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EXPORT MARKETING POTENTIAL
OF JAMAICAN HANDICRAFTS

Submitted to

Jamaica Small Business Export Development Program
Chemonics International Inc
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Submitted by

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Overview

Aid to Artisans (ATA) was contracted by Chemonics International to evaluate the export marketing potential of Jamaican crafts and conduct an in-country craft export seminar focusing on product development and price structuring for export. The work contributed to the Jamaican Export Association's (JEA) Small Business Export Development (SBED) program funded by the U S Agency for International Development. ATA's marketing manager, Karen Gibbs, traveled to Jamaica between December 17-19, 1995 to provide the contracted services. The following report reflects the consensus of Aid to Artisans.

To survey the available Jamaican craft products, Karen Gibbs was escorted to the Devon House Annual Holiday Craft Fair on December 17-18 by Sheila Graham of SBED. Despite the rain which forced some artisans to pack up early, the full range of exhibitors and products at the craft fair were surveyed. Artisans and vendors were asked questions about production capacity, pricing, availability of materials, marketing outlets, customers and export experience. While there were numerous vendors of Jamaican "rasta" tee-shirts, tourist products and low-quality, inexpensive gift items, a strong collection of quality, well-designed craft products with export marketing potential was discovered.

In addition to the Devon House, two retail craft stores in Kingston were visited, Patoe Gallery and Craft Cottage. Many of the best products for sale at Devon House craft fair were also available in these stores, however other unique and interesting craft products which showed strong product development and export potential were discovered in these stores. A short visit to the National Gallery, provided insight into the strong art culture in Jamaica. The National Exhibition highlighted contemporary Jamaican artists who are remarkably talented and demonstrate a uniquely Jamaican character.

The seminar held at the JEA on the morning of Monday, December 19th was attended by enthusiastic, professional and ambitious craft producers and members of JAMPRO. The seminar focused on export distribution channels, export pricing structures, and product development for export. Materials including retail catalogues and magazines pertaining to the craft, gift and home furnishings market were shared with the participants and then donated to JEA's resource library by ATA. An outline of the presentation is attached.

In conclusion, the export potential of Jamaican crafts exists in the product categories selected in this survey. To realize new export markets in the U S and additional marketing opportunities in the local Jamaican and regional CARICOM islands, assistance is needed in product development, production capacity, pricing and marketing of existing Jamaican craft products.

An Evaluation of the Export Potential of Jamaican Crafts

During Aid to Artisans' (ATA) visit to Jamaica between December 17-19, 1995, the following Jamaican crafts product categories were surveyed to evaluate their export marketing potential ceramics, wood, straw, calabash, bamboo, textiles, and to some extent, aromatherapy and gourmet food products The criteria used to evaluate the export marketing potential of these product categories are design, price, quality, production, product development and market outlets Products seen at the Devon House Christmas craft fare and local Kingston craft retail stores were evaluated based on these criteria

Overall, the following conclusions can be drawn in regards to the export potential of selected existing Jamaican crafts

1 While Jamaica does not have a long history of distinct craft traditions, a contemporary crafts sector exists which is characterized by artisans with strong, highly individual design skills Therefore, the "style" of Jamaican crafts lies in the individual artisans' designs and techniques The artisans' signature styles differentiate the craft product lines

2 Because of this inherent and individualistic design talent of the selected craft producers, product development input should be well received With direction on the size, function and general theme of a product line, the selected crafts producers have the necessary design skills to translate the suggestions into high-quality, beautiful product lines with strong marketing potential This design skill is an important element to insure successful product development for export marketing

3 The quality of selected crafts products ranges from good to high The local tourist market is flooded with inexpensive, low-quality products, but there is also a large variety and quantity of quality crafts For the most part, the quality products are made by the artisans themselves, or with minor assistance from contracted help The quality is therefore insured by the artisans' own hands Many artisans have received technical training at the University in Kingston which directly benefits the quality of crafts The challenge will be to maintain the same quality as production is expanded to meet export quantities

4 The production capacity of craft products is not currently organized for export Most of the products are made by the individual artisans, and production is limited to the capacity of a one-person workshop Some artisans work with their spouses, with contracted piece workers or a small workshop While each product enjoys a unique charm because it truly bears the mark of its maker, the production capacity is limited for export

