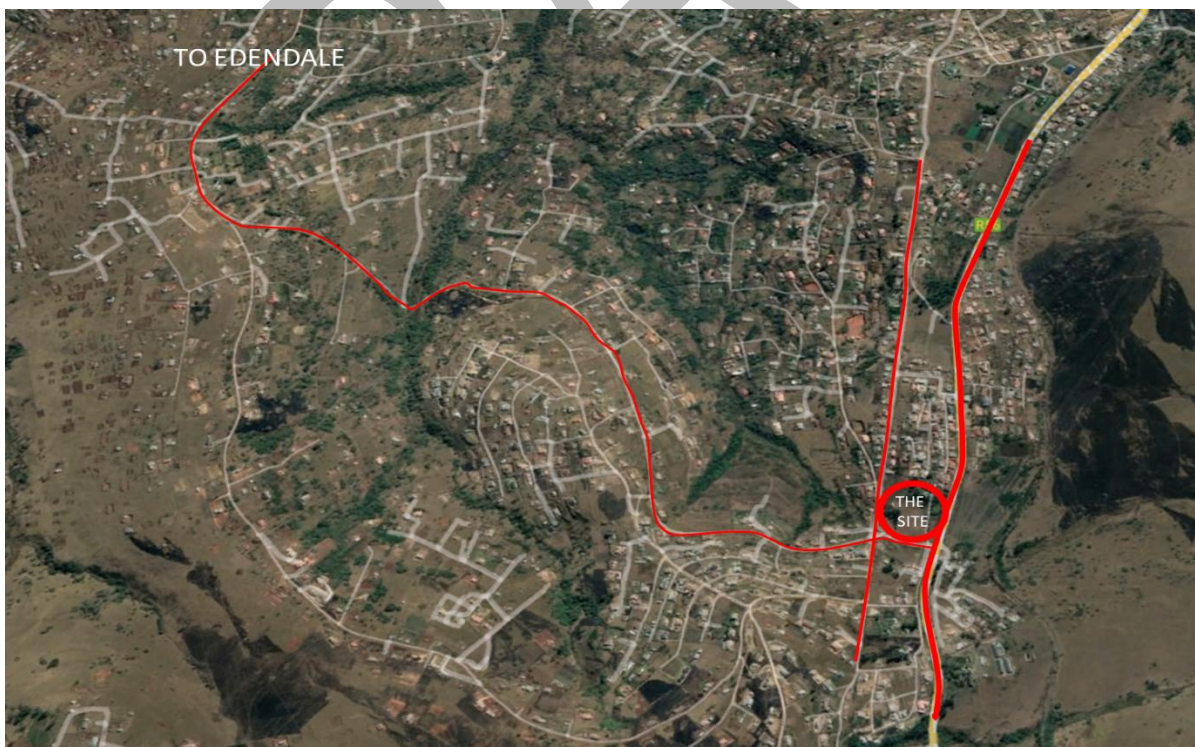


Figure 4: Immediately surrounding the site are vacant properties and residential homes



Figure 5: A network of rural roads channel traffic towards the site where it joins the R56



3.2 MUNICIPAL DEVELOPMENT PLANS

The site of the proposed development is in the South-eastern planning precinct and Ward 18 of the Msunduzi Municipality.

Figure 6: The site is in the South-eastern planning precinct of the Municipality

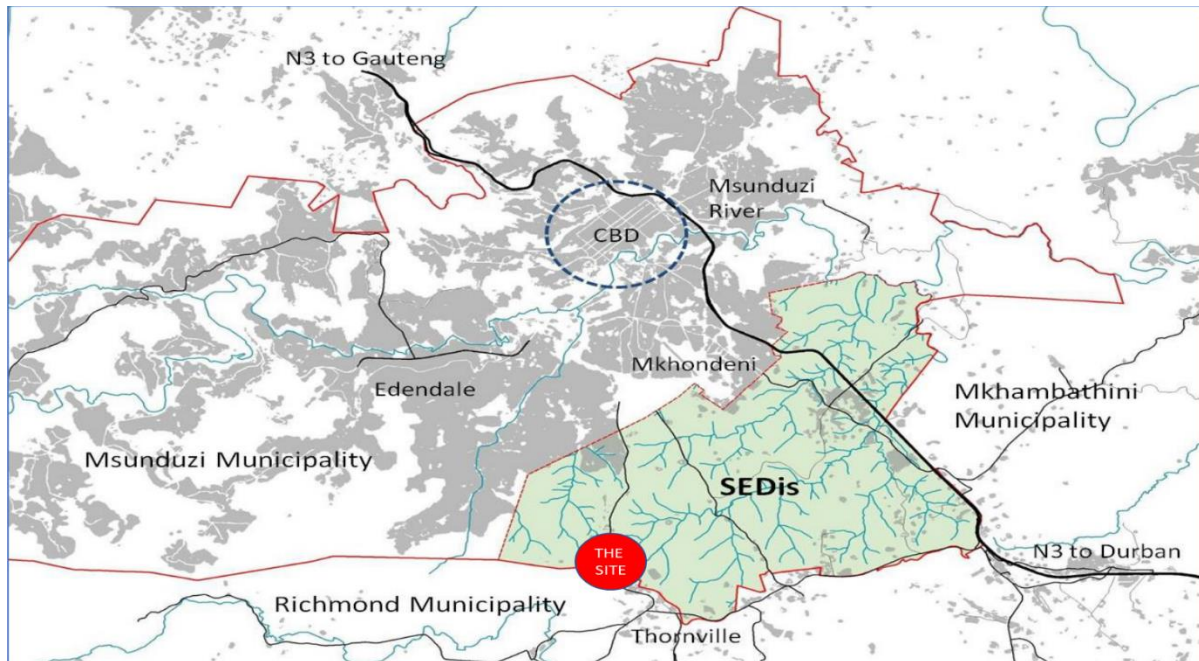
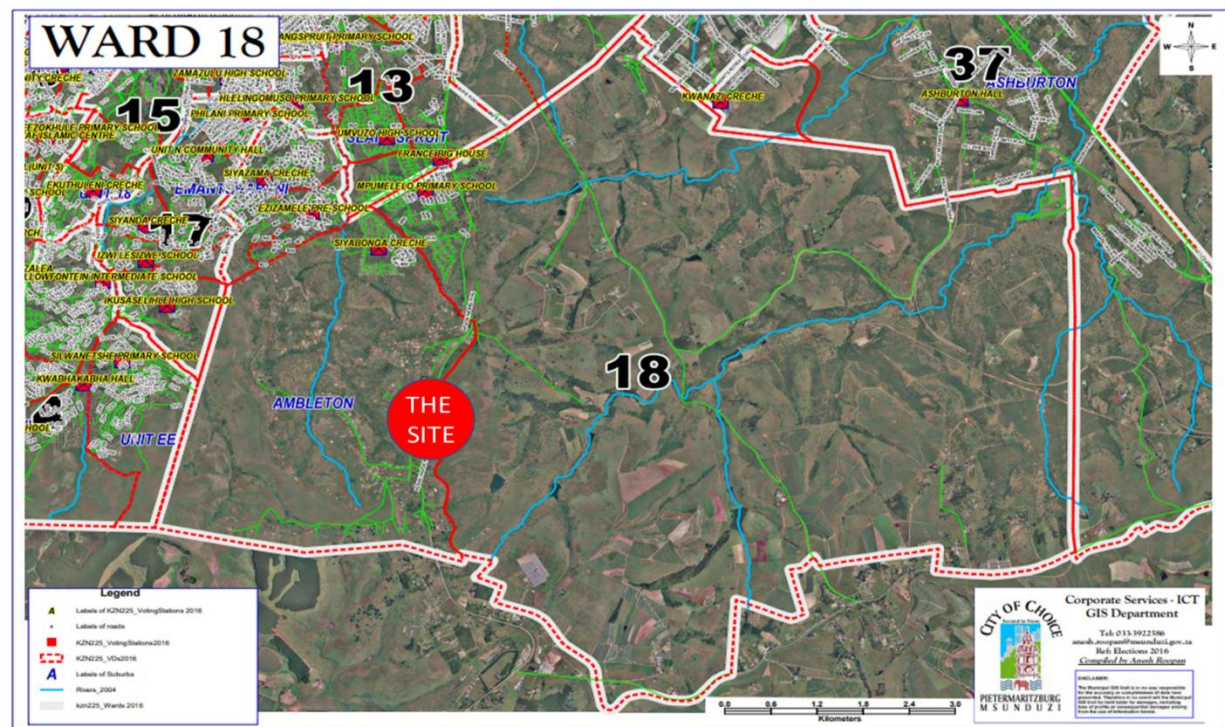
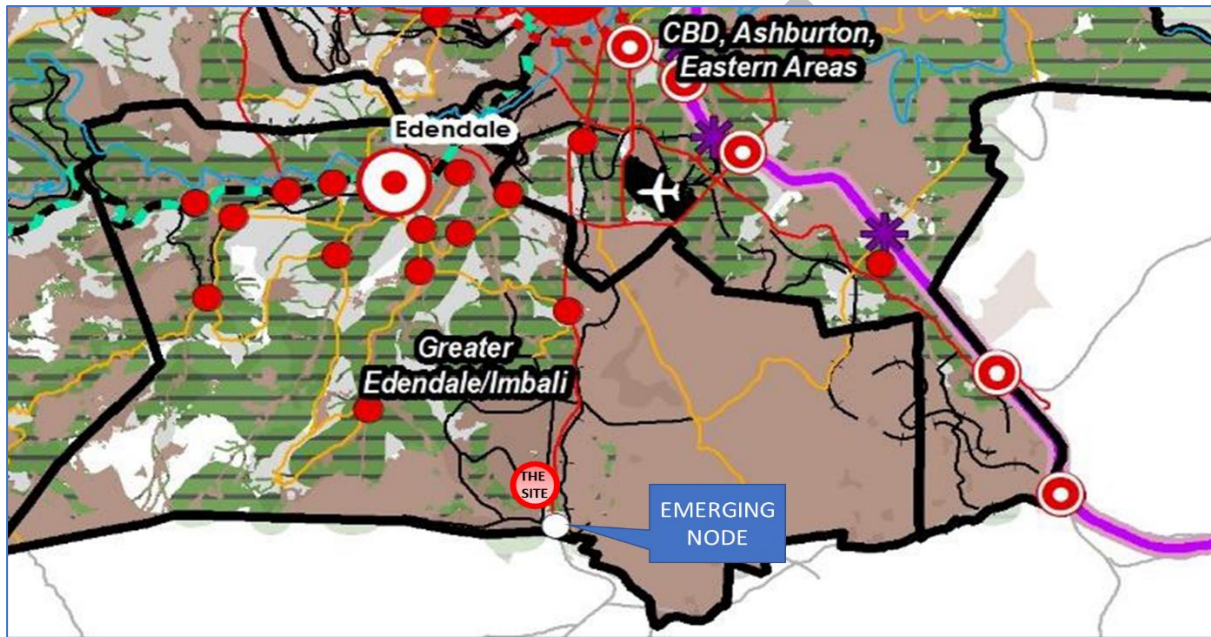


