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HANDICRAFTS MARKET ASSESSMENT

LEBANON INDUSTRY VALUE CHAIN DEVELOPMENT (LIVCD) PROJECT

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1. INTRODUCTION TO SMALL SCALE HANDICRAFT SET

Handicrafts are generally defined as artisanal crafts that serve an economic or decorative purpose and are created by the hands or with simple tools. For this assessment LIVCD has further refined this definition in order to facilitate exploration and analysis of the Handicraft sector in Lebanon. Refining the characteristics of Handicrafts in Lebanon allows the assessment to better focus on those artisanal crafts with the highest potential for economic development and benefit. The refined characteristics that LIVCD will explore and analyze include: 1) the handicraft uses traditional techniques and preserves elements of Lebanese cultural heritage; 2) the handicraft serves utilitarian purposes; and 3) the handicraft is uniquely decorative, with strong potential appeal for the tourism and international export markets. The majority of handicrafts presented in this assessment possess all three of these characteristics.

LIVCD has chosen to define handicrafts through a more narrow set of criteria because upgrading strategies in this sector not only have the opportunity to impact rural and marginalized households, but these crafts represent a cultural Lebanese heritage that should be preserved and protected. Cultural heritage is the legacy that past generations hand down to modern countries, and these traditions can contribute to a nation's identity and unity. Lebanon has a rich and complex history and LIVCD understands that this is an asset that can empower youth, bring fractured groups together, and create economic gains for individuals, as well contribute to entire industries, such as tourism.

In Lebanon there is currently no active program to maintain cultural heritage through attention to this handicraft sector. Both homes and workshops may serve as a retail location for the producer. The majority of producers are not able to use crafts as their main source of income. Other sources of income may be small agricultural production, food processing and industrial work.

The largest challenge facing handicraft producers is a lack of marketing and retail opportunities for products. Without targeted promotion and marketing strategies, handicrafts cannot compete with mass produced commercial products, or cheaper replicas from neighboring countries. With the recent downturn in tourism, secondary-sale artisanal locations and tourism retail markets have decreased in number and are not actively seeking products. In 2007, there were approximately 15 secondary-sale locations in and around Beirut selling traditional handicraft products.

It is difficult to estimate the total retail value of all of the crafts produced in Lebanon because producers and retail points are dispersed throughout the country, with no consistent or significant aggregation or tracking. In addition to this, the majority of sales occur through inconsistent custom orders directly from producers. The monthly income that can be generated varies greatly based on the type of craft.

However, there are currently 30 operating Kafalat loans in the Lebanese handicraft industry, demonstrating continued interest in the sector if opportunities for revenue can be expanded. There is a significant opportunity for LIVCD to have a positive impact in the handicraft sector through targeted craft interventions and intersections with other LIVCD Value Chain upgrading strategies.

TABLE 1 – PORTFOLIO OF OPERATING LOANS FROM 01/01/2000 TO 31/12/2012 – BY SECTOR¹

| Sector | Number | Amount | Outstanding | |
|-----------------------|------------|-------------------|-------------------|-----|
| Craft Industries | 30 | 3,299,000 | 2,810,175 | USD |
| Advanced Technologies | 9 | 1,745,680 | 1,314,797 | |
| Agriculture | 267 | 24,836,938 | 18,867,872 | |
| Tourism | 143 | 20,239,542 | 16,050,170 | |
| Industry | 293 | 36,933,861 | 26,108,440 | |
| Total | 742 | 87,055,021 | 65,151,455 | |

2. INTERSECTIONS AND OVERALL STRATEGIES

Lebanon has a deep and rich tradition of craft production and through both targeted and broad interventions LIVCD has the opportunity to promote the cultural heritage of the country, increase the net revenue of producers, and create strong linkages between the craft industry and other LIVCD Value Chains. Overall the craft industry within Lebanon needs help in establishing a known brand, marketing their products, and opening new retail opportunities. As demonstrated above, the majority of producers have other sources of income, and there are loan opportunities available. Interventions in this sector should be focused on value-add elements and end-market opportunities.

LIVCD recommends six overarching strategies and interventions for the Handicraft market.

1. Establish a trusted database of Lebanese craftspeople and the retail outlets supporting them.
2. Assist craftspeople in the marketing and packaging of products, and help establish new regional and international retail opportunities.
3. Encourage craftspeople to form associations and groups.
4. Establish a strong connection with tourism operators and closely link craft interventions with the LIVCD Tourism Value Chain.
5. Provide overall training to craftspeople on design upgrading, finishing elements, and financial management.
6. Support Lebanon’s craft fairs and exhibitions and encourage craftspeople to attend regional and international exhibitions.

Opportunity 1: Lebanon’s craftspeople are dispersed throughout the country, and have no formal representative organization as traditional artisans. A means of strengthening the sector is to produce a trusted database identifying handicraft producers and their products. This will differentiate authentic handicraft products from less expensive mass produced commercial goods and help protect producers from cheap replications. This will legitimize producers, and serve as a resource for consumers who are interested in authentic and traditional products. This intervention can also facilitate opportunities to

¹ (KAFALAT s.a.l, “Portfolio of Operating Loans from 01/01/2000 to 31/12/2012 - By Sector”, http://www.kafalat.com.lb/31_12_2012/kafalat_loan_stat_sector4.htm)

expand the role of craftspeople and their production within the tourism sector, particularly facilitating the development of craft-oriented tourism packages and product promotion. Promotional materials can be customized from this database, becoming a valuable resource for tourists and Lebanese travelers.

Opportunity 2: Currently, craftspeople work in small workshops or individually, and are engaged in production as well as additional work for secondary sources of income. They do not have the resources to consistently market their products and build networks of potential clients. These producers need strategic assistance in promoting products domestically, regionally, and internationally. This can occur through upgrading online marketing and sales, establishing connections with artisanal stores in neighboring countries and internationally, and through building channels which quality products can consistently and sustainably flow through.

Opportunity 3: There are many advantages to group and association formation for the handicraft sector. Group formation for craftspeople will provide purchasing leverage for necessary raw materials, and can facilitate combined marketing and transportation of products. Groups and associations can facilitate knowledge sharing to improve product marketability and promotion. Associations that are craft specific, such as trade associations, will be integral to fully capitalizing on the database and promotional materials described in Opportunity 1.

Opportunity 4: Craft production and tourism are very closely linked, and many of the opportunities and strategies within the LIVCD Tourism Value Chain will likely benefit from linkages with handicraft opportunities and strategies. Through the promotion of defined Lebanese tourism routes, region specific crafts can be highlighted and retail outlets supporting these crafts included in tour packages. The promotion and establishment of museums and cultural centers that highlight regional history and craft production will raise awareness about the products and create additional tourism destinations. The opportunity for tourism groups to include craft production as a stand-alone experience, and pay producers to teach and participate in production with their visitors, can provide both a unique and rewarding experience for the visitors and an additional source of income for the craftspeople. Repeated and quality interactions between the handicraft and tourism sectors will create expansion synergy for both sectors.

Opportunity 5: Crafts within Lebanon are characterized by their traditional quality; however, many of the traditional designs and materials are no longer sought after in today's markets. There is a significant opportunity to link groups of craftspeople with contemporary designers and market experts who can work with them to develop new concepts while preserving the heritage elements of production. If marketing and retail opportunity interventions are successful, it is essential that producers are prepared with consistent and high quality products to ensure sustainability in new markets. Similar linkages have been successfully implemented in the artisanal sectors of neighboring countries. In addition to product development, craftspeople will greatly benefit from training in financial management. Many workshops have been engaged in production for generations with no formal bookkeeping or tracking of income and expenses. Financial training offers the opportunity to capture a larger proportion of net revenue, particularly valuable if there is increased production resulting from the opportunities described in this assessment.

Opportunity 6: The fairs and exhibitions that occur in Lebanon today are a great resource and opportunity for craftspeople. These venues provide additional retail opportunities and expose craftspeople to potential new clients. Fairs and exhibitions are events that regional and international tourists can plan trips around. LIVCD can support both tourism and craft production by marketing and supporting the fairs that occur now, and through helping to establish new fairs and exhibitions. In addition to supporting domestic fairs

and exhibitions, LIVCD can support craftspeople in attending regional and international fairs that are suited to their product.

TABLE 2 – CURRENT FAIRS AND EXHIBITIONS PROMOTING HANDICRAFTS IN LEBANON

| Name | Description | Location | Date |
|-------------------------|--|---|--|
| The Garden Show | Gardening, decoration and furniture, food available | Beirut Hippodrome, Abdallah Al Yafi Ave | May 28-June 2 |
| Layali el Souk Al-Ateeq | Lebanese traditions, culture, arts, crafts and food | Zouk Mikael | End of July (the festival is held for 11 nights) |
| Beirut Cooking Festival | Cooking demonstrations, wine tasting, crafts | Beil, Beirut | October-November |
| Souk El Tayeb | Farmers market with fresh groceries, processed foods, and crafts | Downtown, Rablos St, Beirut Souks | Every Saturday morning |
| Food and Wine Festival | Cooking demonstrations, wine tasting, crafts | Hamra | December 4-7 |

3. METAL

Metalworking within Lebanon has a rich history, and has both small enterprise families and individual craftspeople working in the sector. The three types of metalworking products described in the analysis below reflect Lebanese heritage, serve an economic purpose, and have tourism market potential. The largest opportunities for increasing metalworking retail revenue involve opening new regional and international markets that can offer a higher value for the products.