5 The prices observed during this survey are prohibitively high for export consideration. Most retail prices in the Kingston markets are comparable to retail prices in the mass U S gift market. At the current prices, the domestic markets are strong. Most artisans sell a substantial portion of their products in the local tourist markets. In addition, several artisans reported that Jamaicans pay a higher price than tourists and that Jamaicans demands higher quality. A careful study of export pricing was difficult because the products were surveyed in retail settings which were not conducive to discussing export pricing. Separate export pricing must be established, then carefully evaluated in relation to the local demand.

6 The current local and regional CARICOM markets for Jamaican crafts are providing adequate demand for the current production capacities of the crafts producers. Most crafts producers are even challenged to keep up with the domestic demand. The question of whether or not these crafts producers want to become export producers, which will either require shifting production or expanding production for export orders, needs to be carefully evaluated by each producer. Export production is often cyclical, with times of low production.

In respect to developing the marketing potential of Jamaican crafts, the following comments are offered:

1 The local Jamaican and regional CARICOM markets hold unrealized potential for Jamaican crafts. Specialized product development, pricing and marketing assistance geared towards these markets can help obtain the additional potential. The quality and variety of crafts available to tourists in the hotel, resort and airport stores do not reflect Jamaica's rich craft culture. New craft products can be designed and merchandised for current tourist tastes and requirements. The products that Americans buy while on vacation differ from what they will buy in their neighborhood store at home. Developing lines for the tourist markets in addition to offering exclusive product lines developed for a specific resort outlet are two product development possibilities. One of the largest Caribbean resort chains is currently importing products into Jamaica and the Caribbean region for their souvenir stores because they need to insure that the products offered in their stores are not available in the local markets. Seasonal craft fairs of fine Jamaican crafts could be arranged to attract tourists. While many of the producers surveyed reported that they sold products to retail stores which served tourists, none seemed impressed with the sales from the tourist stores. Likewise, many tourist have not been impressed with the offering of Jamaican crafts.

2 U S retail and wholesale buyers can be found in the tourist markets. Buyers from U S retail stores, importers and wholesalers travel to Jamaica on vacation each year, and a good buyer is always looking for the new and unique product, even when they are on vacation. Select advertising at the airport about export craft opportunities would make it easy for those buyers to discover unique Jamaican crafts. A export craft showroom, a referral system with information about export craft producers, a brochure with export craft product and information would interest a buyer. One problem facing any crafts producers wanting to export is how to meet buyers. Jamaica's vacation destinations may be the place to meet some buyers, but the buyer needs to know what Jamaica can offer.

3 Given the current limited production capacity and relatively high pricing of Jamaican crafts, in order to enter into the U S gift market, the Jamaican craft sector needs a few small, U S importers/wholesalers to gradually introduce Jamaican crafts into the U S gift market. The small importers/wholesalers will start with small orders and slowly build production with the producer. An importer/wholesaler is also more likely to work with the producer on long-term product development and negotiate price adjustments to maintain competitiveness in the U S market. An importer/wholesaler is also responsible for all the marketing to retail stores which the current Jamaican crafts producer does not have the time or resources to devote to. These importers will also start to establish a name recognition for Jamaican crafts. These importers need to have a target customer base of small, individually owned, higher-end specialty retail stores who do not place large orders.

4 To meet the demands of an export market, production capacity needs to be expanded and organized. This production expansion should be under the guidance of the talented Jamaican crafts producers who have the design talent and quality control standards to insure consistency in production. Training should be made available to help schedule and manage production for export.

5 With the existing craft skills and techniques, the U S gift, home furnishings, gardening and children's markets are most appropriate. These market sectors overlap considerably, for example, gift store buyers may also attend the children's' boutique wholesale trade show, or a home furnishings store buyer will attend both the High Point International Furnishings market and the New York International Gift Show.

6 Jamaica has an advantage over other craft exporting countries because of its proximity to the U S, ease of communication, convenient and frequent travel arrangements, and common language. All of these factors are critical to establishing long-term marketing relationships with U S importers and buyers.

