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THE GAMBIA
HANDICRAFT SECTOR ASSESSMENT
WITH RECOMMENDATIONS & ACTION PLAN

Final Report

September 1993

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HANDICRAFT SECTOR ASSESSMENT

WITH RECOMMENDATIONS & ACTION PLAN

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For the Ministry of Trade, Industry and Employment
and USAID/Banjul with the participation of AFR/ONI/PSD

Final Report

September 1993

EXECUTIVE SUMMARY

The Gambia has a fledgling handicrafts industry that includes artisans involved in the production of wood carvings, batiks, tie-dye fabrics, dolls, dresses and shirts, leather goods and cloth/rug weaving. With a few exceptions, the quality of these items is generally poor and there is need to expand the market. The majority of handicraft artisans are small scale operators who derive most of their income from The Gambia's tourist industry. Women comprise a significant portion of handicraft artisans. Many of them produce tie-dyed fabric that is used to make clothing and home accessories. A few operate their own stalls at tourists markets but the majority produce and sell directly to other vendors. Some handicraft artisans have received assistance in the past from the Government of The Gambia (GOTG) and international donors/NGOs. Although handicraft development has been given some attention in the past, many have expressed interest in assessing the sector and formulating a strategy to assist in the development of the handicraft sector.

There are two basic types of handicrafts produced in The Gambia. One type is for local consumption, often in rural areas, and the other is for the tourist market or for export. An example of the former are the rough clay pots which are used as containers for water, incense, food and other items around the house. Another is the traditional woven cotton cloth which is used as a wedding shawl or to wrap the body for funerals in rural areas near Basse. The second type of handicraft is found in abundance at the tourist markets around the major hotels and in Banjul. These consist of items often found in tourist markets in other parts of Africa and the world. This report will concern itself mainly with the second type of handicrafts.

A list of the principal handicrafts sold in the tourist markets is as follows:

- woodcarving (masks, canes, figurines - human and animal)
- batik (wallhangings, material, clothing)
- tie-dye (material, clothing, tablecloths, napkins)
- embroidered and printed dresses and shirts
- woven cotton cloth (traditional and modern)
- leatherwork (bags, wallets, sandals, bottle coverings)
- jewelry (silver & gold)
- baskets (mostly made of palm leaf)
- dolls (with tribal dress)
- pottery (crude pots and bowls)
- beachbags & beach wraps (generally using printed material)
- paintings of local scenes (oil, watercolor & sand)

Most of the handicrafts produced use traditional styles. Some larger producers and exporters have incorporated Western designs

and styles into their products, but the large majority continue to make their crafts in much the same manner as they have for many years. There may be some variance on the types of products sold, due to changing tourist demands or to copying a product or style that a competitor is successfully selling. However, there appears to be very few conscious attempts to systematically adapt a product to a particular market, either tourist or overseas. Gena Bess appears to be the sole batik maker who has attempted to introduce modern designs to appeal to a higher-paying clientele. Suelle Nachif, a Lebanese Gambian who was a former buyer and designer for some large fashion houses in Europe and America, also has introduced some unique designs using African motifs on western-styled clothes. He works with some artisans who are willing to adapt their designs and sells these items from an attractive boutique above his hairdressing salon.

The general quality of most Gambian handicrafts is poor, although there are some exceptions. The problems with the quality of the handicrafts are due mainly to the primitive technology being used to make the products and the lack of quality control measures. Inputs can be a problem in some instances, such as the poor quality of leather found in The Gambia; however, shortages or unavailability of inputs do not seem to constitute a major problem for most handicrafts. The openness of the Gambian market to imports permits Gambians access to quality materials, provided they can afford them.

Training and technical assistance is needed principally in three areas - product design and adaptation, quality control tied to market requirements, and assistance in making long-term linkages with buyers overseas. Assistance in making market linkages and adapting product design to meet particular markets can be provided by experts from outside The Gambia. However, it is important that local experts and persons with credibility with the artisans involved exercise the quality control and provide training in that area. This is usually done in the context of purchasing items made by artisans. A standard of quality is communicated to the artisan both by describing the standards sought and by refusing to purchase items which do not meet those standards. These same local experts are needed to help in translating product designs and adaptations into language and meanings comprehensible to local artisans. In fact, the larger operators who already exercise a degree of quality control could assist in training smaller producers to produce better quality items, provided that it would be in their economic interest to do so.

The existing markets for Gambian Handicrafts, in order of declining importance, are tourists, expatriates, Gambians and exports. The only apparent room for expansion of the tourist market is through higher added value to the handicrafts produced. Most expats have considerable disposable income and look for handicrafts typical of the country where they are living to give as gifts to friends and

relatives back home as well as to furnish their home. Shrewd producers of quality handicrafts will cultivate relationships with expats and locals who work for expat companies to encourage repeat sales and word-of-mouth recommendations to buy from them. This market is limited and has little prospects for expansion. It tends to be a more sophisticated market, however, and artisans with quality products can reap considerable rewards from this market. The Gambian or domestic market typically pays less than the tourist market and is less interested in non-functional items. Clothes are a good moneymaker with this group of consumers. The potential for expansion of this market is also minimal, since most locals already know the handicrafts produced and buy only those which fill their immediate needs. There is currently an excess of supply over demand. There might be some producers who are in great demand due to the quality of their handicrafts or their unique designs. But the general situation is that of saturation of the market with handicrafts.

The export market has the most potential for expansion of all four markets, but is relatively untouched by Gambian handicraft producers. From discussions with artisans and others in The Gambia, it appears that most Gambian exporters of handicrafts are producers who travel overseas with their products in the suitcases and try to sell them to retailers in the countries they visit. In one case, it seems that a local producer of batiks and tie-dyes received marketing assistance from the wife of a former ambassador to The Gambia who provided the linkage with some buyers in the her native country. Very few of the artisans interviewed had any experience with exports or even considered it as a viable alternative. Nevertheless, this is the only logical market toward which to gear an effort to expand the handicraft sector. This market has great potential, but also considerable pitfalls. The thrust should be to develop long-term linkages with importers of Gambian handicrafts. These should be both wholesalers and retailers.

It is important to note that, in conversations with Stateside importing organizations and retailers, The Gambia was not known for any unique type of handicrafts. One African clothes shop owner noted that The Gambia is known in West Africa for its excellent batiks and tie-dyed cloth. Others who had lived in The Gambia also made that comment. However, to persons without West African experience, The Gambia does not evoke any particular images relative to handicrafts. This has an impact on marketing Gambian products overseas, since one must begin to develop an image of Gambian crafts. This does not happen overnight; in fact, it takes years to establish such a product image. However, in the competition for export sales, Gambian products will suffer without some kind of competitive edge - whether it be in terms of uniqueness of product, low price or exceptional quality (or a combination of those factors).

The principal constraints on the export market for Gambian handicrafts are the general lack of experience in exports and lack of knowledge of the export market. In addition, handicrafts often require design modification to be appealing to consumers in other countries. In addition, it must be noted that exports must be competitively priced. Wholesalers and retailers of handicrafts in the U.S. charge a minimum of 100 to 200 per cent markup above the landed price of the goods in order to recoup their costs and make a reasonable profit. Therefore, the price charged the buyer overseas must be low enough to allow for a markup of that magnitude.

It is important to stress that any attempt to increase Gambian handicrafts exports will require a long-term effort to show results. It will not happen overnight. It takes time to develop linkages with overseas borrowers, to improve and adapt products, to train local artisans in quality control, to establish trust and confidence in both the artisans and the buyers, and, not least of all, for the institution building aspect of the private NGO so that it can provide the guidance and assistance needed for the sector as well as to promote exports. Any effort should be designed to be conducted over a period of at least two years and would consist of short-term training in The Gambia and the U.S. as well as visits by technical experts in specific handicrafts to help in product development and in the administration of exports.