Figure 7: The site is in Ward 18 of the Msunduzi Municipality



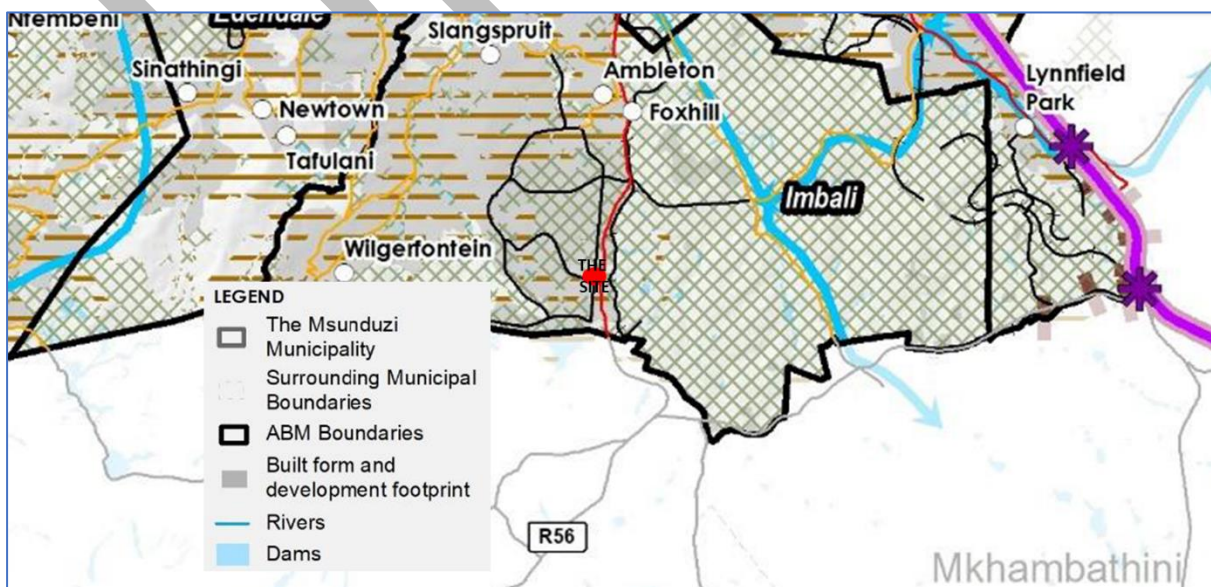
The Msunduzi Spatial Development Plan approved in 2022, provides some overall guidance to the development of the area along the R56 in which the site is located. The R56 which connects Thornville and Pietermaritzburg is, according to the SDF (page 97), earmarked as a primary corridor. Thornville is identified by the Richmond Municipality as relatively low order a community development node and as an area of agri-business and commercial development potential. The Msunduzi SDF identifies an emerging node 2 km south of the site as indicated in the figure below. The SDF also makes provision for a “build form and development footprint on the site and immediate surroundings (Figure 9).

Figure 8: Extract from the Msunduzi SDF, 2022



Source, Msunduzi SDF, 2022.

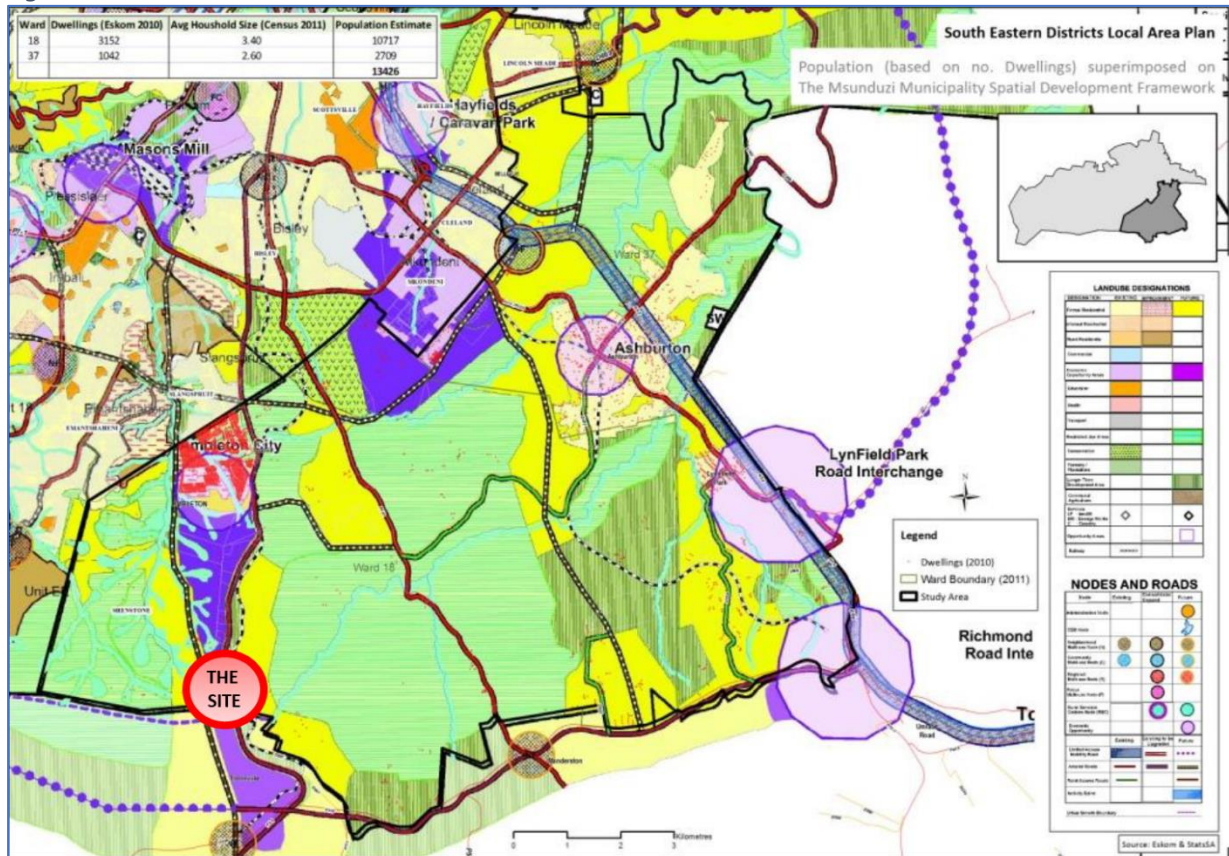
Figure 9: Development potential of the site



Source, Msunduzi SDF, 2022.

The 2014 South-eastern Local Development Plan shown in Figure 10 provides more detail of the development potential of the area of the site. In this plan the proposed development falls within a area of existing settlement and infill / consolidation with a broad land-use development typology called “residential” as opposed to industrial development (Figure 5-3 in the SEDLAP).

Figure 10: Msunduzi South-eastern Districts Local Area Plan



Source: Msunduzi South-eastern Districts Local Area Plan, 2014

In terms of the SEDLAP the Richmond Road area offers some potential to service passing trade and surrounding communities on an incremental development path. Demand exists for informal economic activities; particularly along higher intensity use areas and close to denser settlements. Economic activities are likely to primarily serve needs of the district and surrounding district as well as the Province of KZN. The potential does exist to attract one or two national market-oriented activities.

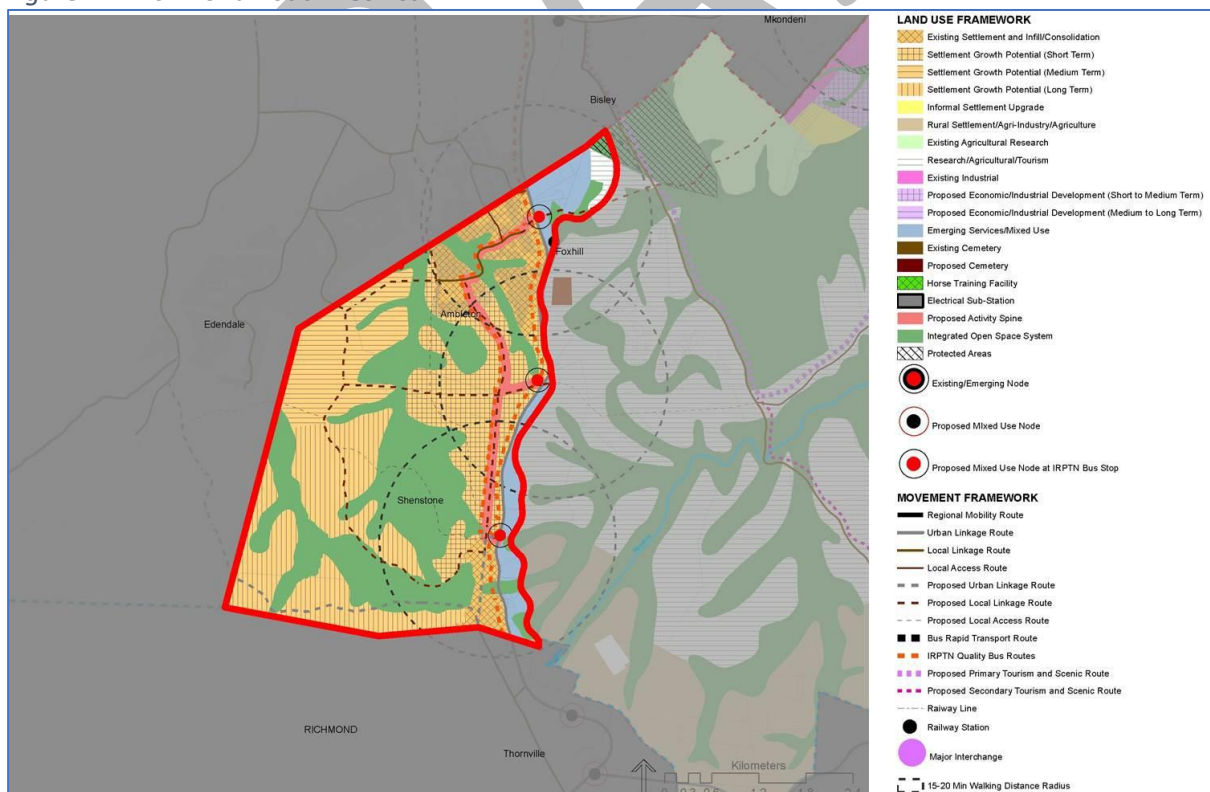
The categories of demand offer medium to lower intensity employment potential. The area is unlikely to offer parcels of land at the scale or serviced by a level of infrastructure to enable higher order employment demand. Skills categories are likely to be an even split between mid to lower skilled workers. Residential development is likely to support some construction employment demand and lower skill employment demand for domestic and retail type employment. In the short to medium term employment is likely to go primarily to those living outside the SED area.

The scale and pace of development in the area is likely to have a modest poverty reduction impact over a five-to-ten-year period as some employment is generated and as infrastructure, economic opportunities and accessibility improve across the area.

The SED area will need to accommodate a variety of lifestyle options through the establishment of both urban and suburban settlement types. These types include detached housing, semi-detached housing, row housing (terrace), duplex complexes and medium-rise buildings including 3-4 storey walk ups that can be accommodated by/provided by both public and private sector housing. Mono-functional housing “estates” that obviate integration and regional mobility should be avoided. Land uses that can associate with and be mixed with residential uses such as home business, community facilities, local neighbourhood shopping, etc. should be encouraged and facilitated. The neighbourhoods along the Richmond Road corridor requires infill development and the intensification of residential development, particularly in the vicinity of public transport nodes.

Urban/residential settlement areas will also need to accommodate a range of supporting social and economic uses for them to perform as integrated human settlements. This will include social facilities, local commercial services, recreational facilities, and amenity areas to serve local communities and residents. These supporting uses will need to be appropriately located to serve the residential thresholds. Higher order social and commercial facilities should be in urban mixed-use nodes and more local facilities located in neighbourhood nodes.

Figure 11: Richmond Road Precinct



Source: Msunduzi South-eastern Districts Local Area Plan, 2014

The SEDLAP makes provision for local and sub-regional mixed use/ economic development along Richmond Road corridor and within activity nodes. There is potential for this to develop into an important local activity spine within the precinct with economic potential due to the presence of the Richmond Road corridor, the access to growing residential thresholds (in Ambleton and Shenstone) and the availability of developable land (along and to the west of Richmond Road).