7 Jamaica has an established identity in the U S which can help promote Jamaican crafts Americans are familiar with Jamaica's music, vacation destinations, and sports Crafts products can build upon that familiarity by identifying the craft products with Jamaica and introducing a new or refined image of the island U S customers may buy products from Jamaica because they have fond memories of a past vacation, or hopes for a future vacation Some new, refined Jamaican themes that have not been explored for export products might include Blue Mountain images, colonial designs and motifs, West Indies spices, palm trees, in addition to the popular tropical, nautical and Caribbean themes

8 The packaging market is another outlet for Jamaican crafts The gourmet food products, aromatherapy and maybe even rum, need clever, beautiful packaging to distinguish themselves Ceramics, baskets, wood, textiles, calabash, bamboo can all lend themselves to this market Picnic baskets with Jamaican barbecuing seasonings A bottle of rum with carved wood tropical leaf coasters on which to place your frothy rum drink Bamboo canisters with sea salts and soaps to decorate your bath All great outlets for crafts products Artisans need to approach the manufacturers to help develop new marketing packaging ideas

Recommendations for Craft Export Market Development

To assist Jamaican artisans in realizing new marketing opportunities in local Jamaican, regional CARICOM and export markets, Aid to Artisans suggests a comprehensive marketing program including product development training and marketing assistance over a period of at least two years

Aid to Artisans would be pleased to develop with JEA a proposal for such a marketing program which meets the current available resources

1 Product Development

The premise of Aid to Artisans recommendations is that market-oriented product designs and pricing is the essential component for realizing greater markets for Jamaican crafts. Therefore, for the first step, ATA recommends a product designer/merchandising specialist to work with select crafts producers in Jamaica to help expand product lines, simplify designs and products to meet target price points, and introduce new product categories. The designer will build upon the existing designs and technical skills of selected artisans. The new product lines will be targeted towards the local Jamaican, regional CARICOM, and export markets

2 U S Market Introduction

With new product lines and pricing established, ATA can assist Jamaican artisans to realize export marketing opportunities through participation at the New York International Gift Show. The gift show is a forum to generate wholesale orders from the over 35,000 buyers who attend the show. In addition, the gift show is an opportunity to identify and meet importers and buyers and to establish long-term relationships for distribution and marketing in the U S. Appointments with buyers, importers and wholesalers will be arranged for the Jamaican artisans. Participation of the affiliated artisans in ATA's marketing and product development training activities during the gift show is encouraged.

Products to concentrate on for product development include wood, straw, ceramics, calabash, and bamboo. Textile product development should be focused primarily on the domestic market.

3 Marketing Follow-Up

Establishing long-term relationships with buyers, both U S importers and retail buyers, takes time, patience and persistent, professional follow-up. Designing a program which provides marketing and product development follow-up is essential for insuring the success of a craft marketing program.

Feedback on product design and pricing can be provided by Aid to Artisans' Designs Meetings. By inviting key buyers, product designers and retail specialists, Aid to Artisans gathers expert feedback on new products from Aid to Artisans projects. Pricing, product design and marketing suggestions are reported back to the artisans. Ideally, a Design Meeting is held after a product designers consultancy in a country. With product feedback, artisans can then develop additional products for consideration in the New York Gift Show.

Providing marketing follow-up through Aid to Artisans marketing staff and through the SBED offices to facilitate negotiations with buyers is important. Advice on communication, referrals to interested buyers, and providing buyers with relevant information, product samples and photographs are examples of this assistance.

3 Other Resources

Production Management and Expansion

In order to meet export product levels, producers may require assistance in managing and expanding production. Expert advice on managing cottage industry workers, or on scheduling and forecasting production to fulfill export orders, and maintaining quality control, will be required to insure that artisans can meet export orders in a timely fashion.

Local and Regional Marketing

A marketing specialist can be contracted to address local and regional marketing opportunities. Services included could be providing advice to retailers on how to merchandise their stores, developing marketing strategies for artisans to expand their buyers base, identify key buyers, develop product catalogues, negotiating exclusive arrangements. These issues can also be addressed by the product development and merchandising specialist.