Local artisans should receive training and assistance in market-driven product development and quality control. This training should take place in-country and be conducted by a U.S. contractor or PVO in conjunction with the local NGO promoting Gambian handicrafts. Visits to gift shows and trade fairs in the U.S. and Europe by staff of the NGO should be supported both to expose Gambian products to buyers and to permit staff of the NGO to get feedback on the products from buyers, to inspect other handicraft products from other countries to assess the competition and get ideas for products and product modification, and to help them to make contacts within the industry. In addition, visits should be made by the NGO staff and specific artisans to other African countries to view their handicraft industries and promotion activities. Possible countries to visit include Kenya, Botswana, Zimbabwe and Ghana. All of the training and technical assistance would be on a short-term basis and would be driven both by market requirements and by a training schedule established by the U.S. NGO providing the assistance.

ACKNOWLEDGEMENTS

This assessment of the handicraft sector in The Gambia could not have been performed without the assistance of a number of persons, both in The Gambia and in the U.S. I would first like to thank Barbara Jensen of USAID/Banjul for her coordination of this assignment from start to finish. Her interest in this area and knowledge of The Gambia helped me to better understand how to approach the subject and where to look for assistance in comprehending the working of the sector. Secondly, I would like to thank Ada Gaye of the Industrial Development Unit of the Ministry of Trade, Industry and Employment for her help in arranging for interviews with various persons who were either interested in the development of handicrafts in The Gambia or who were actively involved in the sector. Her able support in arranging for transportation and lodging for the trip to Basse to view rural crafts groups and her counsel on Gambian society and culture helped to round out this assessment with a more complete understanding of the sector. Thanks also go to Fred Witthans of USAID, Steve Wade of Nathan Associates, and Meri Ames of Peace Corps/Washington for their advice on potential sources of information or on particular aspects of Gambian industry which helped to improve this assessment.

I would also like to thank Doug Dirks of Self-Help in Akron, PA, Robert Chase and Lynn Quay of SERRV in New Windsor, MD, Carolyn Ramsey and Sheila Mooney of the Crafts Center in Washington, DC, Carolyn and George McKecuen of Watermark in Cambden, NC, Clare Brett Smith of Aid To Artisans of Farmingham, CT, and Sue Kilgore of Mission Traders for their cooperation and advice on product development and on the market for and import of craft products in the U.S.A. and for their interest in assisting to help to improve the prospects for Gambian handicrafts in the U.S.A.

In conclusion, I would like to thank all of the artisans and other persons interested in handicrafts in The Gambia who were interviewed about their particular craft or interest. Without their cooperation, this report could not have been made.

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1. INTRODUCTION

1.1 Background

The Gambia has a fledgling handicrafts industry that includes artisans involved in the production of wood carvings, batiks, tie-dye fabrics, dolls, dresses and shirts, leather goods and cloth/rug weaving. With a few exceptions, the quality of these items is generally poor and there is need to expand the market.

The Ministry of Trade, Industry, and Employment (MTIE) is the government institution that oversees the handicrafts sector. MTIE monitors the industry through its Industrial Development Unit. The majority of handicraft artisans are small scale operators who derive most of their income from The Gambia's tourist industry. Women comprise a significant portion of handicraft artisans. Many of them produce tie-dyed fabric that is used to make clothing and home accessories. A few operate their own stalls at tourists markets but the majority produce and sell directly to other vendors. Some handicraft artisans have received assistance in the past from the Government of The Gambia (GOTG) and international donors/NGOs. Although handicraft development has been given some attention in the past, many have expressed interest in assessing the sector and formulating a strategy to assist in the development of the handicraft sector.

For example, a rug and cloth weaving cooperative in Gambissara, Upper River District, has received assistance from the Indigenous Business Advisory Services (IBAS), a government agency which provides training, technical assistance and credit to small businesses, and from a Canadian NGO (CUSO) in the form of technical assistance and financial aid. Yet, the activity may soon flounder in the absence of a sound marketing strategy. The Gambian Artisans Marketing Cooperative (GAMCO), a subsidiary of IBAS, was established in 1978 to market Gambian crafts; but it appears to have suffered from an inability to adapt to changing market conditions as well as from the limitations of a government-funded agency engaged in the actual marketing of products produced by the private sector.

1.2 Purpose of this Assessment

MTIE officials approached USAID/Banjul for assistance in funding training programs for artisans. It is believed that there could be export potential for the industry if assistance is obtained both to improve the quality and design of handicrafts and to identify and make contacts with potential buyers overseas. Training and technical assistance are viewed as an effective means to make needed changes and improvements within the industry. MTIE is particularly concerned about the poor quality of handicrafts that

are sold in The Gambia and would like to explore technological and production techniques that are employed in other countries experiencing success in producing and exporting handicraft items.

USAID/Banjul is interested in assisting the GOTG to explore the potential for the expansion of the handicraft sector. Consequently, this assessment was financed by A.I.D. to determine the potential for the expansion of the sector, through increased domestic markets and, particularly, through exports.

1.3 Methodology of the Assessment

Various organizations and retailers in the U.S. were contacted prior to the departure of the consultant for The Gambia. These organizations either provide marketing and technical assistance to artisans in developing countries or actually sell handicrafts. They were contacted to discuss potential markets for crafts produced in The Gambia and possible sources of technical assistance and training. The groups contacted included:

- Aid To Artisans, Farmingham, CT
- Watermark Association of Artisans, Camden, NC
- The Craft Center, Washington, DC
- SERRV, New Windsor, MD
- Pueblo to People, Houston, TX
- Self-Help, Akron, PA
- Mission Traders, Washington, DC
- Kobos African Clothes, Washington, DC
- Peace Corps/Africa Region

The methodology used in conducting the assessment in The Gambia was to interview artisans and crafts workers, staff of local training institutions, and promotional institutions. There was a dearth of studies on the handicraft sector in The Gambia, so the consultant had to rely on information obtained first-hand from artisans and organizations/institutions supporting the sector. Since most of the handicraft production and sales in The Gambia take place in Banjul and the nearby coastal resorts, field trips concentrated on that area. Nonetheless, a trip upriver to Basse was also made to view some of the artisans in rural areas, particularly the weavers in and near Gambissara. Artisans in various crafts were interviewed and products were inspected to determine the range of handicrafts produced and their quality. Seventeen days were spent in The Gambia conducting the assessment.

While the consultant was in The Gambia, he received and purchased samples of various types of Gambian handicrafts. Upon his return to the U.S., he revisited a number of the groups/organizations he had met with before his trip in order to have them evaluate the products he had brought back. Their comments have been incorporated into this final report, ~~and the specific comments of~~

~~each organization are found in Annex~~

1.4 Format of the Report

1.4.1 The following issues are addressed in the assessment:

- Types, styles and quality of handicrafts produced
- Technological and other constraints on quality and quantity
- Training and technical assistance needs of local handicraft producers
- Existing and potential participation of women in the sector
- Existing markets for handicrafts, both local and international
- Constraints on expansion of production and on domestic and international markets

1.4.2. Based on the assessment, this report makes recommendations to enhance the expansion of handicraft production in The Gambia including,

- Suggested training and technical assistance to improve the quality and production techniques of Gambian handicrafts and potential sources of assistance
- Potential marketing strategies to assist in the expansion of the market for Gambian handicrafts, both local and international, including potential distributors and importers to assist in the export of Gambian handicrafts

1.4.3 The last section of this report presents an Action Plan to implement the recommendations. The Action Plan includes:

- Policy and procedural recommendations for training, promotional activities, and essential equipment and supplies
- Target groups for training, types of training, duration, location and estimated costs.

2. ASSESSMENT OF THE GAMBIA HANDICRAFT SECTOR

2.1 Types, Styles and Quality of Handicrafts Produced and Potential for Expansion of Markets

2.1.1. Overview of the different types of handicrafts produced

There are two basic types of handicrafts produced in The Gambia. One type is for local consumption, often in rural areas, and the other is for the tourist market or for export. An example of the former are the rough clay pots which are used as containers for water, incense, food and other items around the house. Another is the traditional woven cotton cloth which is used as a wedding shawl or to wrap the body for funerals in rural areas near Basse. The second type of handicraft is found in abundance at the tourist markets around the major hotels and in Banjul. These consist of items often found in tourist markets in other parts of Africa and the world. This report will concern itself mainly with the second type of handicrafts.