3.3 CONCLUSION

The context of the proposed development as shown in the preceding sections in terms of the site's macro and micro locations within the planning frameworks of the Msunduzi development support the proposed filling station and retail centre development. The proposed development fits the overall macro road network and the micro land-use development potential of the area.

DRAFT

4 PROFILE OF THE RECIPIENT COMMUNITY

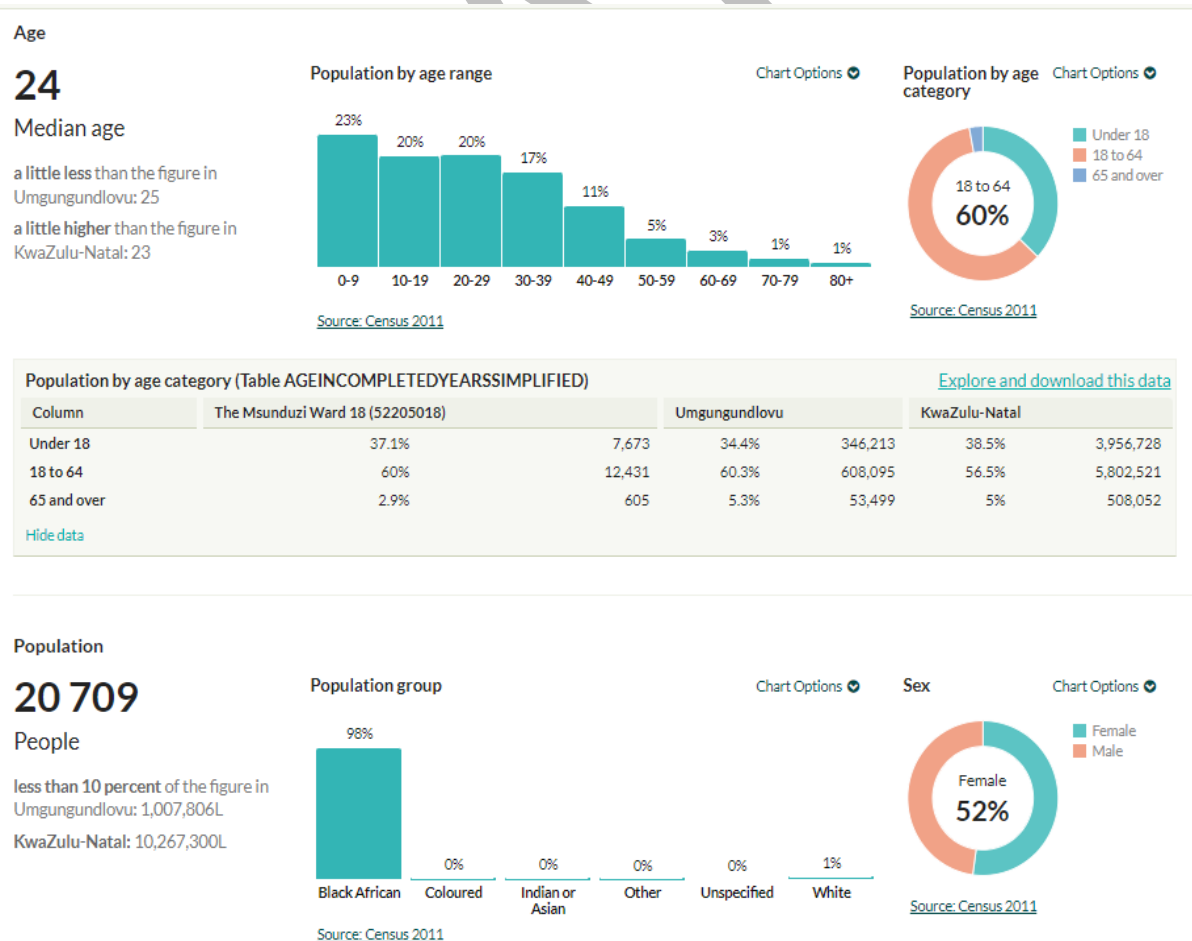
The proposed site is located within a residential area, which is a combination of formal and informal/rural areas. The surrounding suburbs to the north of the site include Westgate, Foxhill Embleton, Slangspruit, Shenstone and Thornville to the south.

The population density of the South-eastern district is relatively low and the population of the area accounts for only a small percentage of the total Msunduzi population. Most of the SED population is in the west in Ward 18 and most of this is within Ambleton. While the west accounts for the higher population figures, it is the least serviced and has the least development opportunity. The area has a young population with 70% of the population under 35 years of age.

To profile the recipient population the Msunduzi Ward 18 (52205018) will be used with:

- 20 709 Population
- 76.0 square kilometres
- 272.4 people per square kilometre

Figure 12: Socio-economic profile of Ward 18



Existing settlement is predominantly located on the peripheries of the SED area, including the residential areas Ambleton and Shenstone areas to the west. There is little by way of service and infrastructure in the central area with mostly open land and some ad-hoc rural settlement patterns. Residential expansion pressure is being experienced in the area. The SED area has a significant role to play in economic and spatial transformation in Msunduzi, in terms of the economic opportunity points and residential areas identified along the R56. This economic and residential expansion provides an opportunity to redress the spatial imbalances of the past.

Households

6 133

Households

less than 10 percent of the figure in Umgungundlovu: 280,485L

KwaZulu-Natal: 2,634,122L

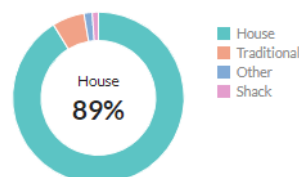
1.1%

Households that are informal dwellings (shacks)

about one-fifth of the rate in Umgungundlovu: 6.56%

less than a fifth of the rate in KwaZulu-Natal: 8.03%

Households by type of dwelling Chart Options



Source: Census 2011

Household ownership

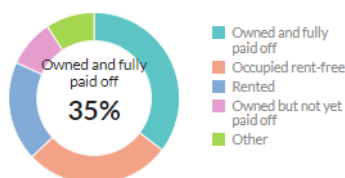
44.4%

Households fully owned or being paid off

about 90 percent of the rate in Umgungundlovu: 50.97%

about 80 percent of the rate in KwaZulu-Natal: 53.1%

Households by ownership Chart Options



Source: Census 2011

Annual household income

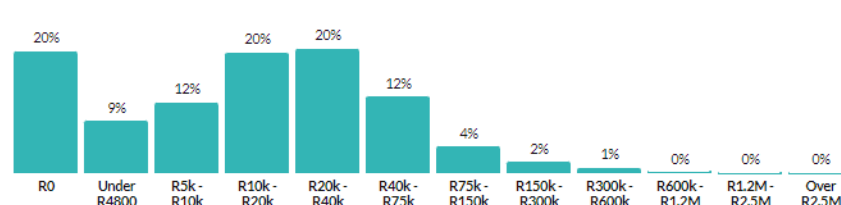
R14 600

Average annual household income

about half the amount in Umgungundlovu: R29 400

about half the amount in KwaZulu-Natal: R29 400

Annual household income Chart Options

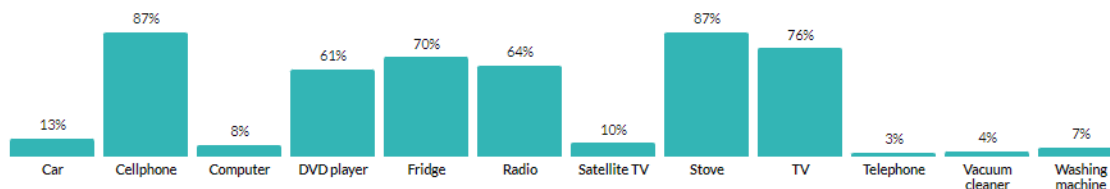


Source: Census 2011

Household goods

Goods available by household

Chart Options



Source: Census 2011

Table 1: The Msunduzi Ward 18 Annual household income

Column	The Msunduzi Ward 18		uMgungundlovu		KwaZulu-Natal	
R0	19.90%	1,218	14.60%	40,919	15.60%	410,484
Under R4800	8.50%	523	4.40%	12,409	5%	131,229
R5k - R10k	11.60%	709	7.20%	20,233	8.50%	225,014
R10k - R20k	19.60%	1,204	20.30%	57,040	19.50%	514,686
R20k - R40k	20.20%	1,242	19.10%	53,694	19.60%	517,141
R40k - R75k	12.40%	762	12.20%	34,115	11.80%	310,029
R75k - R150k	4.40%	268	8.60%	24,238	8.20%	216,654
R150k - R300k	1.90%	117	6.90%	19,297	6.20%	161,976
R300k - R600k	1%	58	4.50%	12,688	3.80%	100,013
R600k - R1.2M	0.20%	15	1.40%	3,986	1.20%	31,254
R1.2M - R2.5M	0.20%	12	0.40%	1,070	0.40%	9,400
Over R2.5M	0.10%	7	0.30%	784	0.20%	6,133

Source: StatsSA, Accessed December 2022

Table 2: The Msunduzi Ward 18 Goods available to household

Column	The Msunduzi Ward 18		uMgungundlovu		KwaZulu-Natal	
Car	13.4%	819	27.9%	78,295	24.4%	642,848
Cellphone	87.4%	5,365	86.1%	241,814	87%	2,291,879
Computer	8.4%	514	18.9%	53,138	16.1%	425,113
DVD player	61.1%	3,752	57.6%	161,778	52.4%	1,380,914
Fridge	69.9%	4,291	66.2%	185,716	61.5%	1,621,934
Radio	64.1%	3,935	68.2%	191,468	67.6%	1,780,814
Satellite TV	9.9%	605	23.9%	67,091	22.1%	581,945
Stove	87.2%	5,354	75.6%	212,260	70.3%	1,852,947
TV	76.3%	4,680	71.2%	199,884	66.2%	1,743,642
Telephone	3.5%	214	17.6%	49,309	15.8%	415,793
Vacuum cleaner	4.4%	270	15.8%	44,332	12.7%	333,591
Washing machine	7.1%	434	22.8%	63,870	19%	499,683

Source: StatsSA, Accessed December 2022

There are no existing shopping centres in the area. The residents travel to the Southgate Spar, Edendale, Scottsville and the CBD to do shopping. There is also an existing railway line within proximity to the site. Three tourism products (accommodation) were identified in the area such as the Yellow house (Foxhill farm), Game Facing Lodge and Little Elba accommodation facilities that could be identified through desktop research. Towards the Eastern boundary of the site there is Intaba Ridge estate which is a private Game Estate.

Areas like Ambleton are in severe need of basic amenities and facilities that will help improve the day-to-day quality of life of residents. Shenstone and Ambleton represent areas of dire need for socio-economic opportunity, connectivity and public realm upgrades. These areas also require greater

exposure in terms of access and linkage. The Shenstone area presents opportunity for strategic 'greenfields' development that will unlock economic opportunity in the area.

The proposed development presents an opportunity to improve the quality of life for the residents of the area. The closest shopping area is at the Southgate Super Spar approximately 10 km to the north. By creating employment opportunities and attracting future investment into to the area which could be beneficial to the community.