Resource Library

Establishing a marketing and product resource library by subscribing to a variety of gift, home furnishings and fashion magazines and trade journals will help provide indispensable market information on product trends, pricing and marketing tactics. A list of suggested trade journals and magazines are attached. In addition, retail mail-order catalogues are an invaluable source of pricing information. The catalogues donated to the SBED library can be requested from the companies.

**Recommendations for Market Introduction
in Conjunction with the August Ball and Fashion Event**

As discussed with Sheila Graham at the January New York Gift Show, Aid to Artisans can assist SBED/JEA with a craft market introduction to coincide with the August special ball in New York City

As the above recommendations state, market success is dependent upon having market-ready products. ATA recommends a one-month, in-country consultancy with an ATA product designer who will work with a variety of selected craft producers to expand product lines, evaluate and adjust pricing for export, and merchandise a cohesive product presentation for the New York Gift Show. The expertise of this product designer will be strong design and merchandising skills grounded in concrete marketing knowledge of the U.S. gift market.

The newly designed product presentation will debut at the buyer's breakfast in conjunction with the August ball. ATA can assist by providing a booth display specialist for the presentation. ATA can also assist by making recommendations of gift and home furnishings buyers for invitations for the buyer's breakfast.

During the New York Gift Show, August 11-15, Aid to Artisans can introduce the newly designed Jamaican products in ATA's booth. Both retail and wholesale buyers will be invited to the Jamaican exhibit, and appointments with target buyers will be arranged. Buyers from the buyer's breakfast will be encouraged to visit the ATA booth.

As stated above, marketing follow-up is necessary to build long-term relationships with buyers. ATA can provide marketing follow-up on a monthly basis. This follow-up includes buyers referrals, resolving buyers' questions from NYGS orders, scouting other trade shows for potential wholesale buyers, and showing products in the ATA showroom and office to invited buyers. This time can include participation of Jamaican crafts in a Design Meeting, where buyers with a Jamaican or Caribbean interest will be invited.

Aid to Artisans has attached a proposed budget for this program.

Product Review By Product Category

The purpose of this section is to establish the groundwork for future product development and marketing work. Given the short term of this consultancy, the following comments are not conclusive or complete. They are the start of the work to help Jamaican artisans realize new marketing success by adapting product to meet market demand. The comments are made from the perspective of the U S gift and decorative accessories market.

1 CERAMICS

Design

The two different design categories of ceramics observed during this consultancy include 1 high-fired, glazed ceramics used mostly for decoration and some functional tabletop items (some product lines are painted with acrylic rather than glazed and are used strictly for decoration), and, 2 low-fired terra-cotta pieces with minimal or no finishes.

The designs of the various high-fired glazed ceramics product lines are, in general, contemporary and highly individual. Designs include southwestern motifs, abstract, organic patterns, geometric designs, primitive etchings, and an abstract face motif. Metallic glazes are used in several product lines. The different ceramic collections are extensive and offer products of all shapes, sizes and functions, from small ashtrays to large decorative urns, mugs to serving platters, decorative tiles to figures and masks. Few of the collections have an identifiable Jamaican theme, but rather they are similar to ceramics products sold in U S retail craft fairs and stores.

The low-fired terra-cotta ceramics have a more primitive feel. One producer makes large pots and vases which are similar to Ghanaian "vume" pots. Apparently, a Ghanaian woman resided in a Jamaican mountain village and taught the residents this technique. The woman is no longer living, but the large pile of "vume" style pots for sale at the Devon House indicated the effects of her training. The pots were offered in different sizes ranging from approximately 8" diameter to 18" diameter. The pots are finished with a firing that leaves random ash colored markings. The pieces are large and graceful with rounded handles and thick rims. Another ceramist offers terra-cotta pots with a light, chalk-like wash and simple geometric patterns decorating large decorative vases and pots. Both of these product lines are slightly less artistic than the high-fired, glazed pieces, but offer an appealing natural design.

Price

The pricing of the high-fire glazed products is prohibitively high for export. Prices are comparable to the retail prices of products available in U.S. craft fairs. Without more distinguishing designs, the high-fired ceramics products will have difficulty competing with domestic U.S. prices.