A list of the principal handicrafts sold in the tourist markets is as follows:

- woodcarving (masks, canes, figurines - human and animal)
- batik (wallhangings, material, clothing)
- tie-dye (material, clothing, tablecloths, napkins)
- embroidered and printed dresses and shirts
- woven cotton cloth (traditional and modern)
- leatherwork (bags, wallets, sandals, bottle coverings)
- jewelry (silver & gold)
- baskets (mostly made of palm leaf)
- dolls (with tribal dress)
- pottery (crude pots and bowls)
- beachbags & beach wraps (generally using printed material)
- paintings of local scenes (oil, watercolor & sand)

Some items sold at markets are not made in The Gambia, but imported from other African countries, e.g., malachite figurines and jewelry, cloth from Senegal or Ivory Coast.

2.1.2. Styles of handicrafts

Most of the handicrafts produced use traditional styles. Some larger producers and exporters have incorporated Western designs and styles into their products, but the large majority continue to make their crafts in much the same manner as they have for many years. There may be some variance on the types of products sold, due to changing tourist demands or to copying a product or style that a competitor is successfully selling. However, there appears to be very few conscious attempts to systematically adapt a product to a particular market, either tourist or overseas. Gena Bes appears to be the sole batik maker who has attempted to introduce

modern designs to appeal to a higher-paying clientele. Suelle Nachif, a Lebanese Gambian who was a former buyer and designer for some large fashion houses in Europe and America, also has introduced some unique designs using African motifs on western-styled clothes. He works with some artisans who are willing to adapt their designs and sells these items from an attractive boutique above his hairdressing salon.

2.1.3. Quality of handicrafts

The general quality of most Gambian handicrafts is poor, although there are some exceptions. The problems with the quality of the handicrafts are due mainly to the primitive technology being used to make the products and the lack of quality control measures. Inputs can be a problem in some instances, such as the poor quality of leather found in The Gambia; however, shortages or unavailability of inputs do not seem to constitute a major problem for most handicrafts. The openness of the Gambian market to imports permits Gambians access to quality materials, provided they can afford them.

An analysis of the quality of the various types of handicrafts and the potential for their expansion is as follows:

Some of the larger batik makers and tie-dyers have good products through the use of colorfast dyes from Europe and through the use of quality control measures. The industry currently has two medium-scale producers, a few small-scale, full-time producers, and many microenterprises operating on a part-time basis. Since many make tie-dyed cloth and some batiks at home to generate supplemental income, the dyes they use often bleed on washing and their quality control is limited. The larger operations are better able to afford the more expensive, imported dyes and can pay more to artisans who do quality work. They may also have factory locations which have more space to make their products properly than the space available in homes. The batiks and tie-dyed cloth products appear to be the most promising for expansion, particularly for exports.

The majority of the jewelry made in The Gambia is made of silver and generally has filigree. Some goldsmithing is done, but the higher cost of gold limits this work due to the limited working capital funds available to most jewelers. Inputs are obtained either in the form of silver ingots, gold dust or scrap jewelry purchased from Gambians. Only the largest jeweler in The Gambia, I. B. M. Jobe in Banjul, has any modern equipment to fabricate a better product. Most jewelers are very small-time operators with a maximum of one or two relatives assisting them, with limited handtools and minimal working capital. Whereas the jewelers around Banjul and the tourist areas sell most of their jewelry to tourists, the jewelers in the interior sell mainly to Gambians and other West Africans traveling through The Gambia. Although the

filigree work could be better, the flat pieces surrounding the filigree are often rough and unpolished and detract from the work. Jewelers tend to come from certain families and the art is passed down from father to son. It was estimated by a prominent jeweler that of the approximately 30 jewelers in The Gambia, most were Senegalese. The quality of the silverwork is not bad and has potential for increased markets both in The Gambia and for exports.

The woven cloth produced by the Mama Jidda Society (also known as the Gambissara Weavers) on modern looms is quite good quality. The assistance they have received from various sources has helped to improve the quality of this product. Unfortunately, they are trying to sell it in bolts of cloth rather than as finished products. They have considerable inventory in stock and are having trouble selling the product. The cloth is very similar to the cloth woven by the indigenous Indians in Guatemala which is used to make tablecloths, tablemats and napkins which they market very successfully both to tourists and as exports. This woven cloth has potential to increase local sales to tourists if finished products were offered and some potential for exports, if the right buyer were found.

The traditional woven cloth is very bulky and woven in narrow strips which are then sewed together to make a larger piece. The quality of this cloth is rough and the market for this cloth is limited. Most sales are currently made to Gambians in rural areas. The Jimara Handicraft Association in Numuyel, Upper River District, makes this cloth. They have about ten weavers in the village, but only two do it full-time, due to the limited market for the product. They also have considerable stock on hand.

Woodcarving is a trade also dominated by Senegalese. Many of the woodcarvers located at the woodcarvers market in Brikama are Senegalese. They carve mainly teak and mahogany wood which they get from cutting down trees with the permission of the Forestry Department. They buy a license to cut down the trees in order to control deforestation. Interestingly, none of the woodcarvers interviewed complained about a lack of wood to carve. Unfortunately, the woodcarvers tend to carve mainly masks or figurines (often very large) of humans or animals; Some walking canes and wallhangings are also made. The quality of the carving and the finishing is not bad, considering the handtools with which they are working; but the market for increased woodcarvings of these types is limited. It would be better to have some other, more functional products made of wood which could be more appealing as gift items. The products made currently have some appeal to tourists, but have limited potential for exports. Although no one interviewed mentioned any particular problems with the quality of the wood, care must be taken to assure that wood products are insect-free if one is to export them. This is more of a problem with soft woods than with harder woods.

The paintings of village and natural scenes done in oil, watercolor or sand are a good value and, on the whole, quite well done. They are reasonably priced and make good souvenirs. Yet it is doubtful that they could make good exports. The exception could be the sandpaintings, if some of the motifs were changed from African village scenes and maps of Africa to other types of scenes or, even better, paintings of a variety of local birds in their natural colors.

The dolls made with different tribal dress are simple, but often attractive. The Kumasi dolls from Ghana, which are similar, have developed somewhat of a market in the U.S. These could also be a possible export product, providing a central purchasing agent could be identified who would exercise quality control measures when buying from the women making these dolls. One factor to consider with dolls, however, (particularly if one is discussing exports to the U.S.) is to make sure that none of the articles used in making the dolls could be dangerous to children.

The clothing made by the tailors and seamstresses is often of good quality and utilizes both locally produced tie-dyed cloth and batiks as well as imported printed cloth. The type of traditional African clothing produced, however, has appeal mainly to West Africans or tourists, although there is a small, but growing market for these products amongst African-Americans in the U.S. On the other hand, there are other countries, particularly in West Africa, which already have a corner on this market. It is difficult to see this market expanding much except in connection with promotion of more stylish batik and tie-dye garments. But, again, the world clothing market is one of the most competitive and it is difficult for small-time producers to really compete with the large producers from Asia and Latin America.

On the other hand, the beachbags and beachwraps are attractive and could have a possible market abroad if consistent quality control measures were applied. There is a considerable market for these types of items in the U.S. and the market for brightly colored beachtowels produced in developing countries has been growing. Most of the beachbags and beachwraps made in The Gambia use printed cloth from Senegal or Europe. The use of local batik or tie-dyed cloth could also make an attractive product in the U.S.

Baskets also have limited potential for expansion of markets due to the limited quality and quantities available in The Gambia and the highly competitive world market for baskets.

The quality of the leatherwork in The Gambia is appalling. Not only is the leather of poor quality, but the workmanship is very primitive. The problem of the lack of good quality leather was discussed in a report by Momodou Drammeh for UNDP in October 1992. In addition, discussions with him and with local artisans have revealed that the lack of basic cutting and sewing machines for

leatherworkers limits the quality of the work produced. This subsector has a long way to go to make a product that is appealing to tourists, much less to potential buyers overseas.

Likewise, the pottery industry has very little prospects of improving much in the near future. Although the Department of Community Development has a small program in Brikama and the Rural Development Institute (RDI) in Soma has some pottery wheels which are not currently being used, it is not difficult to teach people to use a pottery wheel and to make good-looking pottery. Likewise, a small modern kiln could be purchased to fire the pots properly and to be able to apply good glazes. Other African countries, e.g., Botswana, Kenya and Malawi, are currently producing good quality pottery for the local market (some tourist and some for local consumption). Another problem mentioned during field visits, however, is that the potters tend to be considered to be a lower class. This limits Gambians from taking an interest in pottery, according to some sources.