POUNDED COPPER

The craft of pounding copper is rooted in Islamic tradition and used in the creation of kitchen and other household items. Pounded copper refers to the unique dimpled effect that is created by repeatedly hammering into an area of the copper piece that is void of other design elements. The main types of products crafted with this technique include dessert trays, lamps, vases, flower pots, decorative tiles, and large kitchen tools used for preparing Ramadan dishes. Pounded copper producers are primarily male.

MARKET OVERVIEW – POUNDED COPPER

It is difficult to estimate the number of pounded copper craftspeople (producers) active in Lebanon today, but approximately 20 small workshops can be seen in Tripoli. Individual craftspeople may be operating in other regions as well.

There is domestic demand for pounded copper products and a large potential for regional trade in the Middle East, as well as international trade outside of the Middle East..

A challenge in the pounded copper market is the growing price of raw copper. The cost for raw metal has increased by 80% in the past 10 years and this has put significant strain on retail trade. The increased cost the raw copper adds to retail pricing can make products too expensive for local consumers. Some craftsmen are switching to aluminum, which is cheaper, lighter, and more durable for the utilitarian purposes of the products; however, this practice may change the aesthetic and cultural aspects of the products.

PRODUCTION – POUNDED COPPER

Raw red and yellow copper is usually imported from Italy in plates of 2m x 1m x 1cm. Red and yellow copper is distinct in color due to the size of the copper oxide particles that form the material. The number of pieces that can be created from one plate varies based on the size and complexity of the piece.

The craftsperson cuts a piece of the desired size off of the raw copper plate and begins heating it using a gasoline tank. Once the metal is hot enough to be pliable, it is bent into the desired shape and pounded on an anvil to create the dimpling pattern. Blasts of pressurized oxygen are used to create patterns in the heated copper and also used to cool portions of the piece that are complete. Smooth patterns are also created using various stamping machinery and hand tools.

Molding and pounding causes the raw copper to become discolored. Hydrochloric acid is rubbed onto the piece to return it to its original copper color. A different type of acid must be used for red and yellow copper. A further analysis of the acid used may be necessary to determine whether it is being disposed of correctly. Improper disposal can lead to hazardous waste.

FIGURE 1- DECORATIVE COPPER TILE



FIGURE 2-COPPER WORKSHOP



MARKET CHANNELS – POUNDED COPPER

The majority of copper products are directly retailed by craftspeople, either from workshops, storefront locations, or through custom orders. The most well-known production area for pounded copper is Tripoli. There are a series of workshops with retail fronts in the old market of the city. The workshops and techniques are handed down within families, and the extended family is commonly engaged in production together and creates small enterprise workshops. The access these Tripoli craftspeople have to retail storefronts in a well-known area for copper products gives more visibility and potential for income generation from tourism, as well as local clients seeking custom orders. There are also independent metal workers outside of Tripoli, many who use new materials and techniques, but reference arabesque style and the pounded technique.

Despite the opportunities that the market for copper products offers for retail, producers have seen a downturn in tourism revenue, and the rising cost of copper has made the product too expensive for many local clients.

Some copper products are sold to secondary retail locations, such as artisanal stores, but this is less common due to the heavy and expensive characteristics of the product. These same characteristics make it less suited for tourism, and it is not common in specialized tourism locations. Craftspeople are moving towards production of smaller decorative souvenir products and different raw materials to capture more of the tourism market.

Producers do not usually bring their products to local fairs and exhibitions because of the weight and size of the products. Also, the relatively high value of the products may make them less marketable at these venues. There is no official data on regional or international trade in pounded copper.

OPPORTUNITIES – POUNDED COPPER

There are three opportunities for LIVCD to work on Pounded Copper

1. Increase net revenue and domestic sales by encouraging workshops and individual craftspeople to form associations to reduce the informal custom payments that are sought for imported copper.
2. Increase the volume of production and improve net revenue by encouraging workshops and individual craftspeople to use traditional production techniques with new, less expensive, raw

materials such as aluminum; and produce new smaller products, which would be less expensive to produce and more easily transported before and after sale.

3. Increase domestic sales and exports by identifying new retail opportunities and linking craftspeople to regional markets attended by higher end purchasers.

Opportunity 1: The raw cost of copper has increased by 80% over the past 10 years. Individual craftspeople importing copper face huge custom taxes in addition to the rising raw cost. The rising cost of the raw product is also creating end retail prices that are too high for domestic consumers. Registered associations must pay the 2.4% custom duty, however, importing as an association may greatly reduce the informal payments that could be paid by individual craftsmen.

Opportunity 2: The increased raw material cost for copper, and the corresponding higher retail prices, are causing a strain on craftspeople in the market. In addition to the price increases, the traditional copper products are heavy, tarnish easily, and require maintenance, such as boiling and consistent cleaning with vinegar or lemon juice, to prevent oxidation. LIVCD recommends that producers transfer traditional production techniques to new materials such as aluminum, which is less expensive, lighter in weight, and requires virtually no maintenance. There are craftspeople already using aluminum successfully and this should be expanded to more producers. In addition to new raw material, craftspeople have an opportunity to use traditional techniques to create new forms and products that are easier to transport and have greater tourism appeal. Products may still have a utilitarian use such as ashtrays, cosmetic jars and jewelry boxes, but they would be easier to display in tourism locations, and easier for tourists to transport. A set of trainings on using new material, and potentially providing samples of the material, can encourage craftspeople to move at least some production to a lower cost product.

Opportunity 3: Pounded copper and aluminum kitchenware, vases, and lamps are known products throughout the Arab region. The skilled production and traditional techniques used to produce these items would appeal in high end regional markets, specifically the GCC Countries, but there is not currently a formalized trade link that the products can flow through. The LIVCD project has an opportunity to establish contacts in potential regional markets, and promote the products through exhibitions and marketing in GCC countries.

EMBOSSSED METAL

Embossing on metal refers to a technique of using hand tools to press designs into thin sheets of pewter or mixed metal to create varying raised and depressed patterns. The patterned metal created using this technique is usually affixed as a decorative element to frames, boxes, chests, mirrors and other small products. Based on data from multiple interviews with metal embossing craftspeople, it is likely that embossed metal products were traditionally produced by religious organizations as a decorative element utilizing Christian religious iconography. Both men and women are active in embossed metal production.

MARKET OVERVIEW – EMBOSSSED METAL

There are approximately 60 crafts people currently working in embossed metal. The majority of these people are independent and not part of a larger workshop. There is some crossover between the traditions of pounded copper and embossed metal in their use of a dimpling effect on the metal. In addition to the traditional designs, producers are also using Arabesque patterns to appeal to a wider market.

The domestic market for embossed metal pieces is comprised of sanctuary sites, organizations seeking custom orders, and some products re-sold in secondary retail outlets. The products are largely decorative,

and are often affixed to a simple wood or leather base, but can be affixed to a utilitarian objects such as chests, boxes and mirrors.

PRODUCTION – EMBOSSED METAL

Rolls of pure pewter or a mixture of chrome, aluminum and pewter, are imported from Europe. Each roll is 12m x 1 m, and less than a millimeter in thickness. Pure pewter rolls are significantly more expensive than mixed metal rolls, but are easier to emboss and give a more lustrous end product.

Two to four pieces can be made from 1m x 1m of rolled metal. Craftspeople tend to make smaller pieces, approximately eight from a 1m x 1m piece of rolled pure pewter due to the higher raw material cost.

Once craftspeople conceptualize a piece, they draw it on stencil paper. A section of metal is cut off the roll and the stenciled design is laid over the metal sheet. Rounded tools are then used to press into the back side of the sheet, referred to as embossing, creating a raised effect for the desired design. Then small patterned tools are used to gently hammer indentations and dimples on the front side of the sheet in the spaces left between the embossed designs.

After the embossing and patterning is complete, plastic glue is poured into the embossed sections to further indent the design. The glue is allowed to harden for 1 day. After the pattern is set in this way the glue is removed. The black paint is applied to the front side of the entire piece, and then wiped off of the raised areas. The black paint creates an illusion of depth within the dimpled patterns. The paint that was not wiped off is allowed to dry for 1 day. After the paint is dry the completed metal product is affixed to whatever base, or object the craftsperson has chosen. Bases are typically made of wood or leather, and are pre-fabricated by local wood and leather workers for the craftspeople. Tiny nails are used to attach the metal sheet to the wood or leather. After the metal is affixed it is varnished to prevent discoloration. The varnish is left to dry overnight.