The pricing of the unglazed terra-cotta pots needs to be investigated because the representatives at the crafts fair did not have export pricing.

Pricing of ceramics is especially challenging given the packaging requirements to prevent breakage which adds to the cost of the product and the cost of shipping. However, given Jamaica's proximity to the U.S. and lower shipping costs, the low-fired terra-cotta pots may be price competitive.

Quality

The quality of the high-fire glazed products is very high. The quality of the low-fire ceramics were good, but there was some cracking and defects. This cracking added to the rustic charm of the product, but is dangerous for shipping concerns.

Production

The production levels of the high-fired decorative ceramics are not currently at a level to consider for large export orders. Most product lines are made by only two or three people, including the artisan/designer. Part of the inherent quality of these products is that each piece carries the signature of its artist's own hands, therefore it will be difficult to duplicate these identical designs.

Jamaican ceramists have established their own representative organization to collaborate on issues of mutual concern. This organization could provide the framework for establishing a common production facility for ceramics. Ceramics artisans can design a product line to meet export pricing and design specifications and the common production facility can manufacture the products. Employment for skilled artisans can be provided by the production facility, and larger production capacity can be provided to ceramists wishing to meet export production levels.

The production of the "vume" style pots shows considerable potential given that there is a town which has received training in this technique. With a base of artisans skilled in this technique, the focus of production expansion will be to organize the artisans into an effective production mechanism. The other chalk-like finished pots are a relatively simple technique and should be easy to teach to other producers to expand production. Similar production organization will be required.

Supply of ceramics materials for export production levels are readily available

Product Development

Given the wide range of products already, the potential for product development is high. The artisans already know how to make a variety of sizes, functions, shapes, etc. The producers were receptive to product suggestions, and also shared their own product ideas.

One focus of product development for the high-fired ceramics will be to design a product which is affordable for export, or more affordable for the local markets. Simplification of design motifs, product shapes and finishes can help to reduced production costs and the cost of goods. Expanding product lines to offer a range of price points will give buyers options to select the lower priced goods.

The design of many ceramics lines are not unique in the U.S. crafts market. The lines are very similar to product lines found in the U.S. retail craft sector. Product development to create a unique design for export to the U.S. is suggested. Creating a uniquely Jamaican identity to ceramics lines is a possibility. While the designs are distinct for the domestic market, not all of them are distinct for the U.S. market.

The low-fired terra-cotta pots are marketable as is. The addition of a few different sizes of pots may benefit the product lines. Also, a few pieces may be added to target the gardening market such as birdbaths, birdfeeders, etc.

Market Outlet

The high-fired glazed products seem best suited for the retail crafts fair market in the U.S. both due to their pricing (which cannot currently bear a mark-up through an importer/wholesaler) and the design. The time and financial commitment to effectively market products at retail craft fairs will be demanding for the resources of a small ceramics producers. Developing products at a lower price point and with a distinct Jamaican image will insure greater success in the U.S. market. Working closely with a small importer to merchandise the ceramics products with an entire Jamaica collection will help market the ceramics products.

If the U.S. retail crafts sector becomes the decided market channel for Jamaican crafts, then the ceramics organization in Jamaica may consider doing collective marketing and renting a space in the retail craft shows to display a range of several Jamaican crafts producers products.

There is a growing African-American market and customer base in the U.S. Many of the individuals are Jamaican. The market is not as organized as the traditional gift market in that there is not a large number of wholesalers who exclusively target this market. But there are an extensive number of retail stores

and retail craft fairs which target this market. Consideration of exporting direct to these retail stores should be made. The largest retail catalogue to target the African-American market is E-Style catalogue, a joint-venture between Spiegel catalogue and Ebony magazine. Kwanzaa related events and fairs are another specifically African-American outlet for retail craft sales.

The low-fired terra-cotta pots could find an outlet in the garden accessories and outdoor market. Given the proximity to the U.S., shipping costs should make the pots competitive with other sources. Production will need to be large enough to fill a 20' container in order to keep shipping costs low. Smith & Hawken, Gardener's Eden, Pottery Barn, Cost Plus, and other retailers could be a potential outlet for these pots. Whispering Pines, Sundance Catalogue are potential buyers.