2.2 Technological and Other Constraints on Quality and Quantity

The key technological constraints on quality and quantity are the minimal use of basic machinery to produce Gambian handicrafts. As mentioned above, the leathercrafts producers could greatly improve their products through the use of some simple cutting and sewing machines. Likewise, only one jeweler in The Gambia has modern equipment for making jewelry. The rest of the jewelers travel to Dakar with their pieces of jewelry and pay the owners of the fabricating machines by the piece to embellish their handworked jewelry. The woodcarving industry could also benefit from the use of some basic machinery to produce a better finished piece of work. The woodcarvers could also diversify their products with better machinery which would allow them to make some more functional, but decorative products such as jewelry boxes. The use of machinery could also permit increased production due to faster production times. Increased quantities, however, are not desirable unless the market is there to buy them. Any attempts to increase production must go hand-in-hand with increasing the market for the products. The issue of the size of the market for Gambian handicrafts is discussed in sections 2.5. & 2.6 below.

A second constraint on quality is the lack of quality control. One views a number of handicrafts in The Gambia which have good design and are attractive, but which have no quality control. A good example is the beach bags. The bags are well designed incorporating sponge to give them firmness and shape and using brightly colored printed cloth to make them attractive. On the other hand, the sewing on the bags is often erratic with uneven bunching of the cloth between stitches and poor stitching itself. Likewise, the tie-dyed cloth tablecloths often have no sewn border or the sewing is of poor quality. Standardization of product design is evident in the markets and is often desirable, but unless

general quality control standards are raised, the potential for market expansion will be limited to a few of the larger operators who exercise the quality control required.

2.3 Training and Technical Assistance Needs of Local Handicraft Producers

Training and technical assistance is needed principally in three areas - product design and adaptation, quality control tied to market requirements, and assistance in making long-term linkages with buyers overseas. Handicrafts typically derive from the making of products which were traditionally made in certain countries or regions and which met the needs of the local market. In modern times, consumers buy handicrafts as gifts, souvenirs, curios, memorabilia and as examples of ancient simple or complex art. As a result, one must determine the potential market for a product and redesign it or adapt it to meet the requirements of that market.

Assistance in making market linkages and adapting product design to meet particular markets can be provided by experts from outside The Gambia; but it is important that local experts and persons with credibility with the artisans involved exercise the quality control and provide training in that area. This is usually done in the context of purchasing items made by artisans. A standard of quality is communicated to the artisan both by describing the standards sought and by refusing to purchase items which do not meet those standards. These same local experts are needed to help in translating product designs and adaptations into language and meanings comprehensible to local artisans. In fact, the larger operators who already exercise a degree of quality control could assist in training smaller producers to produce better quality items, provided that it would be in their economic interest to do so.

Visits to other countries by leading artisans to view how marketing and product adaptation is done in those countries could also be helpful to broaden their exposure to unknown techniques and business practices. It would be particularly helpful to take some Gambian artisans to visit countries with developed handicraft industries such as Kenya, Botswana, Zimbabwe or South Africa.

2.4 Existing and Potential Participation of Women in the Sector

Handicrafts in The Gambia seem to have certain subsectors dominated by women, some by men and others where both are active. Those dominated by women include batik and tie-dying, pottery, spinning thread and dollmaking. Those dominated by men include woodcarving, jewelry, weaving, painting and leatherwork. Sewing seems to be split between men and women, although the WID Project Director has the impression that men are starting to dominate in that subsector. The gender of vendors in tourist markets tend to reflect the dominance within each subsector.

The clear potential for increased expansion of women's participation in the handicraft sector appears to be in the area of batik and tie-dye and in the sewing of finished products from those materials as well as from woven and printed cloth. If the export marketing of Gambian dolls proves successful, dollmaking could also be an area with potential for expansion. Interestingly enough, it was surprising to see that weaving was dominated by men in The Gambia; in other countries, this is frequently dominated by women. It may be possible to expand women's participation in this subsector, if the market were to expand.

2.5 Existing Markets for Gambian Handicrafts, both Local and International

The existing markets for Gambian Handicrafts, in order of declining importance, are tourists, expatriates, Gambians and exports.

2.5.1. The tourist market is subject to the vicissitudes of global tourism. Figures from the Ministry of Tourism revealed that approximately fifty to sixty thousand tourists enter The Gambia each year. The great majority of them are British, comprising about 30,000/year of the tourists in the past five years. The German tourist trade has grown from about 2000 in 1988/89 to 8000 in 1991/92. French tourist trade declined from 7000 to less than 1000 over the past five years; whereas, Scandinavian tourists have stayed consistent at about 10,000 per year. The average length of stay is about 12 days and the average daily expenditure increased from slightly over Da200 in 1988/89 to about Da300 in 1991/92.

When one talks to artisans and tour operators, the general impression is that tourism is down. Some attribute the decline to the problems in the Casamance region in Senegal and others to a general depression in the economy of Europe. African-Americans are a specific American tourist market for The Gambia, due to the "Roots" phenomenon, a book and popular television mini-series written by the late Alex Haley who discovered that his ancestor, Kunte Kinteh, came from The Gambia. Tourism officials estimate African-Americans to comprise about eight to ten percent of the tourist market.

The potential for the expansion of the tourist market appears to be limited. Two particularly unique touristic aspects of The Gambia are the "Roots" phenomenon and the wide array of birdlife. Neither of these tourist groups are large enough to substantially increase the tourist industry in The Gambia. But while saying this, it is important to recognize that no one appears to have looked at the potential for increasing handicraft sales to these communities by designing products specifically for these tourists. For example, if woodcarvers were to start carving native birds and painting them in their natural colors, this could be a potential new product to tap the birdwatchers market.

Some individuals contacted expressed the opinion that the tourists coming by charter plane from Britain had less disposable income than some of the other tourists and, consequently, provided less of a potential market for handicrafts than other, more well-heeled tourists from other countries. No empirical data has been found to corroborate this impression, however.

In any case, the only apparent room for expansion of the tourist market is through higher added value to the handicrafts produced. One problem cited by vendors in tourist markets was the low prices paid by tourists for the handicrafts. Yet, if one compares the general quality of the Gambian handicrafts to handicrafts in other countries, they come up lacking. It is important to realize that there are different submarkets within the tourist market and that one can target different products to different subsets of the same market. If improved products were developed, both from the standpoint of design and quality control, it might be possible to sell them at higher prices.

2.5.2. The expatriate market is a secondary market for handicrafts. Interviews revealed that a lot of expats buy handicrafts for gifts, particularly around the Christmas holiday season. Most expats have considerable disposable income and look for handicrafts typical of the country where they are living to give as gifts to friends and relatives back home as well as to furnish their home. Shrewd producers of quality handicrafts will cultivate relationships with expats and locals who work for expat companies to encourage repeat sales and word-of-mouth recommendations to buy from them. This market is limited and has little prospects for expansion. It tends to be a more sophisticated market, however, and artisans with quality products can reap considerable rewards from this market.

2.5.3. The Gambian or domestic market is a third market for handicrafts. This market typically pays less than the tourist market and is less interested in non-functional items. Clothes are a good moneymaker with this group of consumers. They will pay a tailor or seamstress to make clothes out of locally produced cloth. The potential for expansion of this market is also minimal, since most locals already know the handicrafts produced and buy only those which fill their immediate needs. In addition, their disposable income is usually very limited, even less than the tourists. The advantage of cultivating this market, nevertheless, is that it creates repeat business and word-of-mouth recommendations.

2.5.4. Finally, the export market has the most potential for expansion of all four markets, but is relatively untouched by Gambian handicraft producers. From discussions with artisans and others in The Gambia, it appears that most Gambian exporters of handicrafts are producers who travel overseas with their products in the suitcases and try to sell them to retailers in the countries

they visit. The consultant was told that in one case, a local producer of batiks and tie-dyes received marketing assistance from the wife of a former ambassador to The Gambia who provided a linkage with some buyers in the her native country. Yet, it did not appear that she has maintained the linkage with any overseas buyers. Very few of the artisans interviewed had any experience with exports or even considered it as a viable alternative.