Alternately, the embossed metal craftspeople can sell their varnished products to the producers of items such as boxes, icons, chests and mirrors who affix the embossed metal pieces to their items before sale.

OPPORTUNITIES – EMBOSSED METAL

There are four opportunities for LIVCD to work on Embossed Metal

1. Increase net revenue and domestic sales by encouraging workshops and individual craftspeople to form associations to reduce the informal custom payments that are sought for imported pewter and mixed metal.
2. Increase domestic sales and exports by identifying new retail opportunities and linking craftspeople to regional Middle Eastern and international markets.
3. Increase sales by improving branding and marketing of the product.
4. Increase sales by linking product to retail opportunities along tourism routes.

Opportunity 1: Similar to raw copper, raw pewter and mixed metal rolls are currently being imported from European countries for embossed metal production within Lebanon. However, craftspeople in this market are operating at an even smaller production level than pounded copper producers. They are mostly individual producers or very small enterprises, and the raw material needed is usually purchased in a smaller quantity. These elements make informal custom fees a large burden for embossed metal craftspeople. If associations are formed, it can greatly reduce the informal custom payments that are charged on metal imports.

Opportunity 2: Embossed metal is used as a decorative element on utilitarian products and may have a large appeal stylistically within GCC and European markets. The monastic tradition of the product and current sales in sanctuaries can be expanded in Europe, and the new Arabesques patterns that are being used create a unique product would hold appeal in GCC countries. Craftspeople are currently engaging in online marketing and retail to international clients, but if formal trade flows can be established to regional and international retail markets outside the Middle East, it will greatly increase the potential revenue of producers.

Opportunity 3: Embossed metal as a craft is not as well known as other domestic craft products. Due to the monastic origins, and the mostly small scale producers, there are not established geographic areas of production, and potential buyers must actively search for the product. Assisting embossed metal craftspeople in expanding their online marketing presence, attending domestic and regional fairs and exhibitions, and engaging in marketing and retail in new domestic locations, would improve sales.

Opportunity 4: Embossed metal products are relatively small and light weight, making them well suited to tourism specific retail locations. Embossed metal workers need to be linked to locations along tourism routes throughout Lebanon, with a targeted focus on sanctuary and monastery sites. Newer embossed metal products also feature modern Lebanese themes that can be appropriate for broader tourism retail in larger urban centers.

ENGRAVING, STAMPING AND MOLDING WITH METAL

The processes of engraving, stamping and molding with metal are grouped within this analysis because the characteristics and use of the end products are similar. Further, they do not fully fit into the definition of individual crafts as defined in this assessment, that is, the products of these three types of metalwork are currently being produced by a small number of individual craftspeople; production techniques are not traditional; and producers commonly use machinery for large portions of the production. The products

produced using these processes serve a primarily decorative function. There is little opportunity for them to enter markets outside of Lebanon, but there is a large tourism potential.

Engraving refers to cutting into metal to create various designs. Patterns are typically Arabesque, and stencils and cutting machines are used in production. Stamping on metal pieces is done by many of the same craftspeople as engraving. A pattern is created on a large metal stamp, and pressed into piece of metal to create Lebanese themes on small decorative items. Metal molding is a process in which scrap metal is melted down and poured into molds of traditional Phoenician figurines on bases. These figurines are produced in multiple sizes, and then painted with blue and gold paint.

The craftspeople engaged in these forms of metal working most commonly sell their products through secondary-retail in specialized tourism locations. They also participate in local fairs and exhibitions. The craftspeople currently engaged in these three types of production will benefit from the types of opportunities presented for pounded copper and embossed metal craftspeople. LIVCD does not recommend specific interventions for engraving, molding and stamping crafts at this time.

FIGURE 4- OTHER METAL PRODUCTS



FIGURE 5- METAL STAMPING

4. WOOD

The category of woodcrafts within Lebanon includes different products of carved wood, and basketry made from reeds and wheat. Woodcarving and basketry are traditional crafts produced throughout the world. In Lebanon, carved wood products are usually produced in small craft shops by predominantly male individuals with some family participation, while baskets are produced by rural women in their homes. The products currently produced in Lebanon capture traditional Lebanese heritage and have utilitarian purposes, but are relatively simplistic compared to products produced elsewhere in the world, and are not unique enough to differentiate them as a Lebanese woodcrafts. There are opportunities to add value to these products through product design and finishing elements.

CARVED KITCHEN ITEMS

Carved kitchen items are basic products, trending towards rudimentary, serving solely utilitarian purposes. Products include rolling pins, cutting boards, mallets, thyme sifters, large spoons, and small stools and chairs. These products are commonly sold at low prices and left unfinished, with little sanding and no finishing details.

MARKET OVERVIEW – CARVED KITCHEN ITEMS

The total number of carved kitchen item producers is not known, but the woodworking area of Saida has approximately 10 craftspeople, and Tripoli and other urban areas likely have similar numbers. The total retail revenue of annual production is difficult to estimate because the majority of these products are retailed through custom orders from restaurants. Based on the annual production for one craftsperson, and assuming that there are 40 active wood carvers in Lebanon, There is a domestic market for the products as cheap economic utensils, but they cannot compete with Chinese made products, and it does not have the finish work that appeals to the tourism market.

PRODUCTION – CARVED KITCHEN ITEMS

Existing small wood workshops have old machinery and hand tools handed down to them through the family. Wood is purchased by the ton. Wood pieces are sawed off of large blocks and carved using both a mechanical shaping machine and hand working. An experienced craftsperson can produce a small utensil in 10 minutes.

FIGURE 6-CARVED KITCHEN ITEMS



MARKET CHANNELS – CARVED KITCHEN ITEMS

The production of carved kitchen items is mainly done in small workshops in urban areas of Lebanon. Similar to pounded copper, cities such as Saida, have a street of workshops known for woodworking with retail fronts in an area of the old market. Most craftspeople had the production techniques and equipment handed down within their families.

Carved kitchen items are sold through direct retail from workshop fronts. Craftspeople also receive custom orders from restaurants and organizations. Some craftspeople participate in local fairs and exhibitions. These products are not resold in any secondary-sale artisanal shops or tourism locations. There is no official data on regional or international trade in the carved kitchen items.

OPPORTUNITIES – CARVED KITCHEN ITEMS

There are two opportunities for LIVCD to work on Carved Kitchen Items

1. Increase domestic sales by encouraging and assisting craftspeople to add finishing and detail elements to the product.
2. Increase domestic sales and displace imports by improving branding and marketing of the product.

Opportunity 1: Carved kitchen products are currently rudimentary, lack finishing details such as sanding, and lack unique value-added elements. The product cannot compete in price with commercially produced kitchen items that domestic consumers can easily obtain, and carved kitchen items are not unique enough to appeal to a tourism or high end market. The largest impact that LIVCD can have in this market is to provide training, and link craftspeople to designers, to customize and enhance products. The product is currently inexpensive, but higher prices will not harm sales if the value of the product can be enhanced to appeal to more domestic and tourism customers.

Opportunity 2: Craftspeople working in carved kitchen items rarely attend fairs and exhibitions and rely on known urban locations to retail products. If products are upgraded, there is a potential to further increase sales by encouraging participation in fairs and linking producers to secondary sales locations and

marketing opportunities. Increased awareness and demand for the product also has the potential to displace the current imports of wood kitchen utensils.

BASKETS

Basket making is one of the oldest crafts in human civilization and involves weaving reeds, sometimes with other materials, to create carrying vessels and mats. Baskets are primarily utilitarian products that can have decorative elements. Basket products are used to hold fruit, bread, and other edible items. Larger baskets are used as wastebaskets and larger carrying vessels. Reed weaving is also used to create small mats for restrooms and kitchens.

MARKET OVERVIEW – BASKETS

The number of active basket producers is not known. There is a basket making cooperative in the village of Kwachra in the Akkar region of Lebanon. The cooperative currently has six members, and there are additional non-members who engage in basket making for household use. The total retail revenue of annual basket production cannot be estimated because it is largely based on custom orders and fair participation. The annual amount produced can vary significantly between years.

The domestic market for handmade baskets is based around custom orders placed by restaurants, with some direct retail through shops and exhibitions. There is no regional or international trade in handmade baskets. A large challenge in the market for handmade baskets is the low cost of mass produced products. The Lebanese Institute for the Blind produces and sells baskets made through training those with the handicap, and uses the institute as a sales mechanism for the product.

PRODUCTION – BASKETS

Baskets are mainly produced in North Lebanon. The baskets are made from a large native reed found in northern regions and wheat straw. Reeds are harvested once per year in April and must be dried in the sun for one week before use. It is common for a small group to gather the reeds and sell them in bundles to other craftspeople.

Reeds intended for baskets are ready to use after the drying stage. If reeds will be used for mats, they are soaked in water for a short amount of time to make them flexible.