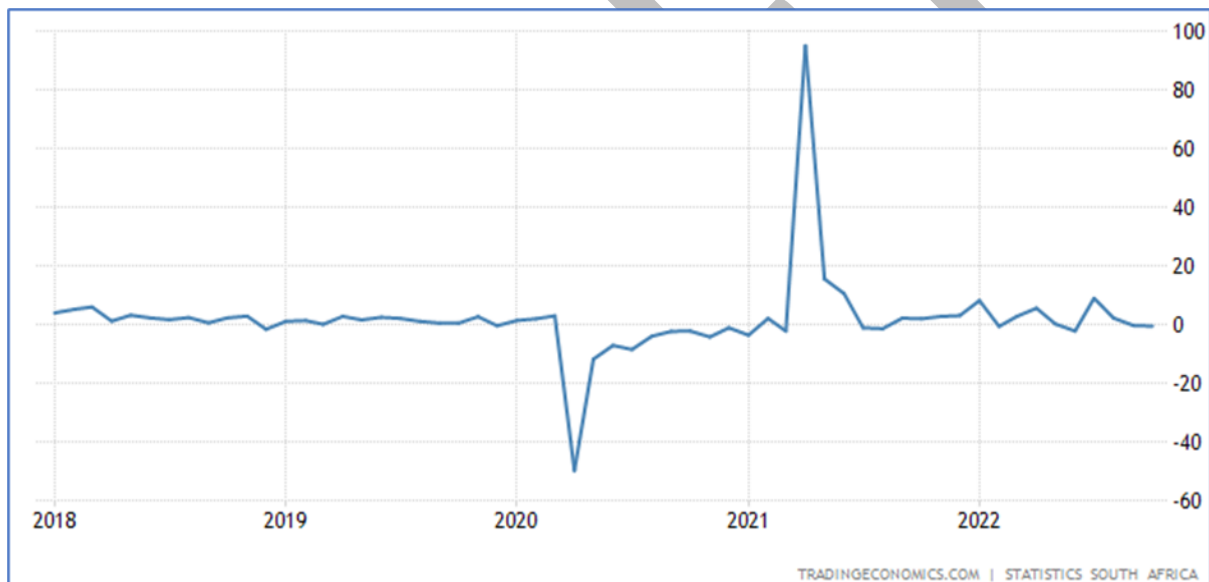
DRAFT

5 FEASIBILITY OF THE PROPOSED RETAIL CENTRE

5.1 INTRODUCTION: RETAIL TRENDS IN 2022/23

Retail Sales percentage change year-on-year in South Africa averaged 3.96 percent from 2003 until 2022, reaching an all-time high of 95.10 percent in April of 2021 based on the record low of -49.90 percent of 2020 during the Covid-19 period. Retail trade was down by 0.6% from a year earlier in October of 2022, following a downwardly revised 0.4% decrease in the previous month and compared with market forecasts of a 0.5% fall. It was the second consecutive month of contraction in retail activity and at the quickest pace since June. The largest declines in sales were recorded for hardware, paint and glass (-4.8% vs -7.2% in October); pharmaceuticals and medical goods, cosmetics and toiletries (-3.4% vs -4.8%) and food, beverages and tobacco (-2.3% vs -8.1%). On a monthly basis, retail trade rose by 0.4% in October, after an upwardly revised 0.2% increase in the previous month. source: Statistics South Africa

Figure 13: Retail sales % changes year-on-year, 2018 to 2022



Source: Trading Economics, accessed January 2023

The ten most important retail trends to follow in 2023 are.

- Ecommerce is here to stay.
- Safety is important to consumers.
- Self-service checkout options.
- Chatbots are the newest team members.
- In-store appointment booking.
- 24/7 customer service.
- Omnichannel shopping.
- Transparency in shipping.

Negative annual growth rates were recorded for:

- Retailers in hardware, paint and glass (-8.6%);
- General dealers (-5.7%); and
- Retailers in pharmaceuticals and medical goods, cosmetics and toiletries (-4.3%).

The largest negative contributors to this decrease were:

- General dealers (contributing -2.8 percentage points); and
- Retailers in hardware, paint and glass (contributing -0.7 of a percentage point).
- The largest positive contributor was retailers in textiles, clothing, footwear and leather goods, contributing 0.8 of a percentage point, said StatsSA.

Retail trade sales increased by 0.5% in the second quarter of 2022 compared with the second quarter of 2021. The largest positive contributor to this increase was retailers in textiles, clothing, footwear and leather goods at 3.4%, contributing 0.6 of a percentage point.

John Loos, property sector strategist at FNB Commercial Property Finance, noted that real (inflation-adjusted) retail sales growth for June was weaker than the previous month's +0.1% growth. "This means that the quarterly year-on-year growth rate has slowed from +2.8% in the first quarter of 2022 to 0.5% in the second quarter. The slow growth in real retail sales reflects a recent acceleration in retail price inflation, most notably – but not only – in the specialised food, beverage and tobacco category (7.6%) of retailers as well as in the general dealer's category (7%), the latter retail category where much of the general food and grocery retail is found. A global and domestic food price inflation surge has been a key driver.

Those shopping centres that focused more on basic necessities such as food and groceries are not performing as well as anticipated. The general dealer category of StatsSA retail data, along with health care and pharmaceuticals retail, felt some sales pressure in 2022. However, it is still expected that these categories of retail will prove to be more insulated against the recent increased consumer financial pressures, possibly remaining more stable than those centres more focused on non-essential purchases such as entertainment and eating out, luxury goods, and postpone-able expenditure items. Postponeable expenditures are often found in areas such as clothing and footwear, furniture and household appliances, or hardware, paint, and glass products for home maintenance.

Larger regional centre categories may ultimately be at a relative disadvantage compared to many neighbourhood and convenience centres. This is because they do often have a greater focus on clothing and footwear, fashion, and entertainment of various types along with household furniture and appliances retail, all of which can be quite cyclical and experience pressure in tougher times. The major clothing, textiles and footwear retail category had recovered following the hard lockdowns of 2020, and at June 2022 was still 6.8% above the pre-lockdown level of June 2019 as households played catchup on clothing and footwear spend following the lockdown period.

FNB said that properties with a key focus on the hardware, paint and glass retail category face pressure following a major real decline of 8.6% year-on-year in June. These expenditure items, often related to home maintenance, can often be postponed in times of increased financial pressure, and this appears to be what is happening.

Former township and rural centres outperformed others in many cases during the lockdown period, their essential retail having avoided lockdown measures to a greater extent. But they now have the challenge of keeping the basic items affordable in an environment where food price inflation may be outstripping income growth.

5.2 HIERARCHY OF RETAIL CENTRE DEVELOPMENT

The table overleaf provides the general classifications of shopping centres as per the Planning Guidelines for Retail Facilities in KwaZulu- Natal. While the local market area satisfies the criteria in terms of households and population for a 'Small/free-standing and Convenience Centre', considering that there is very limited competition in the immediate surrounding area and the rural nature of the area, a 'Rural Retail development' may be more suitable. Using the dominant LSM level of between 1 – 5 for the local market area, while the characteristics of the proposed centre in terms of size and classification is congruent with a convenience centre, the local community needs vary and are not strictly convenience.

The Planning Guidelines for Retail Facilities in KwaZulu-Natal indicates that for rural retail development, these centres are in most cases built according to the profile and needs of the local residents. This type of development depends on the location, the total number of people in the broader catchment area, transport to the node, the level of competition, the existing facilities and the income of households. The tenant mix of these centres according to the Planning Guidelines would comprise of food, clothing, furniture and services.

Table 3: Typologies of retail centres

Type of Centre	Size of Centre (m2)	Access requirements	No of households	Socio-economic groups	Radius	Travel time	Main tenants
Rural Retail Development	5000-30000	Close to main community and taxi facility	20 000-210 000	Mainly LSM 1-5	Wide, up to 80km	Up to 45 mins	Depends on size, needs to focus on the needs of the surrounding community
Small free-standing centre	500-1000 5- 25 stores	Suburban street	LSM 1-5, (<10 000) LSM 6-9, (<4 500) LSM 10-10+, (<2 000)	All LSM groups	1	<2	Café/superette, few convenience stores
Neighbourhood centre	5000-12000 25-50 stores	Major collector roads – traffic impact study required	LSM 1-5 (20 000- 47 000) LSM 6-9, (9 000 - 20 100) LSM 10-10+, (3 700- 8 600)	LSM 4-10	2	4	Supermarket, convenience some small specialised stores
Community Centre	12000-25000 50 - 100 stores	Main Road – traffic study impact required	LSM 1-5, (44 000 - 130 000) LSM 6-9, (20 000- 46 000) LSM 10 -10+, (8 000- 19 000)	LSM 4-10	3	6	large supermarket convenience small national clothing restaurant and take away Services
Small regional	25000-50000 75-150 stores	Main road – traffic impact study	17800-35700	All	5,0	10	large supermarket 1 or 2 large clothing nationals boutique restaurant and take away, entertainment Service
Regional centre	50000-100000 150-250 stores	Main road and access from a national road can only be allowed with the consent of the national roads authority	LSM 1-5, (180 000 - 420 000) LSM 6-9, (80 000 - 185 000) LSM 10 -10+, (33 000-76 000)	Mainly above average	8,0	16	large supermarket/hyper 2 or more large clothing small clothing and boutiques Entertainment restaurants Services Convenience

5.3 COMPETING RETAIL CENTRES

5.3.1 Shopping centres in Pietermaritzburg

There are currently no shopping centres in the vicinity of the site. A list of all the shopping centres in Pietermaritzburg are provided below with detail information of those most important to this project.

The three key centres of importance as competitors to the project are:

- The Mall at Scottsville Scottsville
- Woodburn Shopping Centre Scottsville
- Super Spar Southgate Southgate.

Table 4: Shopping Centres in Pietermaritzburg – highlights show centres closest related to the study area

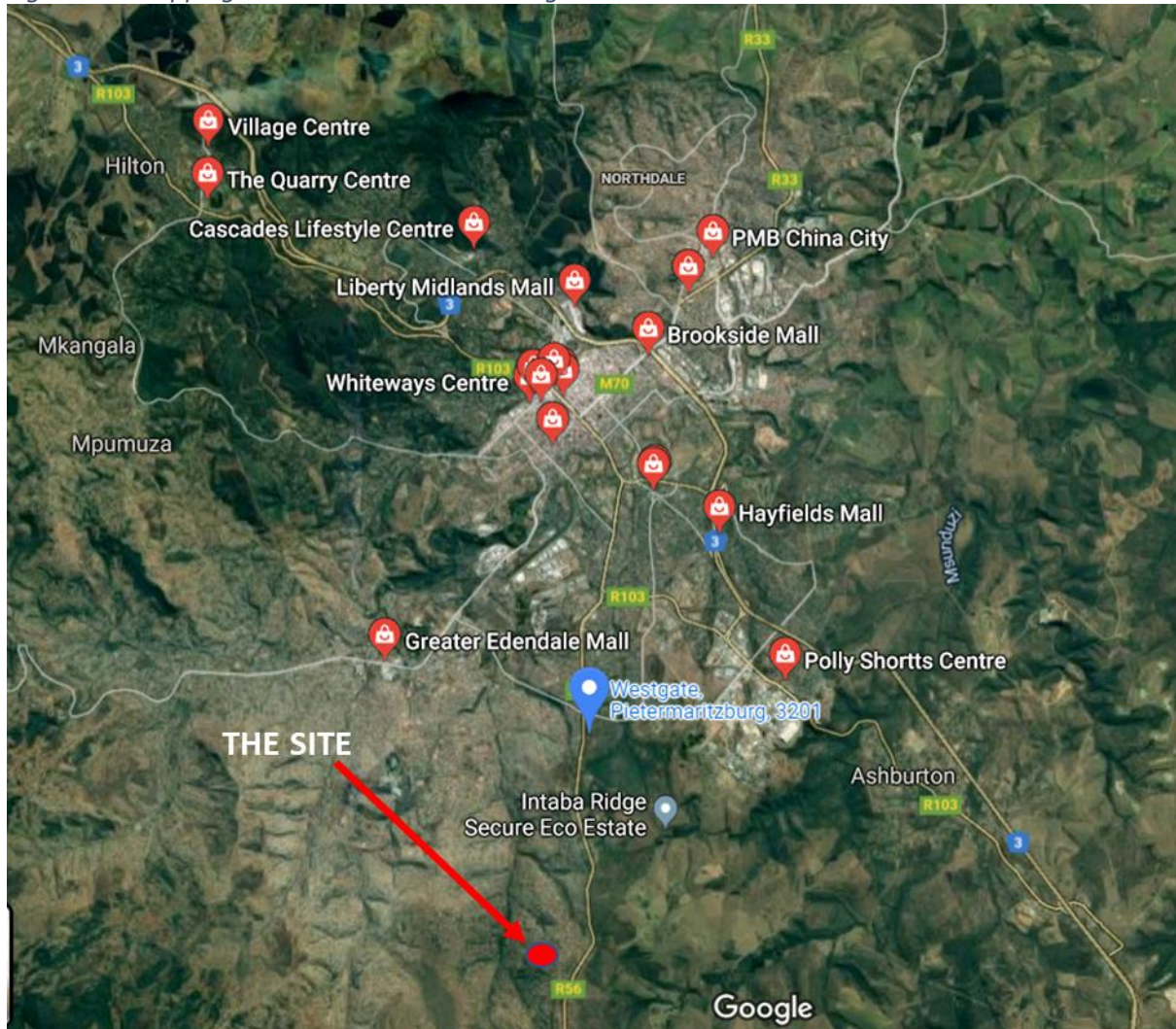
Shopping centre	Location	Distance from the site
The Mall at Scottsville	Scottsville	11.5 km
Woodburn Shopping Centre	Scottsville	11 km
Super Spar Southgate	Southgate	8.6 km
Greater Edendale Mall	Edendale	9.9 km
Hayfields Mall	Hayfields	11.7 km
Liberty Midlands Mall	Chase Valley	15 km
Athlone Circle Mall	Athlone	More than 10 km
Brookside Mall	CBD	More than 10 km
Capital Centre	CBD	More than 10 km
Cascades Lifestyle Centre	Chase Valley Downs	More than 10 km
Edendale Crossing Shopping Centre	Edendale	More than 10 km
Kwamabulala Shopping Centre	Dambuza, Edendale	More than 10 km
Northway Mall	Woodlands	More than 10 km
Parklane Shopping Centre	CBD	More than 10 km
Selgro Centre	CBD	More than 10 km
Victoria Square	CBD	More than 10 km