2.6 Constraints on the Expansion of Production and on Domestic and International Markets

The principal constraints on expanding production is the limited number of persons producing quality handicrafts and the lack of the use of machines which could increase production. The former could be corrected over time, but can only be accomplished gradually as individual artisans learn the requirements of quality control and also obtain an appreciation for the increased income it could bring. The more effective use of basic power-driven machinery could significantly increase production in some instances, but not all. Batiks and tie-dyed cloth, for example, could not utilize machines to any great extent. On the other hand, leatherwork could benefit significantly from the introduction of basic machines. The emphasis at this point should be to increase the quality of the handicrafts in The Gambia. Once promising export markets have been identified, the size of the market would need to be assessed and any increased production requirements addressed.

The constraints on the expansion of the domestic market were discussed above. These are largely due to the smallness and limited incomes of the population of The Gambia and the uncertain future of the tourist market. That is to say, the local market is already saturated, the expat market has limitations on expansion due to its small size, and the tourists do not buy all of the crafts already produced. Therefore, there is currently an excess of supply over demand. There might be some producers who are in great demand due to the quality of their handicrafts or their unique designs. But the general situation is that of saturation of the market with handicrafts.

On the other hand, the export market has great potential for expansion. This is due to the comparatively unlimited demand which exists in western markets for handicrafts and other products. The difficulty is in tapping this market. It takes a trained eye with experience in marketing handicrafts in those markets to identify and persuade potential customers (both wholesalers and retailers) to buy the products. This is the only logical market toward which to gear an effort to expand the handicraft sector. This market has great potential, but also considerable pitfalls. The thrust should be to develop long-term linkages with importers of Gambian handicrafts. These should be both wholesalers and retailers.

It is important to note that, in conversations with Stateside

importing organizations and retailers, The Gambia was not known for any unique type of handicrafts. One African clothes shop owner noted that The Gambia is known in West Africa for its excellent batiks and tie-dyed cloth. Others who had lived in The Gambia also made that comment. Although to persons without West African experience, The Gambia does not evoke any particular images relative to handicrafts. This has an impact on marketing Gambian products overseas, since one must begin to develop an image of Gambian crafts. This does not happen overnight; in fact, it takes years to establish such a product image. However, in the competition for export sales, Gambian products will suffer without some kind of competitive edge - whether it be in terms of uniqueness of product, low price or exceptional quality (or a combination of those factors).

The principal constraints on the export market for Gambian handicrafts are the general lack of experience in exports and lack of knowledge of the export market. In addition, handicrafts often require design modification to be appealing to consumers in other countries. Without an appreciation of this fact and a corresponding understanding of how products can be adapted, attempts to export can easily fail. In addition, it must be noted that exports must be competitively priced. Wholesalers and retailers of handicrafts in the U.S. charge a minimum of 100 to 200 per cent markup above the landed price of the goods in order to recoup their costs and make a reasonable profit. Therefore, the price charged the buyer overseas must be low enough to allow for a markup of that magnitude. This can be a difficult lesson for some producers to learn, but the potential volume of the export trade can frequently overcome the smaller profit margin to the producer due to the lower per unit cost paid by the overseas buyer.

3. RECOMMENDATIONS TO ENHANCE THE EXPANSION OF HANDICRAFT PRODUCTION IN THE GAMBIA

3.1 Sources of training and technical assistance to improve the quality and production techniques of Gambian handicrafts

A limited number of organizations exist in the U.S. and Europe which provide training and technical assistance to assist artisans in developing countries. Some of these organizations operate like consulting firms, although they may be nonprofit, in that they concentrate on providing experts to assist in product development and to identify promising export markets for handicrafts. The most well-known of these groups is Aid To Artisans (ATA) in Farmington, Connecticut. The Crafts Center in Washington, DC also provides this type of training as well as serving as a resource base for handicraft groups. A third organization is the Watermark Association of Artisans in Camden, North Carolina, which provides training to artisans in product development and in operating a handicraft business, with special emphasis on marketing. Watermark markets the products of its member artisans as well. This gives them an excellent understanding of the market for handicrafts. All of these groups have a development perspective and are mainly interested in working with low-income artisans in the U.S. and developing countries to increase their incomes and improve their standard of living. Of the three, however, Watermark is the only one actually engaged in the business of marketing the handicrafts of its members and, through establishing its credibility as a reliable provider of quality products, has developed very close and long-term relationships with its buyers. Watermark is in the business to make a profit for its members and this focus is reflected in their marketing strategy and experience.

Others, known as Alternative Trading Organizations (ATOs), concentrate on importing and selling third world handicrafts to consumers in the U.S. or Europe. Although ATOs can assist in product development and quality control, they do not usually have staff who perform these functions on a regular basis or who travel to perform these duties in the countries from which they import. Rather, they rely on related programs in the countries to provide this assistance; sometimes they will bring in an expert to work with some groups in a country who have a specific technical problem. Many of these ATOs are church-related. For example, two of the most prominent and successful in the U.S. are Self-Help, a Mennonite non-profit group located in Akron, Pennsylvania and SERRV, a non-profit group sponsored by the Church of the Brethren located in New Windsor, Maryland. These organizations are members of an international association of ATOs called the International Federation for Alternative Trade (IFAT). ATOs in Europe who are also affiliated with IFAT are Oxfam Trading and Tradecraft in the United Kingdom, SOS in The Netherlands, GEPA in Germany and OS3 in Switzerland. These European ATOs also are members of the European Fair Trade Association (EFTA) which sometimes provides cooperation

among members on product development.

ATOs will usually only import from nonprofit organizations. Their focus is more on the producer than on the product, since they are in the business for development reasons rather than to make a profit. One advantage with dealing with ATOs is that they will often pay an advance to local groups to serve as working capital to purchase product inputs. They also can assist in the paperwork of exporting, particularly on the U.S. side, and tend to have good working relationships with customs offices which help to get goods through customs expeditiously.

To sum up, the first group can provide intensive training and technical assistance both in-country and in the U.S. on business skills, marketing, quality control and product development. The second group can serve as a market for handicrafts produced by low-income artisans and marketed through local non-profit groups.

3.2 Potential marketing strategies to assist in the expansion of the market for Gambian handicrafts, both local and international, including potential distributors and importers to assist in the export of Gambian handicrafts

In terms of the local Gambian market for handicrafts, there is little that is not already being done to market them to tourists, expats and Gambians. The key point to emphasize in regard to the local market is the potential for producing better quality products which would command higher prices. This is the strategy being successfully employed by Suelle Nachif. There is room for more entrants into this upmarket category if they have the knowledge of how to appeal to this market and how to modify and improve products to reach this market.

For export marketing strategies, there is considerable work to be done. The first step would be to incorporate an NGO which could market products to ATOs and other overseas buyers and would serve as a conduit for funding training and technical assistance to Gambian artisans. Although GAMCO is supposed to be performing this function, there is almost universal agreement that it is not doing a good job. (It is important to point out that this is not a criticism of the staff of GAMCO. They are working hard to promote Gambian handicrafts but are limited by the organization's inability to adapt to changing marketplace demands and its limited budget.) GAMCO's declining membership is evidence of the need for utilizing a new organization to rejuvenate the marketing of handicrafts. One could appoint an advisory board to this NGO composed of various interested parties, including both prominent artisans, government representatives and others with marketing knowledge and experience. The NGO could be tied to the MTIE as its Ministry sponsor. Care must be taken to assure that it was independent from government. Otherwise, it could fall into the same trap as GAMCO has.

This NGO must be made viable through the performance of activities which would allow it to be financially sustainable. For example, it should charge a commission to Gambian artisans for all sales made to buyers overseas as well as charge a fee to cover their transaction costs to handle the shipment. The collection of these fees will not only help to make the NGO sustainable, it will also provide an incentive to promote increased exports. Another possibility would be to purchase some basic power-driven machines for use in different trades both to teach artisans how to use them and to charge a fee for using the machines.