For all ceramics products, as almost all Jamaican crafts, the local markets need to be heavily investigated. Interior decoration of hotel, resorts and corporate offices could be a considerable outlet for high-end ceramics crafts. Several ATA affiliated wholesalers with distinctly African and West Indies products are currently exporting to Jamaica. The crafts available in Jamaica can compete in quality and design with these products.

2 WOOD

Design

A variety of wood products were identified in this survey. Carved and naturally finished wood spoons, bowls and platters were made by several producers. These shapes were smooth, graceful and organic, and they highlighted the natural features of the wood. Painted wood products included a line of lacquered wood made into puzzles, mirrors, boxes and wallhangings in brightly colored tropical and underwater themes, such as fish, shells, seahorses, birds, flowers, etc. Acrylic painted wood frames in delightful and juvenile motifs formed a cohesive line from another producer. Other painted wood products include small home accessories such as trays, small bureaus, chests and small tables in bright, fruity motifs. More primitive carved wood products such as wall hangings, mobiles and ornaments represent tourist Jamaican themes. High quality marquetry frames, trays and decorative boxes formed another product lines.

Price

The pricing of wood products was comparable to retail pricing in the U.S. gift 'mass market', such as Pier 1 and large department stores. In order to compete in this market, the producers will have to reduce their costs to 1/4 or 1/6 of the current price, dependent upon which export marketing avenue they decide to target (through an importer or direct to retail stores).

Production

Many of the wood producers were one-person workshops, however there were also several well-organized larger workshops who hire full-time workers and/or piece workers. Some of the artisans are purchasing finished product inputs, such as picture frames, which are then painted or finished by the artisans workshops.

A limitation in expanding production capacity will be the supply of wood, and especially wood that is acceptable to U S customers. There is growing concern in the mainstream marketplace about the source of wood, especially hardwoods. With deforestation issues worldwide, the producers will have to investigate the source of wood, whether or not they are self-sustaining forests etc. And even if the source is not sustainable, a reliable source must be secured to forecast production capacities.

Product Development

Product lines need to be expanded. With a few exceptions, most of the wood producers need to offer a wider variety of price points and products to their customer. For example, the painted desk frame producer could add decorative boxes and other desk accessories to their product lines. Desk frames need to be offered in all sizes.

Wood lends itself to many product in the gift and home furnishings markets, and there are many unique designs of Jamaican wood products that would adapt well to these popular products. Some products lines include desk frames and larger picture and mirror frames, decorative boxes, coasters, small furniture pieces, trays, napkin rings, candlestick, trivets, ornaments, spoons, bowls, platters, and more. Product lines can be developed to offer several design patterns and several sizes for each collection.

Market Outlet

The brightly colored motifs are excellent products for the beach and resort market, both in Jamaica and for export. The tropical, Caribbean designs have true market appeal in certain sectors of the U S market. Florida beach towns, Eastern Shore beach stores and other vacation spots in the U S sell similar products. There are also a variety of catalogues, such as Tiger Lily.

The children's market continues to grow in the U S. Baby boomers are in the peak of parenthood and are spending a substantial amount of money on their children. While the children's toy market is highly regulated for safety standards, it also offers opportunity for Jamaican wood products, such as the puzzles. Children's decorative accessories such as wall hangings, mobiles, small accent furniture, and boxes are an excellent outlet from brightly colored Jamaican products.

The carved, naturally finished wood products are marketable in the kitchen and home accessories market. Cooking products are always in demand, and especially as there is a strong emphasis on staying at home, eating dinner at home, entertaining in modest means, etc. Wood spoons, serving platters and bowls are all popular products. These products could be easily packaged with Jamaican food and spice products.

The marquetry products have already been carefully evaluated in a previous Chemonics report. ATA agrees with the findings of this report.

3 STRAW

Design

The design of Jamaican baskets seen during the consultancy are lacking character. There is little that is distinguishing in the designs, color or quality of the straw. The most appealing use of straw was in hats. Coconut leaves and fibers were also woven into rather bulky hats with an intriguing character.