After the reeds are dried, they are placed in small bundles and wool or silk is wrapped tightly around the bundle. The silk or wool is threaded through a large needle, and after a certain amount of wrapping is complete, the needle is sewn through the bundle to secure the wrapping. The wrapping and sewing continues in a circular form. This creates the base of the basket.

The basket grows as the bundle of reeds is twisted and coiled upon itself. Wool or silk is used to wrap coiled portions, which are interspersed with the bare twisted reeds. This creates a pattern within the basket, and reduces the amount of wool used, since wool is more costly than reed. Wool is also sewn in a pattern along the sides of the basket, again to secure the coils to one another.

Rugs are woven using a small rectangular horizontal frame, with the lengthwise reeds that hold the tension for the weaving are secured through holes in the frame. The filler reeds are then woven into the tension reeds in the frame.

FIGURE 7-BASKET PRODUCTION



MARKET CHANNELS – BASKETS

The production of baskets is commonly a rural activity done primarily by women. The women's basket making cooperative in Kwachra functions as a small enterprise with the women producing together. There are also an unknown number of independent producers. Craftspeople producing carved kitchen items sometimes also have female family members create a small amount of baskets and use the weaving technique for the seats of stools and chairs.

It is not as common for producers to have access to their own retail location. Basket producers do receive direct custom orders from restaurants and organizations. Producers commonly participate in local fairs and exhibitions. Baskets are also sold to, and presented on consignment in, secondary-sale artisanal stores. There is no official regional or international trade in baskets.

OPPORTUNITIES – BASKETS

There are three opportunities for LIVCD to work on Baskets

1. Increase production by assisting craftspeople in obtaining raw materials from new locations.
2. Increase sales by encouraging and assisting craftspeople to differentiate their products and add finishing elements.
3. Increase sales by identifying new retail locations in secondary sales locations and along tourism routes.

Opportunity 1: Many traditional locations for gathering reeds are on the border with Syria. These areas are now too dangerous for craftspeople to gather from. LIVCD can provide a large amount of support by identifying regional locations to import reeds from, or working with craftspeople to identify different raw materials to use in production.

Opportunity 2: Baskets serve a utilitarian purpose and have traditional appeal, but cannot compete in price with commercially produced imported products. Similar to carved kitchen items, these products need to be assessed for potential value-add design elements that will increase the value of the product. The goal of design interventions is to move the product away from a purely utilitarian function and add a modern decorative appeal that will prompt a consumer to purchase this hand crafted product instead of a more cheaply priced mass produced product.

FIGURE 8- BASKET WITH DESIGN SUPPORT



Opportunity 3: Traditional baskets can be found in Lebanon along the sea highway and in some specialized retail locations, but sales of well designed value-added baskets can be increased if producers can be linked with additional retail locations. High-end secondary sales locations and retail opportunities along tourism routes would provide a significant opportunity for producers to sell more products, and potentially expose their products to more custom order clients.

DECORATIVE STATUETTES AND ARABESQUE FURNITURE.

Decorative statuettes and Arabesque furniture are wood crafts that are currently being produced in Lebanon, but based on data gathered for this assessments there is little opportunity for LIVCD to work on these products. Decorative statuettes are small carved souvenir items, usually with a Lebanese theme such as a water jug. While carving is a traditional craft within Lebanon as evidenced by the carved kitchen items, the production of these types of statuette items is relatively modern. There is no utilitarian use for the items and they do not serve a purely decorative function outside of a tourism product. There are some carved cedar plaques that have an upgraded quality and are sold in the Cedar Reserve and at targeted tourism locations. These items may have potential in the craft market, but they can benefit from overall upgrading strategies and intersections that LIVCD may engage in, but do not warrant targeted interventions at this time.

Arabesque carved furniture refers to intricately carved screens and home items that were traditionally found in homes and political residences throughout Lebanon. Items were originally crafted from Cedar wood. These items have a deep tradition in Lebanon, but due to limited raw material resources, and the potential negative environmental effects raw material harvesting can have on Lebanese forest cover, specifically Cedar trees, it is not recommended that LIVCD focus on this craft. Additionally, both domestic and regional demand is moving away from intricately carved pieces and trending towards more modern furniture. There is a market for these products with European and American consumers, but very large interventions would be required to assist only a small number of furniture producers in this craft.

5. TEXTILES

The production of textiles in Lebanon is focused around small rural producers, with women playing an especially strong role. The types of textiles included in this analysis have traditional Lebanese heritage, serve a utilitarian purpose, and have tourism potential. Silk textiles have an especially unique tradition in Lebanon. Around 550 AD a Byzantine Emperor established silk production in Syria and Lebanon by smuggling silk worms from China. The tradition of silk creation in Lebanon continued through the 20th century. There continues to be a Silk Office within the Ministry of Agriculture but its future is uncertain.²

CROCHET

Crochet is form of handcrafted production that creates intricate products commonly used for table coverings, blankets, and shawls. Crochet is accomplished using a crochet hook and threads of a variety of materials. The crochet that is currently done in Lebanon has evolved from traditional techniques done throughout the world. Crochet is produced exclusively by women.

MARKET OVERVIEW- CROCHET

The total number of producers active in the market cannot be estimated. There are approximately 12 women displaying crochet on consignment at Maison De L'Artisan, but many more have submitted requests to display. There are also active cooperatives for crochet in South Lebanon, and likely many women throughout the country selling in local retail stores and fairs.

The domestic market for hand crochet products is small. Many families have a woman within the household that is producing crochet products for family use, and the demand, especially among younger generations, is small. Crochet products are expensive due to the large amount of time they require to produce, and these hand crafted products cannot compete with mass produced textiles.

There is a potential to market Lebanese crochet products to European consumers, both within Lebanon and possibly through opening new markets internationally. Hand crafted crochet has a respected tradition in Europe and the Lebanese product is less expensive than European produced products, largely due to lower labor costs.

PRODUCTION – CROCHET

Crochet in Lebanon generally uses wool in the production as opposed to cotton or synthetic yarns. The crocheted product is produced using a crochet hook to pull loops of wool yarn through other loops in numerous patterns, many of which are extremely complex and beautiful. The cost of each product will depend on the complexity of its pattern(s) and the size of the product.

² The Silk Museum, “The Origins of Silk and its Introduction to the Middle East”, (September 2008) http://www.thesilkmuseum.com/Education/History_en.html

FIGURE 9- CROCHET



MARKET CHANNELS – CROCHET

Crochet is produced primarily by individual women in their homes. It is commonly done to produce household items for the family's own use. Some craftspeople have joined together to form cooperatives and associations to better market and retail their products. Crochet is directly retailed at local fairs and exhibitions, and in some local retail shop locations. Local retail stores selling crochet usually have a number of different products from various craftspeople on consignment. These locations may also sell mass produced clothing, blankets, and tableware.

Secondary-sale artisanal locations sell crochet under consignment, but there are too many women producing a similar product and it is not successful in that setting. The cost of crochet is also high, and a common international craft, so it is not placed in many targeted tourism locations. There is no official data on regional or international trade in Lebanese crochet.

OPPORTUNITIES – CROCHET

There are three opportunities for LIVCD to work on Crochet:

1. Increase sales by assisting and encouraging craftspeople to differentiate their product and create new products and value add design elements.
2. Increase sales by helping producers access European consumers both domestically, regionally and internationally.
3. Increase sales and involve more producers in the market by linking crochet to targeted tourism locations.

Opportunity 1: A challenge with crochet is that it is produced within many families for household use, which reduces domestic demand. It is also a craft that is associated with an older Lebanese generation and it not valued by younger generations. There is an opportunity for LIVCD to improve the domestic sale of the product by assisting craftspeople to differentiate and upgrade products. Hand produced crochet products can have unique designs and have the potential to appeal to consumers if production focus is moved away from tableware and into clothing and other more modern products. It would also benefit individual craftspeople to add design and value-add elements that can differentiate their products from among those produced by other Lebanese craftspeople.

Opportunity 2: Crochet has a large appeal for European consumers and the crochet produced in Lebanon is high quality and produced at a lower price than European crochet. The crochet currently available in secondary-sale tourism locations is purchased primarily by European visitors. The sales of Lebanese crochet can be increased by linking producers with European markets and helping to establish a formal channel to retail products in international markets.

Opportunity 3: Crochet is sold in some tourism and secondary sale locations but there are too many producers, and these current sales points are saturated. Producers need to be linked to more retail locations along specialized tourism routes, and if products can be upgraded there is opportunity to sell the product in additional high-end secondary sale locations.

WEAVING

Weaving as a craft is commonly done on either vertical or horizontal looms and creates a more densely woven textile than crochet. Patterns are commonly Arabesque or depict modern Lebanese themes. Weaving, especially with silk, has a unique tradition with Lebanon due to the previously robust silk worm industry. Today most raw materials for loom weaving are imported. Weaving production uses traditional techniques, serves a utilitarian purpose, and has tourism potential. The types of products created include decorative table coverings, wall hangings and traditional Arab clothing.

MARKET OVERVIEW – WEAVING

The number of craftspeople engaged in weaving and the total retail value of annual production is difficult to estimate.