The second step is to assess potential markets and determine the appropriate assistance and training needed to improve the products which have the most promise and in which appropriate production levels could be achieved. The evaluation of the products brought back to the U.S. by this consultant was the first effort in this direction.

The third step is to obtain training and technical assistance to assist the staff of the proposed NGO as well as Gambian artisans in developing export markets and in product design and modification to meet export market demands. USAID might incorporate this training and TA into its HRDA program. Key U.S. NGOs which have a track record and are currently providing the type of assistance described above might be encouraged to submit proposals for grants to provide the recommended training and TA. The proposed Gambian NGO and USAID could evaluate those proposals to determine which one offers the best program.

One potential market for Gambian handicrafts is African-American businesspersons who travel to Africa for either tourist or business purposes. An article in the November 1992 issue of Black Enterprise, a magazine published in the U.S. for African-American entrepreneurs, related the story of an African-American who visited Africa and developed an interest in importing and selling African-made goods in the U.S. His company, which is called A.L.L. International Clothing Company and based in Dallas, Texas, imports and sells African clothing and home furnishing. Their stock includes dresses, kimonos and tote bags made in Senegal and The Gambia. They have also been successful in selling their clothes to J. C. Penney department stores and their stock is carried in 150 stores nationwide. This type of linkage could be possible with other African-American businesspersons for other Gambian handicraft products. In fact, if this market could be targeted, the Gambian government might assist, through the NIB, to help finance part of the costs of U.S. entrepreneurs to come to The Gambia to explore the potential for this market. Some training costs for local producers might also be financed by the NIB. This contact could be promoted through the NGO established to market Gambian handicrafts.

A number of the sample products purchased by this consultant and brought back to the U.S. were evaluated by a number of the

businesses and organizations in the U.S. interviewed by the consultant prior to his trip. Considerable interest was shown in those products, particularly the tie-dye and batik although some were interested in the other products as well. Watermark has used some of the tie-dye material in a product sample which has been sent to a large cosmetics and toiletries company. If that buyer is interested in that product, there is a potential for using this instance as an example of how a long-term linkage between Gambian artisans and this marketing organization in the U.S. could benefit both parties. A copy of Watermark's letter regarding their evaluation of the Gambian products showed them is attached as an annex.

As a final note, it is important to stress that any attempt to increase Gambian handicrafts exports will require a long-term effort to show results. It will not happen overnight. It takes time to develop linkages with overseas borrowers, to improve and adapt products, to train local artisans in quality control, to establish trust and confidence in both the artisans and the buyers, and, not least of all, for the institution building aspect of the private NGO so that it can provide the guidance and assistance needed for the sector as well as to promote exports.

3.3 Potential Impact of the Proposed Marketing Assistance on the Development of Gambian Artisans

It would be difficult to quantify the impact of this recommended assistance on Gambian artisans without an accurate understanding of the size of the sector coupled with an analysis of projected increased sales, average income of the artisans, profits on increased goods sold, and the long-term potential for exports.

It should be emphasized that the handicraft sector in The Gambia provides income to a substantial portion of the population, particularly urban-dwellers. USAID and the MTIE could not identify any previous reports or research on the informal or handicraft sector. This made it difficult to ascertain the numbers of people affected by the sector within the short timeframe of this consultancy. Nevertheless, it is clear that hundreds (and, most probably, thousands) of Gambians are earning income from these activities, judging by the number of shops and vendors at the various tourist markets in Banjul and near tourist hotels. The larger number of people within the households of those persons producing or selling the handicrafts add to the number of persons which would be favorably affected by an increase in production brought on by increased exports.

Having said this, a thorough analysis to judge the cost-effectiveness of supporting this sector might very well cost more than the modest funds for training and technical assistance proposed in this report. Other countries have found it efficacious to support this sector, particularly in respect to increasing

exports. There is a certain element of risk in supporting this sector, since one can not say for certain that the effort will be successful. But neither can most private sector investors be sure that their investments will pay off. One can make a determination as to the likelihood of the purchase of Gambian products by importers in the U.S. and Europe. This has been done and the results are favorable, based on this consultant's experience and on feedback from individuals and organizations who evaluated the Gambian handicrafts brought back to the U.S. by this consultant. If one compares the expenditures recommended by this report to support the sector with the potential for impact if a successful export market is developed, it seems obvious to this consultant that the risk is well worth it. Another important aspect to point out is the fact the basic technology of handicraft development exists; what is required is assistance in improving on limited aspects of that technology to add value to the products and to make them appealing to export markets. Therefore, the assistance needed can be provided with minimal cost with a substantial potential return of increased production and, thereby, increased jobs and income for low income Gambians.

3.4. Recommended Level of Effort to Support the Sector

Three alternative scenarios for level of effort and their respective budgetary requirements are analyzed below, moving from highest level to lowest level.

3.4.1. The highest level of support would involve placing a long-term advisor with the proposed NGO to help the institution to develop and strengthen its role in promoting exports of Gambian handicrafts. This approach has been taken in some countries. It allows for a more active role on the part of the long-term advisor, but requires a substantially higher level of investment than the next two scenarios. The long-term advisor would be supplemented by short-term experts in various technical areas of handicraft development. Training of Gambians in marketing and product development would also be conducted. Assuming a two-year project life, the costs for this level of support could approximate \$500,000. Its advantages would include the capacity for more hands-on direction of the effort in country as well as the capacity for faster response to local conditions and needs. Its principal disadvantage would be its higher cost.

3.4.2. A middle level of support would require the services of a company or NGO which has experience in the development and marketing of handicrafts and would involve short-term consulting trips to the Gambia with a higher level of responsibility for the staff of the proposed local NGO. It would also include training in The Gambia, the U.S. and other countries. This approach is the most commonly employed technique to support handicraft development in developing countries. A two-year level of effort would require approximately \$100,000. It could piggy-back its efforts on other

on-going USAID projects in The Gambia, such as those being carried out through the NIB. Its advantages include the establishment of long-term marketing and product development linkages between the company/NGO chosen and lower implementation costs. Its chief disadvantage would be the limited capacity to

3.4.3. The lowest level of support would involve only one visit by an organization from the U.S. which might be interested in assisting the Gambian NGO to make the market linkage with interested buyers in the U.S. This would, in effect, be a one-shot effort and would not train any Gambians in how to market products or how to adapt them to meet export markets. This level of support would cost approximately \$10,000 to \$20,000. The only real advantage of this approach would be its minimal cost. Its disadvantages would be the lack of training of Gambians in marketing and the unlikelihood of any long-term market linkages developing.

3.4.4 This consultant recommends that USAID/Banjul support the middle level. This level of support is affordable and shows a serious interest in improving production and incomes in the handicraft sector. The highest level adds considerable costs without significant gains. The lowest level is so minimal, it is not worth the effort.

4. ACTION PLAN TO IMPLEMENT RECOMMENDATIONS

4.1. Policy and procedural recommendations for training, promotional activities, and essential equipment and supplies

4.1.1. The first step to take is to establish an NGO to promote the Gambian handicraft sector through export development and other actions. This NGO could be either a for-profit or a non-profit organization, depending upon the facility of forming each type of organization and the goals of the NGO. The MTIE and other interested parties could assist in this effort. Persons who have experience in handicraft development in The Gambia should take the lead in forming this NGO. Some possible candidates are as follows:

- Balla Sillah, formerly of CUSO and MTIE, now with the Population Council
- Ann Slind, CUSO volunteer who worked with the Gambissara weavers
- Suelle Nachif, former designer and buyer for fashion houses in Europe and U.S. and owner of boutique exporting handicrafts
- Elizabeth Kassa, owner of a craft store in Nairobi and currently in The Gambia with husband who is a contractor for USAID
- Ada Gaye, Industrial Development Unit, MTIE
- Amie Krubally, owner of Gena Bes Batiks
- Musu Kebba Drammeh, owner of MKD Batiks and Tie-dyes

4.1.2. After the NGO is established and the results of the product evaluations and test marketing is completed, proposals should be solicited from Aid To Artisans, Watermark and the Craft Center to assist in training of artisans, technical assistance to the NGO management, and marketing assistance to establish linkages with buyers in the U.S. This effort should be designed to be conducted over a period of at least two years and would consist of short-term training in The Gambia and the U.S. as well as visits by technical experts in specific handicrafts to help in product development and in the administration of exports.