Price

The price of baskets did not appear competitive for export to the U.S. The Jamaican baskets seen in the markets cannot compete in price or quality with baskets produced in Asia. The quality of the baskets does not justify the current price. The price of hats appeared moderately competitive for an upper-end fashion market. As in other product categories, export pricing needs to be carefully evaluated.

Quality

The quality of the straw and coconut hats were good. The minor imperfections lent to the authenticity of the product -- the fact that they are hand-woven. One motto for crafts producers is to always try to produce what a machine cannot do. Machines cannot consistently have the minor flaws or inconsistencies that lend to the hand-made quality. These hats have a charming hand-made quality.

The quality of the baskets were mediocre. They were comparable to the sea of the most inexpensive baskets available from Asia, and they can't compete with Asian prices.

Production

There were rumors that straw supply is a problem in Jamaica. This may explain the limited quantity of baskets available in the market place. Supply certainly needs to be investigated. Otherwise, basket making is one of the most practiced crafts in Jamaica, so the crafts producers are available. Production organization may need addressing.

The hat producers are meeting considerably high quantity levels. One hat producer supplies to official hat for a regional sports event. Production is organized for larger production levels in these fine straw hats.

Product Development

The hat market in the U.S. is growing. Hats are needed in every beach town, in the U.S. and the Caribbean. Americans are concerned about getting too much sun and skin cancer, and hats are the answer. As well as giant straw umbrellas for the beaches. Or straw woven beach baskets and blankets. Product development can focus on the beach theme of straw products, using embellishments such as carved and painted wood seashells or fish to decorate bags.

Baskets are also a natural for the packaging market. Developing baskets to adapt to the specific needs of gourmet food gift baskets and working directly with the gourmet food producers to develop an exclusive line of baskets is a good local market product development objective.

To add new life to the basket designs, new colorways need to be developed. Given Jamaica's spice history, there must also be a wealth of natural dyes available. Naturally dyed straw woven into baskets or hats. Also, mixed media baskets and hats. Line with fabric, decorate with dried flowers or herbs, embellish with ceramic charms or carved wood buttons, etc.

To identify straw products with Jamaica, hats and basket styles can be named after the different beaches or mountains in Jamaica, or different spices, coffee, etc. The Blue Mountain brimmed hat. The Montego Bay bonnet. The Kingston carry, etc.

Market Outlet

Beach fashion accessories for the domestic, regional and export market is a natural for the straw hats. New product designs are needed for the local markets. Given the growing popularity of hats in the U.S. market and fears of skin cancer, the export hat market holds real potential. A collection of hats which build upon the Jamaican beach theme, or other Jamaican images of spices, coffee, palm trees, etc. Hats are marketable products in the gardening, fashion and children's markets.

The packaging market for gourmet foods, aromatherapy, and rum is a natural outlet for baskets. Marketing a completed gift food basket adds value to the product, and also provides an outlet for baskets.

4 CALABASH

Design

Calabash products are either carved with simple geometric patterns and unfinished, or else brightly painted with tropical motifs and color palettes. The gourds are combined with a variety of materials including straw, textiles and leather to make containers, boxes, and handbags. Musical instruments are made out of calabash. The gourds come in a variety of sizes, shapes and functions.

The design of the unfinished, natural colored calabash gourds is very appealing. The carved designs are subtle. The colors are neutral and range from beige to a darker brown.

The colorful gourds have an irresistible charm. Some of the mixed media products with calabash gourds are best left to the tourist market, but the brightly painted gourds with floral and tropical themes are quite desirable. They are similar to Haitian painted gourds which were once imported into the U.S.

Price

Apparently the price of Jamaican gourds is remarkably lower than any domestically grown decorative gourd in the U.S. Adding value to the gourds by carving or painting them increases their marketability. The prices appeared reasonable in the Jamaican market place.

Quality

The quality of the calabash products is reasonably good, especially for the price point. The quality of carving and painting has its imperfections, but it adds to the spontaneous nature of the product. To insure quality for export, the calabash products need to be tested for how they stand up to significant changes in temperature and humidity. If they easily crack, then the gourds must be treated to resist cracking.