The existing malls are approximately 8 to 10 km away from the proposed site. The residents commuting by public transport, must take two taxis to get the destinations as there is no direct taxis going to these malls from the area.

There are few existing spaza/ tuck shops in the area. A total of six tuckshop were identified within the vicinity of the site. The closest identified supermarket is Southgate Spar centre which is located more than 5km away from the proposed site. This is where the community of Fox hill and surrounding areas do their shopping mainly because it's the most convenient for the community and a single taxi used as opposed to others. Further down the road on R56 road towards the CBD there is an existing

convenient store called Pietermaritzburg Supermarket serving mainly the passing traffic and the Pelham Community.

Figure 14: Shopping Centres in Pietermaritzburg



5.3.2 Competitor profiles

The table below summarises the features of existing retail in Southgate and Greater Edendale Mall. Pietermaritzburg supermarket, Ok Mini Mark and Scottsville Mall.

SOUTHGATE SUPER SPAR



Name	Distance from Site	Size/Classification	Tenants/Description	Parking Bays
Southgate Spar	5 km	Small free-standing Centre	Spar, Tops, Build it, Pharmacy, ATM, Butchery, Coffee shop and Total service station and Car wash	Open parking bays

ALEX SUPER MARKET



Name	Distance from Site	Size/Classification	Tenants/Description	Parking Bays
Alex Supermarket	6 km	Small free-standing Centre	Alex Supermarket, Msunduzi Daynite Pharmacy, Carwash, Offices,, Laundry services, Liquor store, Medicare surgery, and ATM services.	Open parking bays

OK MINI MARKET



Name	Distance from Site	Size/Classification	Tenants/Description	Rental and charges	Parking Bays
OK Mini Market	6.8km	Small free-standing Centre	Ok Mini Market and OK Liquor store, Absa ATM, A video Store, Laundromat	Open bays	parking

GREATER EDENDALE MALL



Name	Distance from Site	Size/Classification	Tenants/Description	Parking Bays
Greater Edendale Mall	8.1km	Small Regional	<p>Grocery stores: Pick n Pay and Pick n Pay Liquor, Shoprite and Shoprite Liquor store,</p> <p>Furniture and home stores: OK Furniture, Bradlows, Ellerines, Russel, sheet street etc. Pietermaritzburg local designers.</p> <p>Clothing and Cosmetic stores: Mr Price, PEP, Edgars, Identity, Jet, Ackermans, Legit, Clicks, Exact, Asmall, Truworths, JAM, fashion Express, etc.</p> <p>ATMs: FNB, Standard bank, Nedbank, ABSA, Capitec, Old Mutual, African Bank</p>	Open parking bays

- Other services offered: Computers & Audio/Visual
- Food & Drink (King Pie, McDonalds, Miguel's Bakery, Ribco)
- Furniture & Home
- Games & Entertainment
- Hardware
- Health & Beauty
- Jewellers
- Mobile & Computing
- Public Service
- Specialty
- Supermarket

SCOTTSVILLE MALL



Name	Distance from Site	Size/Classification	Tenants/Description	Parking bays
Scottsville Mall	8.2km	Neighbourhood Centre 26M	Checkers and checkers liquor. Food lovers ATMs and services: African Bank, ABSA, Nedbank, FNB, Capitec, Gym, Clothing and Beauty stores: Mr Price, Ackermans, The Fix Food: KFC, Debonair, Roco mamas, Tekkie Town, Crazy store. Bp Garages, Postlinks, Spur, Gym	Scottsville has both open and undercover parking bays

HAYFIELDS MALL



Name	Distance from Site	Size/Classification	Tenants/Description	Parking bays
Hayfield Mall	10km	Neighbourhood Centre	<p>ATM and Banks: Absa, FNB, Capitec, Standard bank, and Nedbank.</p> <p>Grocery Stores: Picknpay, Picknpay Liquors, Woolworths</p> <p>Other Stores: Wimpy, Curry pot, Sorbet Nail and Beauty Salon, Electronics & Cellular, Clicks, Babershop, Sole Base. Rocherster Tackle, Royal Smokers, Shoeperama, Laundry, Pep stores, Vison \$ Eyewear store, Books and Stationary shops, Pharmacy, Hardware store, Grace Jewellers</p>	Open parking bay

WOODBURN SQUARE, SCOTTSVILLE



Name	Distance from Site	Size/Classification	Tenants/Description	Parking bays
Woodburn Square, Scottsville	11.5 km	10,000 m2 Neighbourhood centre	Checkers Woolworths Dischem SpecSavers Mr Price Sports Pedros Wimpy Chicken Licken Telkom Pizza Hut Banking ATMs	More than 80

5.4 DEMAND FOR RETAIL SPACE

5.4.1 Introduction

It is recognised that this development may have specific aspects that make it somewhat unique from broad national and provincial trends, most important of which is that there are currently no formal retail offerings in this rapidly urbanizing area and the closest available shopping centre is approximately 5 km which comprises of one encore store, Super Spar and few convenient shops. This clearly indicate that the community have limited options when it comes variety of shops. They are required to travel 8 kms or more for other retail options and services such as clothing, furniture, household goods and banking services.

The retail demand model is developed to highlight the effective demand for durable goods (Furniture, household appliances, etc); semi-durable goods (clothing and footwear, household textiles, furnishings, glassware, etc., and other miscellaneous goods), non-durable goods (food, beverages and tobacco, household fuel and power, household consumer goods, recreational and entertainment goods) and services (miscellaneous services). This helps the developer of the retail centre to understand the current Gross Leasable Area (GLA) required for the above-mentioned categories of goods in the area.

The choice of the four categories (durable, semi-durable goods, non-durable goods and services) for the model is based on the fact that the proposed site is situated near residential areas, hence the majority of households reside in or around the area will demand such goods and services. It is expected that households in area will frequent the proposed retail centre (which is categorised as a neighbourhood centre) mainly for specific goods and services.

5.4.2 Effective retail demand expressed in gross leasable floor area (m²)

To determine the effective demand for the proposed centre, the following planning parameters are applied for the market catchment estimates:

- The households that are included in the market catchment area comprises of the primary market area which is 4009 and 961 for the secondary market. This includes the population of Fox hill and other surrounding areas.
- A growth rate parameter of 3% per annum is applied based on consumption expenditure and GDP growth trends in recent years.
- Approximately 55% of the primary Market area and 15% secondary market area population will visit the proposed shopping centre as others may choose alternative shopping centres.
- Transient traffic: Average annual daily traffic in one direction is 3 175 light vehicles. Based on the same household and expenditure profiles as the secondary market, and a catchment rate of 15%, the buying power from the passing traffic is calculated.

The following tables show the calculations used to derive to the demand model applied in this study. The table below details the primary and secondary market area subplaces projected 2022 population statistics based on the 2011 Census data. The projected population figures are used to calculate the population and household net effective demand.

Table 5: Population and households within the market catchment area

Primary Market: Subplace	% of Households in Market Area	Population 2022	Household 2022
Westgate	30%	3,787	1,060
Slangspruit	30%	3,180	968
Ambleton	30%	4,833	1,484
Foxhill	30%	1,274	497
TOTAL		13,074	4009
Secondary Market: Subplace		Population 2022	Household 2022
Westgate (70% portion)	10%	884	247
Slangspruit	10%	1,060	323
Edendale SP Q	10%	821	229
Edendale SP P	10%	278	72
Hezelmere	10%	57	15
Richmond Crest	10%	67	16
Ridge Park	10%	124	30
Thornville	10%	60	29
TOTAL		3,351	961

2022	Weighted average monthly household income at 5% annual CPI growth	R 9452
-------------	--	---------------

The following table details the net effective gross leasable area (GLA) demand as per demand and supply totals derived above.

Current projected demand for the proposed neighbourhood centre is for 3 385 m² in 2022 and to grow to 5 884 m² in 2025 and 6 822 m² in 2030. There is sufficient demand to support a neighbourhood centre within the development.

The proposed development will have no significant impact on the other competing retail centres as their demand markets are dispersed throughout Pietermaritzburg and do not rely solely on the catchment market of the proposed centre.

Table 6: Effective demand for retail development within the market area

Effective Demand for Retail on the Proposed Site	Primary Market	Secondary Market	Transient traffic	TOTAL 2022	TOTAL 2025	TOTAL 2030
	2022	2022	2022	2022	2025	2030
Household population (Number)	4,009	961	318	4,970	5,431	6,698
Average Monthly Household Income / transient disposable income in Rand pm 2022	9,452	9,452	473	9,482	9,482	9,482
Average Annual Household Income (Million Rand)	455	109	540	1,104	1,206	1,398
Percentage of Income used for Expenditure	90	90	100			
Total Household Expenditure per Annum (Rand Million)	409	98	540	1,048	1,145	1,327
Percentage retail spent	56	56	100			
Buying power Total Retail Expenditure per annum (Rand Million)	229	55	540	824	901	1,044
Market Catchment Potential (%)	55	15	20	49	49	46
Total Potential Retail Expenditure per annum (Rand Million)	126	8	108	242	265	307
Trading Density (Rand per m2 pa)	45,000	45,000	45,000			
Total Effective Demand m2	2,801	183	2,401	5,385	5,884	6,822

5.5 CONCLUSION

The main features of the assessment are:

- A household population of 5000 people is included in the market catchment area that comprise the population of Foxhill and other surrounding areas.
- This area is rural in nature transforming rapidly into an urbanised area with limited existing shopping facilities. The main competitor for the proposed development is Southgate Spar.
- The proposed retail centre is close to a residential area and well connected to road networks. This makes the proposed shopping centre ideally situated to capture the local, surrounding market and transient market.