4.1.3. Visits to gift shows and trade fairs in the U.S. and Europe by staff of the NGO should be supported both to expose Gambian products to buyers and to permit staff of the NGO to get feedback on the products from buyers, to inspect other handicraft products from other countries to assess the competition and get ideas for products and product modification, and to help them to make contacts within the industry.

4.1.4. Visits should be made by the NGO staff and specific artisans to other African countries to view their handicraft industries and promotion activities. Possible countries to visit include Kenya, Botswana, and Zimbabwe.

4.1.5. Machines and equipment for specific needs of artisans along the lines mentioned in paragraph three of section 3.2. above could be purchased.

4.1.6. Potential schemes for attracting African-American buyers of Gambian handicrafts should be designed with the collaboration of the NIB.

4.2. Target groups for training, types of training, duration, location and estimated costs

4.2.1 Local artisans are one target group. They should receive training and assistance in market-driven product development and quality control. This training should take place in-country and be conducted by a U.S. contractor in conjunction with the NGO established to promote Gambian handicrafts. Since IBAS is available to provide training in basic business skills, this training should not be duplicated. This training could consist of a series of modules which would explain different aspects of the issues. Details of how these training sessions would operate should be left to the NGO. Some of the more prominent artisans could accompany management and staff of the NGO on visits to other countries, where appropriate.

4.2.2. Management and staff of the NGO established to promote Gambian handicrafts are a second target group. They would receive the most intensive training and technical assistance. This would include practical training in the U.S. and technical assistance in The Gambia. They would also attend trade fairs and gift shows in Europe and the U.S. Visits to other African countries would also be made to acquaint them with the handicraft industries and promotion of handicrafts in other countries.

4.2.3 All of the training and technical assistance would be on a short-term basis and would be driven both by market requirements and by a training schedule established by the U.S. NGO providing the assistance.

4.2.4. Suggested Budget for Training and Technical Assistance

(Based on data provided by two U.S. NGO's providing assistance to artisans in the U.S. and overseas.)

Technical Assistance

Four trips to The Gambia by U.S. NGO awarded grant to assist proposed NGO in The Gambia

1st trip - 2 weeks X 2 persons @\$250/day = \$5000
2nd, 3rd & 4th trips - 1 week each X 1 person @\$250/day =
\$3750

(Assumes 5 day workweek)

Per diems - 7 weeks X \$150/day = \$7350

5 roundtrip airfares (Economy Class) @\$2500 = \$12,500

Three trips to The Gambia by technical/product experts hired by the U.S. NGO awarded grant

Three weeks @\$250/day = \$3750

Per diems - 3 weeks @\$150/day = \$3150

3 roundtrip airfares @\$2500 = \$7500

Subtotal - Technical Assistance - \$43,000

Training

Three 1-2 day courses in The Gambia on marketing, product development & exporting formalities conducted by visiting experts from the U.S. NGO. @\$2000 = \$6000

Participation by two persons from Gambian NGO in three gift/trade shows in U.S.

Travel - 6 roundtrip fares @\$2500 = 15,000

Per Diems - 6 persons X 3 weeks X \$150 = \$2,700

Gift/Trade Show assistance by U.S. NGO - 19 days X \$150 = \$2850

Internship at operations of U.S. NGO (on same trips as those to Gift/Trade Shows to save on airfares) - 13 days @\$300 = \$3,900

Lodging and other expenses while on internships - 13 days @\$100 = \$1,300

Subtotal - Training - \$31,750

Overhead and Administrative Costs of U.S. NGO

\$74,750 X 20% = \$14,950

Visits to Other African Countries with Strong Handicraft Programs

Trip to Nairobi - 5 persons

Airfares - 5 X \$2000 = \$10,000

Per Diems - 5 X 5 days @\$120 = \$3,000

Trip to Gaborone & Harare - 5 persons

Airfares - 5 X \$2500 = \$12,500

Per Diems - 5 X 7 days @\$130 = \$4,550

Subtotal - African Country Trips - \$30,050

(This item would be slightly higher if the U.S. NGO arranged for the trips to the other African countries.)

Total Estimated Budget - \$119,750

ANNEX 1

ASSESSMENT OF HANDICRAFTS INDUSTRY IN THE GAMBIA

Background

The Gambia has a fledgling handicrafts industry that includes artisans involved in the production of wood carvings, batiks, tie dye fabrics, dolls, leather goods and rug weaving. The quality of these items is generally poor and there is need to expand the market.

The ministry of trade, industry, and employment (NTIE) is the government industry that oversees the handicrafts sector. The majority of handicrafts artisans are small scale operators who derive most of their income from The Gambia's tourist industry. Women comprise a significant portion of handicraft artisans. Until recently a rug weaving cooperative received assistance through a Canadian NGO in the form of technical assistance and financial aid to build looms but the activity may soon flounder in the absence of a sound market strategy. NTIE runs a crafts cooperative but despite the boom in tourism, the business operates at a loss each year.

NTIE officials approached USAID/Banjul for assistance in funding training programs for artisans. There is an export potential for the industry but handicrafts workers are constrained by a lack of marketing outlets. NTIE is particularly concerned about the poor quality of handicrafts that are sold in The Gambia and would like to explore technological and production techniques that are employed in other countries experiencing success in producing and exporting handicraft items. USAID/Banjul is interested in supporting the expansion of the industry by providing appropriate assistance.

Candidate Proposed

Stephen C. Silcox (CV attached)

Proposed Level of Effort & Timeframe

Work on this taskorder would begin in early ~~July~~^{August} and the level of effort would be 24 workdays. This would include 4 days research/contacts with handicraft assistance and marketing groups in the US, 2 days travel to The Gambia, 14 workdays in country commencing on Thursday, ~~July 8~~^{July 8} and ending on ~~Friday, July 23~~^{Friday, July 23} (including work on Saturdays), 2 days return travel to the US and 2 days for final report writing in the US.

August 27

Aug 11

Tasks to be Performed

In the US

1. Receive short, briefing document from USAID/The Gambia on handicrafts produced in The Gambia, existing technologies used and markets for the products.
2. Contact/visit various groups in the US providing marketing and technical assistance to artisans in Africa to discuss potential markets for crafts produced in The Gambia and potential sources of technical assistance and training.

An illustrative list of groups to be contacted include:

Aid To Artisans, Farmingham, CT
Watermark Association of Artisans, Camden, NC
The Craft Center, Washington, DC
SERV, New Windsor, MD
Pueblo to People, Houston, TX
Self-Help, Acron, PA
Mission Traders, Washington, DC
Peace Corps/Africa Region

In The Gambia

3. Conduct an assessment of the handicrafts industry in The Gambia. The assessment will analyze the existing and potential participation of women in the sector. The methodology used will be to interview artisans and crafts workers, staff of local training institutions, and promotional institutions. The following areas will be addressed:
 - a. Types and quality of handicrafts produced
 - b. Constraints on quality and quantity
 - c. Training and technical assistance needs of local handicraft producers
 - d. Existing markets for handicrafts, both local and international
 - e. Constraints on domestic and international markets
4. Make recommendations to enhance the expansion of handicraft production in The Gambia including,
 - a. Sources of training and technical assistance to improve the quality and production techniques of Gambian handicrafts
 - b. Potential marketing strategies to assist in the expansion of the market for Gambian handicrafts, both local and international, including potential distributors and importers to assist in the export of Gambian handicrafts

5. Prepare an Action Plan to implement the recommendations mentioned above including,
 - a. Policy and procedural recommendations for training, promotional activities, and essential equipment and supplies
 - b. Target groups for training, types of training, duration, location and estimated costs.



U.S. AGENCY FOR
INTERNATIONAL
DEVELOPMENT

M E M O R A N D U M

DATE: August 27, 1993
TO: M. Peter Leifert
FROM: AFR/ONI/PSD, Neil Billig *N. Billig*
SUBJECT: Extension of Steve Silcox's Work on the Gambian
Handicrafts Industry

Please amend Steve Silcox's scope of work under Task Order 225 to allow for the additional work and time requested by USAID/Gambia as described in the attached fax from Barbara Jensen.