The domestic market for weaving is very small. It is impossible for hand-woven products to compete with mass produced textiles. Additionally, consumers looking for traditional creation and unique textiles can find lower priced products from Jordan, and previously Syria.

There used to be a market for Lebanese textiles in the GCC countries. Many people would place custom orders for multiple pieces, but with the recent tourism downturn these custom orders are no longer coming in.

PRODUCTION – WEAVING

Raw materials are imported from Europe and usually purchased through catalogues and textile distributors. Previously, it was common to purchase raw materials from Syria. The producer interviewed places raw material orders according to custom orders he receives.

Craftspeople thread raw silk or wool yarn through the edges of the loom and weave spools of yarn perpendicularly through the secured strings. Various colors are used to create patterns. Once a piece is started it cannot be taken off the loom until it is completed.

FIGURE 10-WEAVING



MARKET CHANNELS – WEAVING

The majority of textiles are directly retailed by craftspeople through custom orders. There are areas of Lebanon, such as Zouk, that are known for weaving and producers have storefront locations.

There is some consignment sale through secondary-locations and craftspeople participate in local fairs and exhibitions. There is no official regional or international trade in weaving.

Opportunities – Weaving

There are two opportunities for LIVCD to work on Weaving.

1. Increase sales by opening Middle East regional trade and retail markets.
2. Increase sales and producer income by linking weaving to targeted tourism locations.

Opportunity 1: The weaving that is currently being done in Lebanon is very high priced due to the cost of labor and raw materials, and it is difficult for it to compete domestically with mass produced clothing. There was previously a client base from Gulf Countries that would place large custom orders. With the recent downturn in tourism these clients are no longer seeking out Lebanese weaving. LIVCD has an opportunity to create linkages to the GCC market and give producers access to retail locations within those countries.

Opportunity 2: Sales of woven textiles can be increased by establishing more retail locations along tourism routes. Additionally, tourism packages can offer specialized visits to weavers, and tourists can actively engage with and learn about the craft. Tourism operators have offered to pay hourly rates to

craftspeople to participate in a tourism experience. This would create an additional source of income for craftspeople and introduce potential new clients to the product.

CARPETS AND EMBROIDERY

Carpets and Embroidery are two categories of textile craft that are currently being produced in Lebanon, but they do not entirely fit into the Handicraft set. Also, there is less opportunity to make an impact on these products. There is currently carpet production being done by women in the Aarsal region of Bekaa and embroidery is common throughout many regions of Lebanon.

Carpets are being produced using traditional techniques and they serve a utilitarian purpose, but the extreme regional competition in carpet-making as a craft makes the production unsustainable in Lebanon. Carpet producers must sell at a very high price due to the cost of labor and raw materials, but the quality of the product is not balanced with the price. Neighbors such as Turkey, Egypt and Jordan produce much more intricate traditional carpets at a lower price. The price of craft carpets in Lebanon is too high for domestic consumers and the product is too heavy, high-priced and simple to appeal to a tourism market.

Embroidery is a more modern technique that is retailed in local fairs and through secondary-sales points. The products have both a utilitarian and decorative use, and patterns sometimes have modern Lebanese themes. There may be potential to upgrade embroidery as a craft, but based on the analysis done by LIVCD the product does not capture Lebanese heritage in a significant way and cannot be differentiated from embroidery common throughout the world.

5. Pottery Pottery production has a deep history throughout the world, and Lebanon has an especially strong tradition from its Phoenician heritage to Roman influences. Multiple families were interviewed who utilized traditional pottery production techniques, with tools handed down within their families for generations. The analysis of pottery production focuses on two types of pottery: rock salt pottery, traditionally produced in the Assia region of Batroun, and standard pottery which is commonly produced throughout Lebanon. Overall pottery production preserves traditional techniques, serves utilitarian purposes, and has some tourism potential.

MARKET OVERVIEW- POTTERY

There are currently four families producing rock salt pottery in Assia, and multiple small enterprise workshops throughout Lebanon engaged in standard pottery production. The total retail value of annual production cannot be estimated because many items are sold through variable custom orders. Rock salt pottery is produced by women, while the producers of standard pottery are most commonly men.

The majority of the retail of rock salt pottery occurs through custom orders by restaurants. Pieces are also retailed in secondary-sale locations. Standard potters directly retail from their workshops, produce for custom orders, and retail in secondary-sale locations. Both rock salt and standard producers participate in local fairs and exhibitions.

PRODUCTION - POTTERY

Rock Salt Production

Soil with adequate clay content to be utilized for rock salt pottery is harvested from the local region. 3-4m² can be collected each hour. The craftspeople of Assia gather approximately 3-4 tons of this soil per year. All soil gathering is done by family labor.

After the soil is harvested it is mixed with water in a large pool. Through constant stirring of the water with the soil, the clay is filtered out and begins to collect at the bottom of the pool. After the mixture is stirred, the water is left to evaporate leaving the clay. This mixing and evaporation process may be repeated in multiple pools to fully sift clay apart from other mineral particles.

The clay is then mixed with rock salt, which is also harvested from the surrounding area. The rock salt acts as a binding and strengthening agent in the clay. The rock salt also makes this pottery tradition unique and desirable for cooking because it retains heat better than standard cooking vessels.

Clay is stored in a covered location for use throughout the year.

Rock salt pots are created entirely by hand. Traditional cooking shapes are formed from one block of clay. Handles are rolled and attached to the base form. After initial formation the pot is left to dry for one day, and is then smoothed using a stone. After smoothing, pots are left for a second day of drying. On the third day, excess wet clay is scraped off using hand tools, and the pot is smoothed again with stones. There is a fourth and final day of drying and smoothing, and then the pot is left undisturbed to dry for 10 more days. Excluding drying time, the total pot creation labor process takes 15 minutes for an experienced craft person.

No glaze is used on these pots, but the repeated stone polishing creates a smooth surface on the finished products prior to firing. A brick oven is then used to fire the pots. Approximately 1.5 hours are needed to fire 50 pots. 10% of pots break during the firing process. Firing is necessary to ensure the liquid holding capacity of the pots.

Standard Production

Standard pottery production differs only slightly from Rock Salt production. All steps of soil gathering and clay production are the same for both types, but rock salt is not added to the clay before molding.

Standard pottery production uses a foot powered potting wheel instead of forming pieces by hand, and the steps of scraping, smoothing and drying are not done. Utilizing a potting wheels allows the craftsperson to create a smooth finish with water and while molding. It is common for standard potters to use glaze on kitchen products. The final firing stage remains the same for both types of production.

FIGURE 11-ROCK SALT PRODUCTION





FIGURE 12-STANDARD PRODUCTION

COST OF PRODUCTION- POTTERY

The production and raw material gathering for rock salt pottery are entirely family labor based, and producers do not have good estimates of how much time is required for each process component. Therefore, the total labor for production is estimated for the cost table below. Standard pottery does have cost inputs, but similarly the amount of time and clay used per pot is not tracked by the producers.

For rock salt pottery approximately four tons of soil is harvested annually by families, which is reduced down to two tons of clay. Every 10kg of clay needs 5kg of rock salt. Rock salt is harvested from the local region by family and friends. One large plate takes 15 minutes of actual formation by a skilled craftsperson.

The producers do not pay for water or tools. Their firing ovens were built many years ago by the family. One fired batch loses 10% of production through breakage during firing, and burns 40-50 kg of wood. It takes an individual two hours to collect this amount of wood. At a maximum production level it would take three months to create 1,000 pieces.

Standard Pottery Production

Soil is purchased by the ton. One ton of soil reduces to 500 kg of clay.

One ton of clay can produce approximately 100 large pots.

MARKET CHANNELS- POTTERY

Rock salt production is done primarily by women in their homes. Pieces are sold through direct retail to visitors in Assia and through a secondary-sale location. Producers receive custom orders from restaurants and they often participate in local fairs and exhibitions.

Standard pottery is primarily done by individual men and small family enterprises throughout Lebanon. These producers usually have workshops and may also have access to a storefront location, or retail directly from their workshop. There is some retail and consignment of standard pottery to secondary-sale locations. There is no regional or international trade in either type of pottery production.

OPPORTUNITIES- POTTERY

There are three opportunities for LIVCD to work in pottery.

1. Increase sales by encouraging craftspeople to create new products and add finishing and value-added elements to products.
2. Increase sales by improving marketing and knowledge of the traditional product, and linking producers with custom order clients such as restaurants.
3. Increase sales by linking producers to new retail locations and new retail opportunities along tourism routes.

Opportunity 1: The two types of pottery produced in Lebanon, rock salt and standard, could achieve improved sales by adding finishing elements and value-added design to the products. Standard pottery is not commonly glazed or painted. If producers can be linked with designers and move towards more unique decorative products, they will be better able to compete with mass produced vessels. Rock salt pottery is demanded primarily for its domestic utilitarian use, but producers can work towards new types of kitchen products and storage vessels that can appeal to restaurants and food industry clients.