- The assessment indicated a need for new shopping facilities in the area, as there are no current facilities to meet the growing local demand in the area, as a result of rapid urbanization in the area.
- It is recognised that this development may have specific aspects that make it somewhat unique from broad national and provincial trends, most important of which is that there are currently no formal retail offerings in this rapidly urbanizing area and the closest available shopping centre is more than 8 km away which comprises of one anchor store, Spar, and convenient shops. This indicates that the community have limited options when it comes variety of shops. They are required to travel more than 8 kms for other retail options and services such as clothing, furniture, household goods and banking services.
- The market demand assessment shows sufficient demand exists within the market catchment area to sustain the proposed retail development.

In conclusion, the assessment indicates that there is market demand in the catchment area of the proposed retail centre of:

Effective Demand for Retail on the Proposed Site	TOTAL GLA 2022	TOTAL GLA 2025	TOTAL GLA 2030
	2022	2025	2030
Total Effective Demand m2	5,385	5,884	6,822

6 FEASIBILITY OF THE PROPOSED FUEL SERVICE STATION

6.1 FILLING STATIONS IN THE MARKET AREA

The site is located along the R56 and is easily visible and accessible from the main road. The site is at a junction where several rural collector roads join into the R56. Thus, the site is well located from a commercial market point of view and will be able to serve the local community and the passing traffic. It has been shown that the population in the area is rapidly growing with new residential developments and other supporting services. Due to the influx of people into the area and the growing traffic volumes, it is expected that the demand for fuel in the area will also increase. The current supply of petrol filling stations is limited to one station at Thornville (2.5 km away) which is located off the R56 and therefore services the local agricultural market more than the passing Richmond to Pietermaritzburg market. There is also a Total station located at Southgate, but that is more about 11 km from the site.

The proposed petrol filling station is strategically located to provide services to both the community and the transient traffic on R56 road. Heavy vehicles traveling to or from Pietermaritzburg industrial areas and light motor vehicles traveling to or from the Pietermaritzburg to Richmond, all the way to the Eastern Cape that use this route will be the target market of the petrol filling station. The proposed petrol filling station has no direct competition, the only petrol filling station that is likely to experience diffused market impact is Total Garage at Southgate Spar. The figure overleaf shows the most important fuel filling stations in Pietermaritzburg and the two that are currently serving the area.

Neither the Thornville nor the Southgate stations will be significantly impacted by, or will impact on, the proposed station. The Southgate filling station is not reliant on the traffic on the R56 for its market sales. The Southgate station serves a large local residential population in the suburbs of The Grange, the eastern parts of Imbali, Westgate, Slangspruit, Ambleton and Foxhill. The Thornville station is a small one serving mainly the local agricultural market of Thornville.

Figure 15: Fuel filling stations in the area of the site (NOTE THAT THE SCALE ON THE MAPS ARE DIFFERENT)

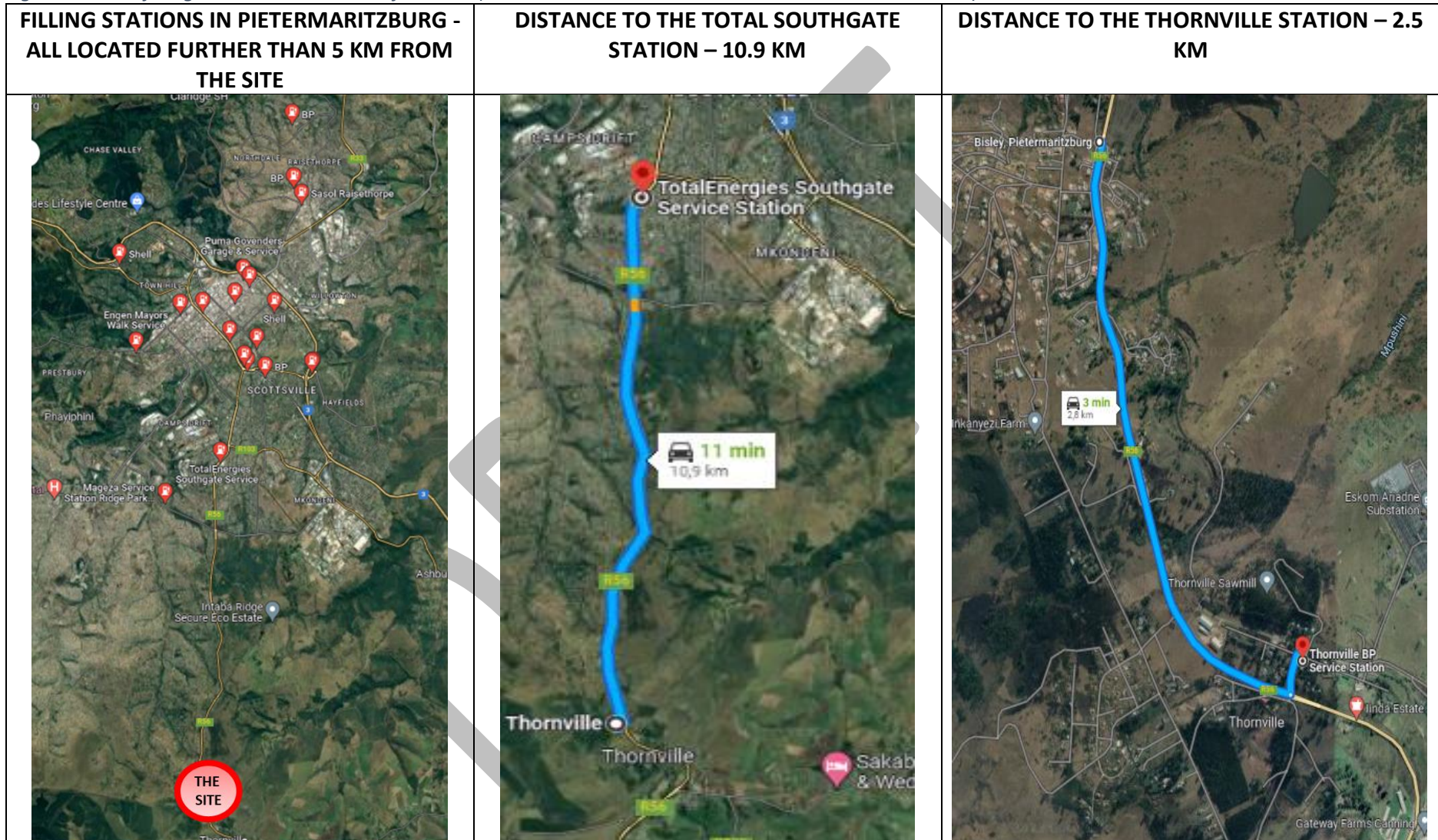


Table 6: Competing Petrol Filling Station Supply -Total South Gate Spar (Sasol)

TOTAL GARAGE SOUTHGATE SPAR



Number of Pump Islands	6
Convenience Retail Centre	Yes (including a small bakery)
Restaurant/Take-Away	Yes (Mugg and Bean)
Operating hours	24hrs
Ablution facilities	yes
Car Service Station	No
ATM	Yes
Truck stop facility	No
Car Spares Store	No
Other facilities	Yes (car wash)
Total Pumping Volume	Could not be determined

THORNVILLE BP SERVICE STATION



The Thornville Service station is a very localised station off the R56 and services the local community market. It is a “rural” station with two pumps one for diesel and one for petrol. A Capitec ATM and general store is located at the site. The proposed fuel station will not be serving the same market as the Thornville station and therefore the impact of the new proposed station are limited.

6.2 DEMAND FOR A NEW FILLING STATIONS

The demand for fuel at the site is determined by taking account of the traffic flows past the site, the average inception rate and the average fill per vehicle type. The traffic count was taken at the site where it is located next to the R56 on 11 November 2022.

Table 7: Traffic count for 12 hours on Friday 11 November 2022

Approach to the site on the R56 from	Car	Taxi	Heavy	Bus	TOTAL
North	2822	366	258	8	3454
South	2313	310	284	7	2914
East	10	0	1	0	11
West	361	59	17	0	437
TOTAL for 12 hours	5506	735	560	15	6816
TOTAL FOR 24 HOURS					7,838

Source: Traffic Count, 11 November 2022.

The following table shows the demand for fuel for the proposed filling station. The suggested inception rate by the Department is 4%. Three scenarios of inception rates are tested in the table below.

Table 8: Fuel demand based on traffic flows and inception scenarios – excluding busses

Market Variables	Total Vehicles			
12 hour total vehicles	6,816			
24 hour total vehicles	7,838			
	Light Vehicles	Taxis	Bus	Heavy Vehicles
Percentage split	80.8%	10.8%	0.0%	8.2%
Interception Rate: Minimum Parameter	3%			
	Light Vehicles	Taxis	Bus	Heavy Vehicles
Number of vehicles	190	25	0	19
Average fill (litres/vehicles)	30	60	75	100
Fuel litres/day	5,699	1,521	0	1,932
Fuel litres/month (30 days)	170,961	45,644	0	57,960
Total litres/month	274,565			
Interception Rate: Medium Parameter	4%			
	Light Vehicles	Taxis	Bus	Heavy Vehicles
Number of vehicles	253	34	0	26
Average fill (litres/vehicles)	30	60	75	100
Fuel litres/day	7,598	2,029	0	2,576
Fuel litres/month (30 days)	227,948	60,858	0	77,280
Total litres/month	366,086			
Interception Rate: Maximum Parameter	5%			
	Light Vehicles	Taxis	Bus	Heavy Vehicles
Number of vehicles	317	42	0	32
Average fill (litres/vehicles)	30	60	75	100
Fuel litres/day	9,498	2,536	0	3,220
Fuel litres/month (30 days)	284,936	76,073	0	96,600
Total litres/month	457,608			

Source: SRR Calculation based on traffic counts and inception scenarios

Based on the traffic and demand model above the proposed filling station will attract a demand of 366,086 lt per month on average. The industry standard is that a station that can pump more than 300 000 lt per month is viable. It follows that the proposed station will be viable.

Since there are no filling stations that is in direct competition with the proposed station, the impact of the proposed station on the other stations, and of those stations on this one, will be minimal.

6.3 MARKET TRENDS

Some of the important recent market trends that the developer must take into account in the development of the proposed filling station are the change in vehicle sales and registrations, the price volatility of fuel sales in the country and, the future growth of electric vehicles.

6.3.1 New vehicle sales and registrations in South Africa

Total Vehicle Sales in South Africa averaged 40185.10 Units from 1994 until 2022, reaching an all-time high of 65689.00 Units in August of 2006 and a record low of 574.00 Units in April of 2020. This graph provides the latest reported value for - South Africa Total Vehicle Sales - plus previous releases, historical high and low, short-term forecast and long-term prediction, economic calendar, survey consensus and news. Car Registrations in South Africa averaged 20821.69 from 1960 until 2022, reaching an all-time high of 43659.00 in August of 2006 and a record low of 105.00 in April of 2020.

The information indicates that there is a long-term growth in the number of new vehicle sales and registrations in the county. More vehicles require more fuel demand and sales. This is especially true for the Leliesfontein market area where there is an increase in population growth and a transformation from a rural to urban development taking place.

Figure 16: Total new vehicle sales in South Africa, 2000 to 2022



Figure 17: Car registrations in South Africa, 2000 to 2022



6.3.2 Price volatility in the retail fuel market

There has been a general long-term increase in the price of fuel in South Africa since 2000 as shown in the figure below (expressed in USD per litre). Since 2013 the price has fluctuated significantly as global economic uncertainty increased and exchange rates changed.