SENT BY: A. I. D.
USAID 220 28066

; 8-27-93 ; 10:53 ;
TEL No.

A. I. D. → LABAT ANDERSON INC. :# 4
28066 27 AUG 93 12:51 P.02

SILCOX LEAVES FOR THE U.S.A. TODAY. PLEASE LET US KNOW AS SOON AS
POSSIBLE IF THIS CAN BE DONE. THANK YOU.

ANNEX 2

ANNEX 2

ITINERARY AND PERSONS/ORGANIZATIONS CONTACTED

HANDICRAFT SECTOR ASSESSMENT - THE GAMBIA

Tues. 6:00pm - Leave Washington
8/10

Weds. 7:00pm - Arrive Banjul
8/11

Thurs. 9:00am - Introductory briefings with Barbara Jensen, Fred
8/12 Witthans and Bonnie Pounds at USAID/Banjul

10:00am - Visited Banjul tourist market and inspected
handicrafts and discussed craft trade with some artisans

11:00am - Introductory meeting with Ada Gaye, Ministry of
Trade

4:00pm - Visited Bungalow Beach tourist market and
inspected handicrafts and discussed business with some
artisans

7:30pm - Dinner meeting with Steve Wade, FAPE Project, to
discuss government trade policies and tariffs

Fri. 9:00am - Meeting with Balla Silla, National Coordinator
8/13 for the Population Council and formerly with the Ministry
of Trade

10:30am - Meeting with Mrs. Ndey Olie Jobe-Diouf,
Manager, Gambia Artisans & Marketing Cooperative (GAMCO),
Limited.

11:30am - Meeting with Indigenous Business Advisory
Services (IBAS) (Rescheduled for Monday at 3:00pm due to
emergency meeting of IBAS staff)

Afternoon - Reviewed documents dealing with handicrafts
in The Gambia

Sat. Called Amie Krubally of Gena Bes (Off 95068, Hm 95614)
8/14 to arrange appt today. She is in America. I arranged to
meet with her son and nephew next Tuesday at 10am.

11:00am - Meeting with Musa Kebba Drameh, Serrakunda
(Went to her home/workshop, meeting postponed to
afternoon due to tourists in buses coming to buy.)

2:00pm - Met with Mrs. Musu Kebba Drammeh and her grandson

Afternoon - Organize meeting notes and jot down initial impressions/ideas regarding assessment

Drafted workplan to submit to USAID on Monday

Sun.
8/15

OFF

Mon.
8/16

All Monday meetings were postponed to Tuesday due to an unexpected holiday announced by the President Friday night. I worked at the hotel to prepare various materials, to jot down ideas and impressions, and to identify other potential individuals/organizations to interview.

Tues.
8/17

10:00am - Meeting with Mamour Jagne, Permanent Secretary, Ministry of Trade

11:00am - Meeting with Ibrahim Manneh, Permanent Secretary, Ministry of Tourism

Workplan submitted to USAID

2:00pm - Meeting with Adelaide Soseh, Project Manager, WID Project

3:30pm - Meeting with Suelle Nachif, designer and exporter of Gambian handicrafts

Weds.
8/18

Field trips/interviews with artisans - all day

- Momadou Wally Bahoun, batik maker, Bakou
- Muktar Jallou, tie-dye maker, Serrekunda
- Gena Bes, batik & tie dye factory, Bakou
- Alagie Gaye, pottery trainer, Community Development Division Center, Brikama
- Jibriel Mendy, potter, Brikama
- Jerre Sowe, President, Woodcarvers Cooperative, Brikama

Thurs.
8/19

Interview with Adama Touray, silversmith, BB Hotel Market

Worked at hotel on logistics for trip to Basse and drafting sections of report

Fri.
8/20

Field trip to Basse - all day

Interviews with the following:

- Aussainou Jobarteh, Acting Principal, Rural Development Institute
- Fatou Faye, Coordinator, Rural Vocational Training Program
- Demba Bah, Basse IBAS Project Officer
- Foday Kanteh, silver and goldsmith, Basse
- Jimara Handicraft Assn (traditional cloth weavers), Numuyel
- Mama Jidda Society (cloth weavers a/k/a Gambissara Weavers), Gambissara
- Sotuma Potters Assn.

Sat.
8/21 Worked on notes from field trip and report

Sun.
8/22 OFF

Mon.
8/23 Work on draft report

 12:00pm - Interview with Pa Jobe, son of I.B.M Jobe, the jeweler

 1:00pm - Meeting with Jeremiah Allen, Asst. Mgr., IBAS

 3:00pm - Interview Lamin Kuyateh of Gena Bes, son of Amie Krubally (owner)

 5:00pm - Meeting with Elizabeth Kassa, owner of handicraft shop in Nairobi

Tues.
8/24 Work on draft report

 5:00pm - Meeting with Momodou Drammeh, leather expert

Weds.
8/25 Work on draft report

Thurs.
8/26 Submission of draft report to USAID and MTIE

 Buy samples of Gambian handicrafts

Fri.
8/27 10:00am - Debriefing at USAID

 2:00pm - Meeting with Ann Slind, CUSO volunteer working with Gambissara weavers

 7:30pm - Lv Banjul

Sat.
8/28 3:30pm - Arrive Washington, DC

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ANNEX 3

ANNEX 3

WATERMARK ASSOCIATION OF ARTISANS, INC.
150 US Highway 158 East
Camden, NC 27921
919-338-0853 Fax-919-338-1444

September 20, 1993

Steve Silcox
3445 N. Edison Street
Arlington, VA 22207

Dear Mr. Silcox:

This is a recap of the ideas that we discussed in relation to the Gambian products which you showed us September 13.

1. The general quality of the sample products was very good.
2. By changing basic designs and modifying production techniques, most of the products have the potential to be marketable and with greater added value.
3. A story should be developed and told to enhance the marketability of the product lines to major buyers.
4. The tiedyed cloth has excellent potential to be used to make a variety of products ranging from clothing to quilted and sewn items.
5. Through the introduction of some polishing techniques and the use of some equipment, the quality of the silver products and others could be greatly improved. This could be accomplished through master artisans training the crafts persons and through utilizing a revolving loan fund that crafters could access to buy equipment thereby having vested interest in the success of a marketing project.
6. The products could be divided into two general groups: those which have limited market appeal, even if they are modified, and those which have high potential for wide adaptability and acceptability in the marketplace. For example, some of the handcarved wooden pieces and some silver jewelry pieces could be developed as one-of-a-kind items thereby adding value while lending them to an affluent market such as museum shops and ethnic folk art shops where only a few of each piece is bought by individual stores but the vendor's return is substantially higher than in the general wholesale market.

Watermark Association of Artisans, Inc.
page 2

Following are some basic assumptions Carolyn and I feel are important.

1. In order to insure a more stable source of income, a multi-year marketing plan must be devised which would include both retailing and wholesaling. Selling in the wholesale marketplace is a strategy that should be developed as means of a year round and growing outlet for products. Pursuing wholesale avenues in the European and US wholesale marts is crucial to developing a dependable buyer's list.
2. Developing organization structure and capacity building are as important as training individual craft persons. In addition to the craft person knowing how to cost out the product, be aware of production techniques and shortcuts, and source good raw materials, he also must be aware of and understand the various components which will help make successful the cooperative or other business structure he is working in if he is to become empowered in the decision making processes of the organization and in taking more control of his financial future and his craft business.
3. One of the cornerstones of long-term marketing success is to analyze the marketplace and to determine marketing niches which need to be filled. Recognizing the windows of opportunity and quickly responding before the competition saturates the market is critical. Products must be developed quickly for the market rather than trying to find buyers for the products which have been developed for the local market without regard for the broader marketplace.
4. Through cross-training craft persons, a work force could be created which would be successful in filling diverse smaller orders at the beginning of wholesaling yet would be able to respond to filling large orders once the wholesaling had begun to reach the larger buyers.

If you have any further questions or ideas about your marketing project, please do not hesitate to call.

Sincerely,

George McKecuen

George McKecuen

GM/br
enclosure