Opportunity 2: There are some restaurants in Lebanon that are using rock salt pottery, but its unique heat storing property is not widely known. LIVCD can work to promote awareness and marketing within culinary circles both domestically and regionally to increase sales and create new custom order clients.

Opportunity 3: Both types of pottery are currently available in targeted tourism locations, but customizing the product to be unique to different geographic areas of Lebanon, and linking producers with retail opportunities along tourism routes, will increase sales. Pottery products can be customized to the cooking requirement of regional specialty dishes, and finishing elements such as painting and design can be used to represent traditional aspects of the region. There is an opportunity for pottery workshops to be included as a tourist destination in packaged tours due to the relatively short time needed to produce a piece and thereby permitting a real time interactive pottery production experience for tourists. Like the opportunity for weaving, an hourly tourism wage can be paid which would offer a secondary source of income for producers. Places such as Assia are also interested in opening cultural heritage museums which would offer further tourist attractions linked with pottery production.

CLAY SCULPTURE

There are craftspeople working in traditional clay sculpture. An in-depth analysis of clay sculpture is not included due to the small number of people working in it and the lack of utilitarian use and traditional production technique. Sculptors are producing representations of people and still-lives that reflect Lebanese heritage, and they can be assisted through many of the same upgrading strategies and intersections presented for the other pottery products.

6. SOAP

Soap produced in Lebanon is traditionally made from olive oil, and a small number of craftspeople produce laurel oil soap. Soap making is a traditional craft in Lebanon, and some historians believe that

chemists from Tripoli were the first to produce soap.³ Soap has a primarily utilitarian purpose, but can be carved into forms and used as a decorative product as well. Soaps are commonly scented and dyed. Laurel soap is traditional in rural southern areas of Lebanon and is produced from the Bay Laurel tree, or *Laurus nobilis*.

MARKET OVERVIEW- SOAP

The total number of soap producers in Lebanon is not known. Producers are usually independent and there are no known cooperatives or associations linking soap makers.

Soap making is well known within Lebanon, which creates a large domestic market. There is one producer who is selling products abroad but it is not common. There are good opportunities for soap to enter regional and international markets because of the unique properties of olive and laurel oil soap. Olive oil soap is ideal for sensitive skin and acts to hydrate as well as clean. Laurel soap has antiseptic properties and strong cleaning power.

PRODUCTION – SOAP

Pure Olive Oil Production

The boiling pots, molds and shaping tools for olive oil soap production are commonly handed down within families. Pure olive oil soap is produced by boiling a combination of olive oil, sea salt and water.

Craftspeople purchase barrels of last year's unsold olive oil directly from mills. Sea salt is purchased from the local market. Scents and dyes for the soap are also purchased locally.

Soap is made in batches. The amount in each batch can vary by the size of the boiling vessel available. The ratio of oil to water to salt is 4:2:1.

The ingredients are combined in a large metal cooking vessel. Some of these are custom made and are on a frame with hinges so it can be tipped and poured. Ingredients are boiled with constant stirring for six hours.

Scents and dye are added during the cooking stage. Many producers are using synthetic chemical scents and dyes.

After boiling, the soap is poured into a large rectangular mold and left to dry for one day.

After drying, the entire block of soap is removed from the mold and cut into small squares. Small squares are polished and sold directly. Larger squares can be cut and then shaped into balls. Pieces are also carved into intricate shapes such as flowers and fruit.

³ Tripoli City, "Handicrafts in Tripoli Lebanon" (November 2009), <http://www.tripoli-city.org/handicraft.html>

FIGURE 13- OLIVE OIL SOAP



Laurel Oil Production

The Bay Laurel tree, or *Laurus nobilis*, grows naturally in Mediterranean regions. Clusters of flower buds, containing large seeds, are harvested from the Bay Laurel trees in October. The flower bunches grow close together and are difficult to harvest. It takes four hours to gather enough seeds for 1kg of oil.

Seeds are boiled in water for 24 hours. After 24 hours, the seeds are stirred, and then left to boil for another 24 hours. As a result of the boiling process, the oil rises to the top of the water and is skimmed off.

After the oil is produced from the seeds, it is mixed in a large pot with a caustic solution, sodium hydroxide, commonly referred to as lye. The caustic solution produces a chemical reaction with the oil, converting it to soap. The ratio for this process is 16kg oil : 9kg water : 3kg caustic solution. The mixture is stirred without heat for one hour until it becomes solid and can no longer be stirred. The mixture is then put over heat and stirred for another hour. After re-heating, the mixture is poured into a mold and left to solidify. After it has solidified, the soap can be cut into squares and is ready for retail.

The production process for 50/50 olive oil and Laurel oil mixtures, and 50/50 mixtures with the addition of honey, is virtually the same as the production of the pure soaps described above.

MARKET CHANNELS- SOAP

The production of olive oil soap occurs throughout Lebanon and the technique and tools are passed down within families. Laurel oil soap is primarily a rural women's activity that is also passed down within families. Families often work together in both olive and laurel oil soap for a small enterprise level of production.

Soap is sold through direct retail from homes and workshops, and in storefront locations. There are some custom orders for soap, but it is not as common as custom orders for other craft products.

There is a large flow of soap from producers to secondary-sale artisanal stores. Stores usually put in orders for the stock of product they would like. Consignment is not as common for soap. Craftspeople engaged in soap production commonly participate in local fairs and exhibitions.

There is also soap available in targeted tourism locations,. There is no official regional or international trade in soap.

OPPORTUNITIES- SOAP

There are three opportunities for LIVCD to work on Soap.

1. Increase demand for the product by upgrading finishing elements and encouraging the use of natural input supplies.
2. Increase international demand for the product by creating targeted marketing around the skin-care benefits of Lebanese soap and opening new trade linkages and retail opportunities outside of Lebanon.
3. Increase sales by linking producers to retail locations along tourism routes.

Opportunity 1: The soap that is currently being produced and sold in Lebanon has natural elements. There is some value-added design in the finished product. Natural elements and added-value are good, but demand can be increased by improving the product. Producers currently use either pure olive oil or pure Laurel oil, but many synthetic dyes and scents are used. The skin care benefits of natural soap are being negated by chemical additions. Producers should be encouraged to focus on all natural production and promote that in their marketing. Some finishing elements such as stamping, shaping, and packaging finished soap products are currently being done, but they are relatively basic and do not enhance the quality of the product. Soap producers can be linked to value-added designers and packaging experts that can further develop sales through improving these finishing details.

Opportunity 2: Lebanese soap has large potential in regional and international markets due to the natural oils and unique skincare properties. In conjunction with Opportunity 1, targeted marketing and information campaigns in new markets will expose potential consumers to the high-quality properties of Lebanese soap. As international recognition of the product increases new retail opportunities can be investigated. There are some producers that are selling olive oil soap in the GCC market but it is not common. LIVCD has an opportunity to greatly increase sales by opening trade channels and retail markets in Gulf Countries and marketing the product through mid-east regional exhibitions. There may be opportunity in international markets outside the mid-east as well, but olive oil soap is already well known in mid-east regional markets, creating a more immediate opportunity.

Opportunity 4: Similarly to pottery, soap is being sold in tourism locations, but sales can be improved by integrating it more deeply into targeted tourism routes and tour packages. Soap shaping and finishing can be an interactive tourism product and experience, and finding hotels that will custom order the soap products and provide them to guests, along with corresponding information regarding the unique health properties, can further expand market demand and revenue. As market demand for Lebanese soap expands there is already ability for production to expand as well. LIVCD has identified a large olive oil producer who is interested in participating in soap making and can be integrated into the sector.

7. CUTLERY

The creation of cutlery as a Lebanese handicraft is regionally focused in the Jezzine area. The first craftsman working in the craft is thought to have begun in 1770 and most producers are third and fourth generation craftspeople.⁴ Craftspeople originally carved cutlery handles out of animal horn and attached them to metal utensil stock. Jezzine cutlery is now primarily produced with molded plastic handles, with craftspeople adding decorative patterns and embellishments to these handles. The cutlery craft is well known throughout Lebanon.

MARKET OVERVIEW- CUTLERY

There are approximately 22 craftspeople currently working in cutlery. There are seven craftspeople with companies registered with the Chamber of Commerce in South Lebanon. The seven registered producers also have retail locations.⁵ Cutlery producers are primarily male.

According to a study conducted by the Union of Municipalities of Jezzine, in 2007 an estimated retail value of between USD 8,000 and USD 12,000 of cutlery was produced and sold,

There is also a cutlery cooperative which has 12 members. The cooperative is not very active and mostly is used to aggregate bulk material purchases and search for potential marketing opportunities. Some cutlery craftspeople also create cutlery display boxes and mold the basic molded plastic handle, which generates additional revenue.

Cutlery has an established Lebanese identity which creates market potential. , Domestic consumers are already knowledgeable about the product. Despite this, the cutlery industry continues to struggle due to a lack of active organization and marketing.