Figure 18: The price volatility of fuel prices in South Africa, USD per litre



6.3.3 Electric vehicles (EV)

SA is seeing a slow but steady growth of Electric vehicle (EV) adoption compared to the rest of the globe, reaching a total of 1 559 EV units sold at the beginning of 2022 which is less than 3% of total market sales. While SA is leading other African countries in EV adoption, in comparison to other emerging markets like India and Mexico, the country is falling behind. Electric cars, and plug-in hybrids, may account for 20% of the new car sales in South Africa by 2030. As a percentage of the total vehicle pool of cars it will still be small. The uniqueness of the domestic car manufacturing industry, the sprawling nature of the country's cities, the cost of EV and, policy uncertainty remain key stumbling blocks to this sector taking off¹.

Unpacking the 2022 AutoTrader Electric Vehicle Buyers Survey (3rd edition) reveals a slight shift in sentiment around owning an EV in the future, with the initial cost of purchase considered to be the EVs biggest disadvantage. EVs in South Africa have the added disadvantage of incurring substantial taxes. Internal combustion engine (ICE) imports incur 18% versus EV imports of 25%, which pushes the cost of an EV to two times that of the average price of a conventional new vehicle of a similar make/model. The initial cost of purchase has become an even bigger disadvantage to consumers. The early adoption of EVs is decreasing and data shows that consumers are pushing out their purchase intent and almost taking a wait-and-see approach. Although EV ownership will likely grow in future it

¹ University of Cape Town (UCT) researcher Andrew Grant, 2014

does not appear that it will be a dominant influencer in the South African fuel demand market till late in the 2030s.

6.4 CONCLUSION: NETT EFFECTIVE DEMAND

The total fuel demand is estimated to be above 300 000 litres of per month. This exceeds 300 000 litres normally used as a measure of the feasibility of fuel stations. As such, the proposed filling station will be feasible.

Neither the Thornville nor the Southgate stations will be significantly impacted by, or will impact on, the proposed station. The Southgate filling station is not reliant on the traffic on the R56 for its market sales. The Southgate station serves a large local residential population in the suburbs of The Grange, the eastern parts of Imbali, Westgate, Slangspruit, Ambleton and Foxhill. The Thornville station is a small one serving mainly the local agricultural market of Thornville.

DRAFT

7 SOCIO-ECONOMIC IMPACT OF THE PROPOSED DEVELOPMENT

7.1 ECONOMIC IMPACT OF THE PROPOSED DEVELOPMENT

7.1.1 Economic and employment impacts

The total capital investment of the proposed development is estimated to be R 60 million for the shopping centre and the petrol filling station. Employment at the shopping centre and the filling station is likely to generate about 350 full time jobs and 100 part time jobs².

Based on the above direct impacts, and using the National Input Output Model³, it is assessed that the direct and indirect impacts of the construction phase of the project are likely to be as shown in the table below. The table shows that the Full Time Equivalent (FTE) employment that will be created for the duration of the construction period is 340 positions.

Table 9: Total direct and indirect economic impacts of the proposed development

IMPACT OF THE CAPEX	Direct	Indirect	Induced	Total
IMPACT: PRODUCTION RAND	60,000,000	104,778,418	79,513,324	244,291,742
IMPACT: GDP RAND	17,149,049	29,947,504	22,726,299	69,822,853
IMPACT: INCOME RAND	8,180,567	14,285,782	10,841,068	33,307,417
IMPACT: EMPLOYMENT FTE	83	145	110	341
IMPACT: VAT				7,175,293

Source: National I/O Model, 2022 adjusted.

The following table shows the economic impacts of the proposed project for each year that it operates. It is typically assumed that a project of this nature will operate for at least 20 to 30 years. The impacts shown in the table will therefore take place each year during its 20 to 30 years of existence. In terms of the Full Time Equivalent jobs, the table shows that about 375 direct, indirect, and induced local jobs will be created in the shopping centre and petrol filling station.

Table 10: Total trading activities impact of the proposed development

OPERATIONAL IMPACT PER ANNUM	Direct	Indirect	Induced	Total
IMPACT: PRODUCTION RAND	45,704,230	47,638,583	59,293,630	152,636,443
IMPACT: GDP RAND	24,630,225	25,672,657	31,953,617	82,256,499
IMPACT: INCOME RAND	11,846,946	12,348,348	15,369,441	39,564,735
IMPACT: EMPLOYMENT FTE	112	117	146	375.0
IMPACT: VAT				5,465,687

Source: National I/O Model, 2022 adjusted.

² Information provided by the developer's professional team.

³ Input Output Models are economic models that simulated the backward and forward transactions in the economic system and thereby determine the economic direct, indirect and induced multipliers.

7.1.2 Impact on competing existing filling stations and retail centres

It has been indicated in the report that there are no shopping centres or filling stations close to the site. The closest shopping centre of significance is the Southgate SuperSpar centre with is more than 8 km from the site. The Southgate SuperSpar provides limited variety in retail goods and services and do not fully satisfy the needs of the market. Households need to travel more than 11 km to the Scottsville retail centres for a more comprehensive shopping experience. The Southgate and Scottsville centres attract market interest from a large part of the larger Pietermaritzburg market from surrounding communities and suburbs. The market area of the proposed development does not make out a significant part of their catchment areas. The development of the proposed centre will therefore have a negligible small impact on the existing shopping centres in Pietermaritzburg. This can be illustrated by showing that the proposed centre will be in the order of 5 000 m² GLA compared to the more than 200 000 m² GLA space in the existing centres in the City.

Similarly, the analysis showed that there are two filling stations within 11 km from the site. The one, Thornville station, is a small rural station with limited capacity serving the local Thornville agricultural community. This station is located off the R56 and do not market or attract traffic from the Richmond Road. The Southgate station is about 11 km from the site and pulls market support mainly for the local residential communities. The station is closely related to the domestic household market serviced by the SuperSpar. Although the Southgate station is located next to the R56, it is not reliant on the passing market. The proposed filling station will therefore not have a singular impact on one or two stations, but its impact will be dispersed between several stations in Pietermaritzburg CBD and surroundings (see Figure 15).

7.2 SOCIAL IMPACTS OF THE PROPOSED PROJECT

The socio-economic impacts of the proposed development are more difficult to determine and cannot easily be quantified. The following impacts are identified.

7.2.1 Impact on the Municipality's development objectives.

Section 3.2 indicated that the proposed development is fully inline with the development plans and objectives of Msunduzi. The proposed development contributes to the growth of the City through economic activity and employment creation, the densification of the urbanising area and supporting the growth of the emerging node.

7.2.2 Impact on convenience to the community

There are no shopping centres or petrol filling stations serving the local rural community which the proposed development is targeting. The local community households therefore have to travel significant distances to the existing centres, often taking two or more taxis to get to shopping centres. The proposed development will make a significant difference to the convenience of these households in providing facilities close by.

7.2.3 Impact on property values

The proposed development is part of the economic growth and development of the area and will lead to the attractiveness of the area as a residential area in which to live. The absence of shopping facilities is currently a deterrent to live and invest in the area. The development therefore will lead to a further increase of demand and the densification of the area, leading to increased property values.

7.2.4 Visual impact and sense of place

The proposed development is well located along the R56 and will be visible to the passing traffic and to the people of the surrounding community. It will therefore have a visual impact and a change in the sense of place of the community. This is however not necessarily negative as the area is rapidly changing from a rural to urban area, and the change in sense of place is welcomed by some. The change in sense of place shows that the area is developing and progressing. The residential developments taking place are mainly due to the low cost of living in the area rather than extolling the "rural" nature of the area. The land portion on which the new residential developments are taking place tend to be large and densities are relatively low. The visual impact of the proposed development on the sense of place of the area is therefore assessed to be small and is a positive indication of the progressiveness of the area.

7.2.5 Impact of additional noise

The proposed development will lead to an increase in noise levels in the area. During the building period noise levels may increase slightly but during the operational period, noise will increase due to the increase in vehicles, trucks and busses coming to the shopping centre and petrol filling station. The increase in noise is likely to be limited to the immediate area surrounding the site.

7.2.6 Impact on Safety and Security

The development of the site may lead to an increase in crime in the area. The area currently still has a rural nature transforming into an urbanised area. The level of petty crime is currently low but as it becomes more developed, the levels of housebreaking and muggings may increase. This often happens more often during the construction period when the building and construction labourers, who are often strangers in the area, come to the site. Crime levels are already exceptionally high in South Africa and the area may experience a general increase in crime as more and more developments take place in the area.

7.2.7 Impact on disadvantage person, women, and youth

The increase in employment opportunities and the levels of convenience of access to shopping facilities and filling station services, will improve the living conditions of the whole of the local community including that of the unemployed, women and youth. The proposed development will not have any negative impact on the poor, the disadvantaged, women, or youth.

7.3 SOCIO-ECONOMIC IMPACT RATING

The following table rates the socio-economic impact of the proposed development. The impact rating scores are based on the following:

Severity – weight level 1.5	Rating
Insignificant/ Non-harmful	1
Small/ Potentially harmful	2
Significant/ Slightly harmful	3
Great/ Harmful	4
Disastrous/ Extremely harmful	5
Duration – weight level 1	Rating
Up to 1 month	1
1 month to 3 months	2
3 months to 1 year	3
1 to 10 years	4
Beyond 10 years/ Permanent	5
Spatial Scale– weight level 1	Rating
Immediate, fully contained area	1
Surrounding area	2
Within business unit area or responsibility	3
Within boundary area/ Beyond business unit area	4
Regional, National, International	5
Frequency– weight level 1	Rating
Once a year or once/ more during operation	1
Once/ more in 6 months	2
Once/ more in a month	3
Once/ more in a week	4
Daily/ hourly	5
Probability – weight level 1.5	Rating
Almost never/ almost impossible	1
Very seldom/ highly unlikely	2
Infrequent/ unlikely/ seldom	3
Often/ regularly/ likely/ possible	4
Daily/ highly likely/ definitely	5

Overall significance score	Overall significance: Positive and Negative
6 to 10	Very Low
11 to 15	Low
16 to 21	Medium - Low
22 to 26	Medium
27 to 30	Medium - High
31 to 35	High

Table 11: Socio-economic impact rating table

REF NUMBER	PHASE	IMPACT DESCRIPTION	NATURE	Severity	Rate	Duration	Rate	Spatial Scale	Rate	Frequency	Rate	Probability	Rate	Significance Score	Significance rating
1	Construction and operations	Economic activity: employment and investment	Positive	Significant	3	Beyond 10 years/ Permanent	5	Within boundary area/ Beyond business unit area	4	Daily/ hourly	5	Daily/ highly likely/ definitely	5	30	Medium - High
2	Operational	Impact on existing shopping centres and filling stations	Positive	Insignificant	1	Beyond 10 years/ Permanent	5	Within boundary area/ Beyond business unit area	4	Daily/ hourly	5	Daily/ highly likely/ definitely	5	26	Medium
3	Operational	Municipal development objectives	Positive	Significant	3	Beyond 10 years/ Permanent	5	Surrounding area	2	Daily/ hourly	5	Daily/ highly likely/ definitely	5	28	Medium - High
4	Operational	Convenience to the community	Positive	Great	4	Beyond 10 years/ Permanent	5	Within business unit area or responsibility	3	Daily/ hourly	5	Daily/ highly likely/ definitely	5	31	High
5	Operational	Property values	Positive	Significant	3	Beyond 10 years/ Permanent	5	Surrounding area	2	Daily/ hourly	5	Daily/ highly likely/ definitely	5	24	Medium
6	Operational	Sense of place	Positive	Small	2	Beyond 10 years/ Permanent	5	Surrounding area	2	Daily/ hourly	5	Daily/ highly likely/ definitely	5	23	Medium
7	Construction and operations	Additional noise	Negative	Significant	3	Beyond 10 years/ Permanent	5	Immediate, fully contained area	1	Once/ more in a week	4	Daily/ highly likely/ definitely	5	22	Medium
8	Operational	Safety and security	Negative	Significant	3	Beyond 10 years/ Permanent	5	Immediate, fully contained area	1	Once/ more in a week	4	Daily/ highly likely/ definitely	5	22	Medium
9	Operational	Disadvantaged person, women and youth	Positive	Small	2	Beyond 10 years/ Permanent	5	Surrounding area	2	Daily/ hourly	5	Daily/ highly likely/ definitely	5	23	Medium

8 CONCLUSION AND RECOMMENDATION

8.1 SYNOPSIS OF FINDINGS

The purpose of this project is to address the following:

- a) Feasibility study for a proposed fuel service station and retail centre with associated land-uses.
- b) Formulate a socio-economic impact assessment for the proposed development.