PRODUCTION- CUTLERY

Cutlery was traditionally carved by craftspeople out of large imported horns. Water buffalo horn from India was commonly used, and five pieces could be carved out of one horn. Horn imports became prohibitively expensive and craftspeople switched to molded plastic forms to produce the cutlery handles.

Goat and sheep horn can be used to produce cutlery now, but it is much more time consuming to carve, and only one craftsman is producing in this traditional method.

The cooperative for cutlery in Jezzine assisted two craftspeople in commissioning plastic handle molds of three sizes. The molds are large and can create 12 pieces at a time. These plastic molds form simple black plastic shapes that have a birdlike form.

Diagonal embellishments are created in the molded plastic handles by sawing into the molded plastic handles in various diagonal patterns, and inserting thin aluminum ribbon into the grooves that were created by the sawing. Excess aluminum is cut off and sanded until flush with the form.

4 Union of Municipalities of Jezzine “Le Design Du Project De La Rehabilitation De La Coutellerie De Jezzine – Liban”, Nombre Pg. 3

5 Union of Municipalities of Jezzine “Le Design Du Project De La Rehabilitation De La Coutellerie De Jezzine – Liban”, Anciennete Pg. 3

Colored dots are created in the handles by drilling holes into the molded plastic handles and inserting colored plastic sticks. Excess of the plastic stick is cut off and sanded until flush.

Metal wings for the bird form handles are purchased pre-fabricated from Beirut. To attach the wings to the handle, a hole is drilled through the entire body of the plastic handle. A nail is inserted through pre-punched holes in the metal wings and into the body. The nails are then filed flush with the form.

A comb is created for the bird handles using sheets of red plastic that are cut in a rounded shape. A notch is sawed into the top of the bird and a red plastic piece is glued in place. Using a file, the red plastic piece is shaped and filed to achieve a comb like appearance.

After all components of the bird have been assembled, the handle is ready to be affixed to manufactured metal utensil stock. Metal utensil stock used by cutlery craftsmen varies in quality. In 2003, an Italian Association gave the Cutlery Cooperative USD 50,000 worth of high quality stainless steel utensil stock. These were originally distributed to members of the cooperative. Craftsmen can now purchase high quality stainless steel utensil stock from Italy. Lower quality stainless steel utensil stock can be purchased from local shops, or many times craftsmen cut the utensil stock from imported Chinese cutlery.

To affix the handles to the utensil stock, a hole is drilled in the base of the bird, slightly smaller than the base end of the utensil. The utensil base is then heated over a burner until red hot, and inserted quickly into the plastic base. The cutlery is then quickly submerged in cold water. This allows the plastic to expand to accept the utensil base and quickly shrink to permanently hold it in place. For lower quality utensil bases craftsmen put a small washer around the base where the bird meets the utensil to create a finished look. Higher quality utensil bases have a ledge that creates a finished look when inserted in the bird handle.

After the utensil stock is affixed, the bird handle is sanded and polished. Polishing is done using two types of specialized polishing soap and a large two-sided polishing machine.

Craftsmen create their own unique signature on the bird by adding specialized filing and notching to the comb, wings and body of the bird. Unique patterns are also created such as the Lebanese Flag on the body of the bird.

Box Production

There are some craftsmen who also produce the boxes used to display, and sell with, the cutlery. They sell these boxes to other craftspeople. Box craftsmen have set dimensions for each size of display box. Tag board is used for the top and bottom of the box, and thicker wood scrapes are used to create the frame. Wood is purchased from a lumberyard in Beirut.

Glue and small nails are used to create a fully enclosed box, which is then sawn in half. The outside of the top and bottom of the box is then covered, using glue, with black vinyl paper. An extra layer of vinyl is placed along one side to create a hinge for the box.

Red or pink felt is used to cover the inside of each box, and decorative red and gold string is placed around the edges of the box. Holding pieces are made out of felt and glued to the inside of the box. Clasps are affixed to the outside of the box.

FIGURE 14- JEZZINE CUTLERY



MARKET CHANNELS- CUTLERY

Cutlery is exclusively produced in the Jezzine area. Craftspeople tend to have small workshops within and around their homes. Seven craftspeople have retail locations along the main market street of Jezzine. Others sell through custom orders, and also specialize in, and sell components of the final product to other cutlery producers.

In 2007, there were seven boutique markets re-selling cutlery outside of Jezzine. Cutlery craftspeople participate in local fairs and exhibitions.

Opportunities- Cutlery

There are four opportunities for LIVCD to work on Cutlery

1. Increase net revenue by assisting the cutlery cooperative and the Union of Municipalities of Jezzine in utilizing its advantage as a group to aggregate and transport input items for production.
2. Increase net revenue by linking Lebanese cutlery producers with craftspeople active in Engraving and Stamping on metal as defined by the LIVCD Analysis.
3. Improve sales by opening new international markets.
4. Potentially increase net revenues and Middle East regional and international sales by encouraging a return to the traditional technique of carved horn cutlery utilizing readily available goat and sheep horn.

Opportunity 1: The cooperative for cutlery has linked producers to input material providers previously, and is semi-active in searching for new opportunities, but the organization can be revived and more resources devoted to establishing consistent input material supplies. Producers are commonly negotiating their own purchases of input supplies and using their own resources to transport products from Beirut. The cooperative can establish a system for bulk purchase and distribution that will streamline production, and could provide an additional role and source of income for some producers, similar to producers who engage in plastic molding and box production. The Union of Municipalities of Jezzine is also engaged in the cutlery sector and is a group resource that can be leveraged.

Opportunity 2: Cutlery producers are currently importing the utensil stock for their products, purchasing low quality commercially produced utensil stock, or cutting them off of Chinese products. As described in the metal section of the Handicraft Analysis, there are many small enterprise and individual metal craftspeople active in Lebanon that have the potential to provide this element to cutlery producers. Other metal craftspeople in Lebanon have the machinery in place and resources for importing steel to produce metal utensil bases. If the two industries can work together to design quality products that can be produced at a competitive price both sets of craftspeople will benefit.

Opportunity 3: Lebanese cutlery has been successfully shown in international exhibitions, but craftspeople do not currently have the resources to attend these exhibitions, and international demand has decreased with the decline in tourism. Based on the 2007 study on cutlery, cutlery was purchased mainly by European and international customers, with little demand from regional Arab consumers. LIVCD can help to re-link producers with the international, specifically European, exhibitions and retail markets.

Opportunity 4: There may be an opportunity for cutlery craftspeople to add a unique value to their product by going back to carving handles from readily available goat and sheep horn. This would differentiate their product from anything that is commercially produced with plastic handles and an analysis is recommended to assess the potential demand for this upgrade. The added cost to produce these items will be balanced by the increased value and uniqueness. demonstrates the additional net revenue that can be achieved using goat and sheep horn.

8. OTHER CRAFTS

The LIVCD analysis has created the category of Other Crafts to discuss the production of glass blowing and mosaics. While these crafts are an ancient tradition in Lebanon, currently there are only a small number of craftspeople active in the market.

GLASS BLOWING

Glass blowing refers to the craft of blowing air through pipes into molten glass to create hollow objects. The technique is thought to have been invented by the Phoenicians along the coast of Lebanon and the surrounding regions. Products currently produced in Lebanon include water jars, vases, oil holders, coffee and cup sets, candle holders, and decorative objects. These objects are created using historical techniques, serve utilitarian purposes, and have both large potential as decorative items and in the tourism market.

MARKET OVERVIEW – GLASS BLOWING

There is currently only one active producer of blown glass in Lebanon. This producer has also significantly downsized his production as a result of decreased demand and rising fuel costs.

Glass crafts are beautiful products that have potential in both domestic and regional markets. The greatest challenge in the market for hand blown glass is competition from large quantities of mass produced imports. These mass produced products are significantly less expensive, and craftspeople are unable to compete with them for domestic demand.

PRODUCTION – GLASS BLOWING

Glass was traditionally produced out of sand, but it is now produced by re-melting recycled glass.

The glass furnace was custom built. It is a large brick structure with specialized internal compartments in which multiple colors of glass can be melted at once without mixing, and includes an oven compartment above the furnace that extends 6ft in length to slowly cool completed glass pieces. A machine is used to constantly blow fuel (diesel) into the side of the furnace.

In order to achieve a high enough temperature within the furnace, fuel must be constantly fed into it for 48 hours prior to beginning production. Due to the large preparation and amount of fuel needed, the workshop is currently only producing glass for 10 days every three months. The furnace must be tended constantly during these 10 days so the family takes turns and production is constant for 24 hours/day. 400 liters of fuel are consumed every 24 hours.

Once the furnace is 1200 degrees Celsius, glass is poured into the compartments, and left until the furnace reaches 1400 c. Glass takes 10-15 minutes to melt, and can be used for blowing within 1-2 hours.

Dye is added directly to the furnace to create blue and green colors. Brown is created by melting Al-Maza beer bottles. Red color is painted onto already completed pieces.

As the glass melts in the compartments, residue slowly collects on the surface. As glass is being blown a producer must intermittently scoop this residue off.

Long metal pipes are placed into the melted glass and glass is wound around the ends of the pipes. The glass coated pipe is then used to grab a second amount of melted glass and the craftsperson begins to blow through the pipe expanding the molten glass. Different techniques are utilized to vary the shape of the pieces. The pipe can be spun to elongate the piece; and tongs and various tools can be used to pinch off certain portions of the piece and attach elements such as glass bases and glassware stems. To fuse glass elements such as bases and handles, the base piece is pinched off and left near the furnace, while the additional element is created. The additional element is then placed onto the base piece in the desired location with tongs and the complete piece is inserted whole into the furnace to fully fuse the base with the added element.

A cracked glass effect is created by quickly dipping glass pieces into cold water and then immediately placing them back into the furnace. Embellishments and colored additions are created by dipping into various compartments of colored glass.

A custom made cutting machine is used to create drinking glasses. The end of a freshly blown piece is cleanly removed and the edges rounded smooth while the piece is still hot.

Once glass products are completed, they must be cooled slowly. Pieces are placed in the first of five compartments within the upper oven. The area directly above the furnace maintains a temperature of 500 c. Every hour pieces are moved further down the oven. Each section decreases in temperature by 100 c.

After glass pieces have gone through the entire cooling process in the cooling compartments, they are cooled at the outside temperature, and then cleaned and wrapped, or displayed for retail.

FIGURE 15- GLASS BLOWING



MARKET CHANNELS – GLASS BLOWING

The one active producer in Lebanon is based in Sarafand. There were originally glass blowers in Tripoli but they are not currently producing. The workshop in Sarafand acts as a small enterprise and the entire family is engaged in production. They have an established workshop and a retail location. There are six family members working in production.

The family sells a large volume of glass products retail through custom orders. The producer also sells to high-end secondary sales locations, as well as wedding supply stores. The craft shop is well known domestically but there is no regional or international trade.

Mosaic

Mosaic refers to the handicraft of creating designs through arranging and adhering small pieces of cut glass, stone or ceramic pieces onto a surface. Products created from this technique can have utilitarian uses such as vases, but it is primarily a decorative craft. The craft is thought to have originated in Mesopotamia but it is most commonly associated with Roman history. Lebanon retains a number of historic mosaics preserved from the Roman era.

Market Overview – Mosaic

It is not known how many craftspeople are active in mosaic. One producer was interviewed for the analysis, but it is currently most common for mosaics to be machine produced on a mass scale.

The mosaic craftsperson sells through custom orders and does not retail at local fairs and exhibitions, or in secondary-sale locations.

Production – Mosaic

Mosaic production uses glass, stone and ceramic pieces. These may be purchased, or found as pre-cut discarded pieces from stone workers and tile companies, or the craftsperson may cut the pieces themselves.

A base is needed to arrange cut pieces on. Vases, boxes and plain slabs are purchased as bases, or discarded pieces of stone can be cut into bases.

Mosaic pieces are glued directly onto the base, or a screen can be placed over the base and tiles glued onto it.

The entire mosaic work is then covered in stucco to fill in the gaps between the small mosaic pieces, and the excess stucco is wiped off the surface of the tiles. Coloring is sometimes used in the stucco to vary the color of the finished product. After the stucco is dried, the piece undergoes a final cleaning and is then ready for sale.

FIGURE 16- MOSAIC



MARKET CHANNELS – MOSAIC

The majority of mosaic production in Lebanon is currently occurring on a mass scale that does not fit within the LIVCD definition of Handicrafts. There are only a few independent craftspeople currently producing mosaic.

Mosaic craftspeople engage in direct retail through custom orders and some may participate in local fairs and exhibitions. It is not common for a mosaic craftspeople to have access to a storefront location. Fairs and exhibitions are difficult for mosaic producers to attend because of the large and heavy nature of the product, and the high retail cost of the product. There is little reselling or consignment of mosaic in secondary sales locations.

OPPORTUNITIES – GLASS BLOWING AND MOSAIC

Due to the very small number of producers currently engaged in these two crafts, LIVCD does not recommend interventions that are specific to glass blowing or mosaic. The Sarafand producer is well known and has established strong connections with custom order clients, secondary-sales locations and tourism organizations. The sales of blown glass will improve as tourism improves within Lebanon. There is some opportunity to involve more people, specifically women, in mosaic production. During the analysis of the Handicraft sector, the LIVCD team met with a commercial stone producer who is

interested in providing discarded products to mosaic craftspeople at little or no charge. There is also an artist who is initiating a project to use mosaic as a therapeutic and revenue generating craft for disadvantaged and abused women. Both glass blowing and mosaic production will benefit from overall upgrading strategies and intersections within the craft sector.

9. CONCLUSION

LIVCD has identified six overarching opportunities that can upgrade the handicraft sector and link closely with the Tourism Value Chain. In addition to broad sector strategies each craft has a unique set of challenges that can be addressed through targeted interventions. Lebanon has rich cultural traditions and this heritage often passes from one generation to the next through the teaching of handicrafts. Through LIVCD's focus on handicrafts that preserve Lebanon's rich and complex history, there is the opportunity to enhance the livelihoods of rural and marginalized households.

ANNEX 1: CRAFT DISTRIBUTION BY REGION

| Type of goods | Copper metal handicrafts (%) | Other metal handicrafts (%) | Bamboo & straw handicrafts (%) | Wood & mosaic handicrafts (%) | Pottery handicrafts (%) | Textile handicrafts (%) | Other handicrafts (soap) (%) |
|----------------|------------------------------|-----------------------------|--------------------------------|-------------------------------|-------------------------|-------------------------|------------------------------|
| District/ Caza | | | | | | | |
| Beirut | 11.3 | 7.1 | 7.1 | 18.8 | 13.8 | 56.7 | 1.7 |
| Baabda | 2.4 | 0.6 | 1.8 | 4.6 | 2.4 | 74.0 | 0.9 |
| Metn | 3.3 | 3.8 | 0.0 | 4.7 | 2.8 | 56.8 | 0.5 |
| Shouf | 2.5 | 1.0 | 9.3 | 7.2 | 1.3 | 77.6 | 5.8 |
| Aley | 0.6 | 0.8 | 2.2 | 5.2 | 1.2 | 81.2 | 3.3 |
| Keserwan | 1.2 | 0.6 | 1.9 | 7.4 | 3.1 | 67.3 | 0.6 |
| Jbeil | 0.0 | 0.0 | 5.2 | 1.7 | 1.7 | 47.4 | 6.0 |
| Triopli | 12.1 | 2.8 | 4.7 | 22.4 | 1.4 | 26.6 | 2.3 |
| Koura | 3.1 | 0.0 | 0.0 | 4.6 | 0.0 | 47.7 | 21.5 |
| Zghorta | 0.8 | 0.0 | 21.0 | 1.7 | 0.8 | 37.8 | 10.1 |
| Batroun | 0.9 | 2.8 | 5.5 | 6.0 | 2.8 | 71.0 | 2.3 |
| Akkar | 1.2 | 0.5 | 13.2 | 9.0 | 0.7 | 52.5 | 3.3 |
| Becharre | 5.0 | 2.5 | 2.5 | 20.0 | 5.0 | 55.0 | 0.0 |
| Al Meniya | 0.0 | 0.0 | 6.0 | 11.3 | 3.3 | 46.7 | 2.0 |
| Zahle | 0.5 | 0.0 | 2.4 | 4.8 | 0.5 | 66.3 | 0.0 |
| West Bekaa | 1.2 | 0.0 | 10.6 | 5.9 | 0.6 | 47.1 | 4.1 |
| Baalbeck | 0.5 | 0.5 | 4.3 | 3.6 | 0.2 | 69.2 | 0.1 |
| Hermel | 0.0 | 0.0 | 7.5 | 6.3 | 1.3 | 87.5 | 0.0 |
| Rachaya | 0.4 | 0.4 | 5.0 | 2.1 | 0.0 | 57.1 | 2.9 |
| Saida | 0.0 | 1.0 | 21.0 | 4.0 | 4.0 | 17.0 | 10.0 |
| Tyr | 3.9 | 1.3 | 10.5 | 19.7 | 5.3 | 42.1 | 0.0 |
| Jezzine | 0.0 | 24.1 | 0.0 | 6.9 | 0.0 | 41.4 | 13.8 |
| Nabatiyeh | 15.8 | 10.5 | 26.3 | 26.3 | 5.3 | 26.3 | 10.5 |
| Bent Jbeil | 5.2 | 1.7 | 29.3 | 48.3 | 12.1 | 65.5 | 20.7 |
| Marjeeyoun | 3.1 | 3.1 | 12.5 | 12.5 | 18.8 | 62.5 | 6.3 |
| Hasbaya | 0.7 | 0.0 | 0.0 | 2.2 | 1.4 | 68.1 | 9.4 |