The proposed development is to comprise of the following:

1. Fuel Service Station fuel storage tanks [4 x 23 000 litres petrol], 2 x 23 000 litres diesel totalling 138 000 litres, all underground, 4 x pump islands and 8 bousers, concrete paving & canopy at the forecourt. A convenience store and fast-food outlet is to be located on the site.
2. Retail Centre with anchor shop line shops comprising
 - Restaurant
 - Pharmacy
 - Bottle store
 - Doctors' rooms
 - A gymnasium and tyre shop.
 - Taxi rank and bus terminal.

The proposed site is located within a residential area, which is a combination of formal and informal/rural areas. The surrounding suburbs to the north of the site include Westgate, Foxhill Embleton, Slangspruit, Shenstone and Thornville to the south.

The total site is 2, 8328 hectares in extent and in the main vacant but for a double storey dwelling on site. The site falls within the Msunduzi Municipality's area and borders onto the Richmond Municipality in the south. The site is 3 km north of the small town of Thornville which is within the Richmond Municipal area.

The main features of the assessment are:

- A household population of 5000 people is included in the market catchment area that comprise the population of Foxhill and other surrounding areas.
- This area is rural in nature transforming rapidly into an urbanised area with limited existing shopping facilities. The main competitor for the proposed development is Southgate Spar.
- The proposed retail centre is close to a residential area and well connected to road networks. This makes the proposed shopping centre ideally situated to capture the local, surrounding market and transient market.
- The assessment indicated a need for new shopping facilities in the area, as there are no current facilities to meet the growing local demand in the area, because of rapid urbanization in the area.
- It is recognised that this development may have specific aspects that make it somewhat unique from broad national and provincial trends, most important of which is that there are currently no formal retail offerings in this rapidly urbanizing area and the closest available shopping centre is more than 8 km away which comprises of one anchor store, Spar, and convenient shops. This indicates that the community have limited options when it comes variety of shops. They are

required to travel more than 8 kms for other retail options and services such as clothing, furniture, household goods and banking services.

- The market demand assessment shows sufficient demand exists within the market catchment area to sustain the proposed retail development and petrol filling station.

Effective Demand for Retail on the Proposed Site	TOTAL GLA 2022	TOTAL GLA 2025	TOTAL GLA 2030
	2022	2025	2030
Total Effective Demand m2	5,385	5,884	6,822

Demand for fuel	Inception rate: 4%			
	Light Vehicles	Taxis	Bus	Heavy Vehicles
Number of vehicles	253	34	0	26
Average fill (litres/vehicles)	30	60	75	100
Fuel litres/day	7,598	2,029	0	2,576
Fuel litres/month (30 days)	227,948	60,858	0	77,280
Total litres/month	366,086			

8.2 SOCIO-ECONOMIC IMPACT

The proposed project will have on a balance of positive and negative impacts, a positive impact on the socio-economic environment. From an economic perspective the project will have the following total economic multiplier impacts during construction and operational phases:

ECONOMIC IMPACT OF THE PROJECT	Total: Construction: Once off	Total: Operations per annum
IMPACT: PRODUCTION RAND	244,291,742	152,636,443
IMPACT: GDP RAND	69,822,853	82,256,499
IMPACT: INCOME RAND	33,307,417	39,564,735
IMPACT: EMPLOYMENT FTE	341	375.0
IMPACT: VAT	7,175,293	5,465,687

The assessment of the social and economic impacts is summarised in the following ratings table.

REF NUMBER	PHASE	IMPACT DESCRIPTION	NATURE	Significance rating
1	Construction and operations	Economic activity: employment and investment	Positive	Medium - High
2	Operational	Impact on existing shopping centres and filling stations	Positive	Medium
3	Operational	Municipal development objectives	Positive	Medium - High
4	Operational	Convenience to the community	Positive	High
5	Operational	Property values	Positive	Medium
6	Operational	Sense of place	Positive	Medium

REF NUMBER	PHASE	IMPACT DESCRIPTION	NATURE	Significance rating
7	Construction and operations	Additional noise	Negative	Medium
8	Operational	Safety and security	Negative	Medium
9	Operational	Disadvantaged person, women and youth	Positive	Medium

8.3 FINAL RECOMMENDATIONS WITH MITIGATIONS

Bases on the analysis and findings of this report, the proposed shopping centre and petrol filling station development is viable from a socio-economic point of view. It is therefore recommended that the proposed project continue subject to the following mitigations:

1. Noise levels emanating from the shopping centre and filling station should be minimised. Possible mechanisms are:
 - a. Restrict all activities during construction and operations to day-light working hours.
 - b. Diffuse the impact of noise through the planning of trees and vegetation that are able to absorb noise from the site.
 - c. Others as may be identified by the developer.
2. Manage the safety and security of the site and surrounding area and communities by:
 - a. Providing security services on-site.
 - b. Assist the community in establishing a community policing forum and actively participate such a forum.
3. Employ local community persons as much as possible during the construction and operational phases.
4. Implement a skills training programme for employees and community members to advance their skills.
5. Institute a supplier development programme aimed at sourcing goods and services from local enterprises.

ANNEXURE A: SITE AND RETAIL APPLICATIONS IN MSUNDUZI / PIETERMARITZBURG AS ON 22 12 2022

Source: DME: New to Industry Site and Retail Applications

Region	Lodged Date	Type	Ref. No.	Registered Name	Property Address	Current Status
KZ	7/20/2017	Site New	E/2017/07/20/0001	OBAID INVESTMENTS (PTY) LTD	NO 1382 PIETERMARITZBURG, 20 WILLOWTON ROAD, PIETERMARITZBURG, 0301	ISSUED
KZ	7/20/2017	Retail New	E/2017/07/20/0002	SUHAIFA HOUSEN	NO 1382 PIETERMARITZBURG, 20 WILLOWTON ROAD, PIETERMARITZBURG, 0301	ISSUED
KZ	4/6/2018	Site New	E/2018/04/06/0001	AY MOOLA FAMILY TRUST	ERF 2257 SHORTTS RETREAT, Crn BRISTOL ROAD and SHORTTS RETREAT ROAD, MKHONDENI, PIETERMARITZBURG, 3201	ISSUED
KZ	4/6/2018	Retail New	E/2018/04/06/0002	KONDENI FUELS PTY LTD	ERF 2257 SHORTTS RETREAT, Crn BRISTOL ROAD and SHORTTS RETREAT ROAD, MKHONDENI, PIETERMARITZBURG, 3201	ISSUED
KZ	10/5/2018	Site New	E/2018/10/05/0001	MAGEZA SERVICE STATION CC	ZWARTKOP LOCATION 4669, 4669 ZWARTKOP LOCATION, MPUMUZA, PIETERMARITZBURG, 3200	PRINTED
KZ	10/5/2018	Retail New	E/2018/10/05/0002	MAGEZA SERVICE STATION CC	ZWARTKOP LOCATION 4669, 4669 ZWARTKOP LOCATION, MPUMUZA, PIETERMARITZBURG, 3200	PRINTED
KZ	10/24/2018	Site New	E/2018/10/24/0002	NOOR MAHOMED FAMILY TRUST	PORTION 16 OF ERF 1918 PIETERMARITZBURG, 10 BIRMINGHAM ROAD, WILLOWTON, PIETERMARITZBURG, 3200	PRINTED
KZ	10/24/2018	Retail New	E/2018/10/24/0003	CENTROL PTY LTD	PORTION 16 OF ERF 1918 PIETERMARITZBURG, 10 BIRMINGHAM ROAD, WILLOWTON, PIETERMARITZBURG, 3200	PRINTED
KZ	1/16/2019	Site New	E/2019/01/16/0002	R & S CHETTY FAMILY TRUST	PORTION 7 (OF 5) ERF 3126 PIETERMARITZBURG, 94 ISSUED MOSES MABHIDA ROAD, PIETERMARITZBURG, 3201	
KZ	1/16/2019	Retail New	E/2019/01/16/0003	RELIANCE GREEN ENERGY FUND PTY LTD	PORTION 7 (OF 5) ERF 3126 PIETERMARITZBURG, 94 ISSUED MOSES MABHIDA ROAD, PIETERMARITZBURG, 3201	
KZ	2/3/2020	Site New	E/2020/02/03/0003	VIJEN SINGH GROUP HOLDINGS (PTY) LTD	PORTION 88 OF ERF 281 PIETERMARITZBURG, 68 COLLEGE ROAD, PIETERMARITZBURG, 3206	ISSUED
KZ	2/3/2020	Retail New	E/2020/02/03/0004	VIJEN SINGH GROUP HOLDINGS (PTY) LTD	PORTION 88 OF ERF 281 PIETERMARITZBURG, 68 COLLEGE ROAD, PIETERMARITZBURG, 3206	ISSUED

Region	Lodged Date	Type	Ref. No.	Registered Name	Property Address	Current Status
KZ	10/28/2020		Site New	E/2020/10/28/0001	BP SOUTHERN AFRICA PTY LTD	REFUSED
					PORTION 2 OF ERF 3111, Crn EDENDALE AND CAMPSDRIFT ROAD and , PIETERMARITZBURG, 4450	
KZ	10/28/2020		Retail New	E/2020/10/28/0002	MAFE ENTERPRISE	REFUSED
					PORTION 2 OF ERF 3111, Crn EDENDALE AND CAMPSDRIFT ROAD and , PIETERMARITZBURG, 4450	
KZ	10/22/2021		Site New	E/2021/10/22/0003	MPUMEM (PTY) LTD	PRINTED
					A PORTION OF THE FARM MAPHUMULO NO 16546, 'MAPHUMULO ROAD, MAPHUMULO, PIETERMARITZBURG, 3201	
KZ	10/22/2021		Retail New	E/2021/10/22/0004	TSHEYI SERVICE STATION PTY LTD	PRINTED
					A PORTION OF THE FARM MAPHUMULO NO 16546, 'MAPHUMULO ROAD, MAPHUMULO, PIETERMARITZBURG, 3201	
KZ	2/18/2022		Site New	E/2022/02/18/0001	AFRO PROP NATAL (PTY) LTD	REFUSED
					ERVEN 293-297 LYNNFIELD PARK, 1 IBHUBESI INDUSTRIAL PARK, LYNNFIELD PARK, MSUNDUZI, 3201	
	2/18/2022			E/2022/02/18/0002	LION PARK TRUCK STOP (PTY) LTD	REFUSED
					ERVEN 293-297 LYNNFIELD PARK, 1 IBHUBESI INDUSTRIAL PARK, LYNNFIELD PARK, MSUNDUZI, 3201	
KZ	3/2/2022	Site New	E/2022/03/02/0001	ODESSA EIENDOMS (PTY) LTD	PORTION 2, ERF 4380 PIETERMARITZBURG, Crn PORTION 2, ERF 4380 and , MKONDENI, PIETERMARITZBURG, 3201	ACCEPTED
KZ	3/2/2022	Retail New	E/2022/03/02/0002	QUANTUM ENERGY KZN (PTY) LTD	PORTION 2, ERF 4380 PIETERMARITZBURG, Crn PORTION 2, ERF 4380 and , MKONDENI, PIETERMARITZBURG, 3201	ACCEPTED - WITHOUT INFORMATION