Production

Given the large quantity of calabash products in the marketplace, production should not be a significant problem. Many of the calabash products are identical. Producers who paint gourds paint them in similar patterns. Production needs to be organized. From the few artisans that were questioned, the supply of calabash gourds is more than adequate to handle greater production, however the supply needs to be investigated.

Product Development

The product development opportunities for calabash are extensive. Product lines could be developed for new product categories such as jewelry, decorative

accessories, lighting, and garden. Also, calabash will lend itself to unique new packaging products for the food, aromatherapy and bath markets.

In addition to the unfinished and brightly painted colorways, a line of natural soft-color dyes could be tested on calabash. A leading U.S. dye specialist claims that calabash should accept natural dyes well. A new color pallet of moss green, amber, rose, indigo and other should be tested on the calabash.

Brightly painted calabash gourds could be marketed as decorative balls. The market for unique decorative balls to be displayed in baskets or ceramic platters is strong. The calabash gourds could be painted with floral motifs, geometric patterns or and plain colors. Three collections could be offered, including brightly colored, natural dyed and unfinished gourds. The gourds can be packaged in sets of 4 or 6, or sold individually.

By weaving straw bases, calabash gourds can be developed into functional holders. Lids fixed with straw or wood handles can create new box shapes and containers. Without a lid, gourds can be offered as small dishes and bowls to hold knickknacks, jewelry or loose change.

The existing calabash bags are attractive, but additional products need to be added to the line. Combining calabash embellishment onto plain straw bags, or making smaller calabash containers to hold coin change, lipsticks and other small sundries.

Decorative ornaments can be created by cutting the gourds into clever shapes and sizes. The three finishes and carvings can be applied. The ornaments can be marketed as Christmas ornaments or decorative embellishments for packaging, apparel, hats, baskets, etc. Buttons, earrings, windchimes, mobiles and more can be assembled from the ornaments. Select themes should form the basis for collections of 6 or more ornaments. Some themes might be indigenous Jamaican flowers painted onto gourds cut out in flower shapes, carved geometric patterns on different unique shapes of gourds, fish shaped gourds which are carved, or painted or dyes, sea shells, etc.

Market Outlet

With tropical themes and colors, the gourds can be marketed in the beach and resort towns in the U.S., Jamaican and the CARICOM islands. Functional boxes and containers are a natural product for the packaging market and for the U.S. gift and decorative accessories market.

For the export market, attention needs to be drawn to the environmental impact of using the gourds -- renewable, sustainable natural resource, doesn't harm the trees, etc. This environmental impact is especially important to the

aromatherapy and bath markets where customers pay attention to the source of the materials

For the export market, gardening, packaging, and decorative gifts are obvious outlets for the calabash products. In a previous craft development project, specially design gourd containers for potpourri have enjoyed considerable success in the U S gift market

5 BAMBOO

Design

The selection of bamboo products available in Jamaica is limited, but the potential is strong. The existing products are cleverly designed, such as small bags and decorative containers, as well as a line of bamboo furniture. Given the growing popularity of bamboo in the U S market, and the apparent availability of bamboo in Jamaica, bamboo products seem to be a good product to concentrate on for export.

The bamboo containers currently available are decorating with simple geometric patterns. The products are either left unfinished, or else finished with Kiwi shoe polish which gives the bamboo a leather effect. Unfortunately, the bamboo furniture was not seen during this consultancy, but apparently the line is enjoying favorable acceptance in the domestic hotel and resort market.

Price

The price of existing products is reasonable for the local markets. Export pricing needs to be carefully evaluated.

Quality

The quality of the bamboo products seen in the market place is good for a mass market product. Some attention needs to be placed on using proper dyes and finishes, and attaching knobs and straps more effectively.

Production

The current production of bamboo products is limited due to the number of producers, the size of workshops and the current organization of production. Given the supply of bamboo and the relatively simple designs of the bamboo products, the producers and materials are available and just need to be organized and expanded. There were some comments that the quality of Jamaican bamboo is inferior to Asian bamboo. The more pertinent question to be answered is whether Jamaican bamboo's quality adversely effects its use as furniture and/or decorative accessories.

Product Development

Product development for bamboo holds great opportunities. For one, new finishes can be applied, such as natural dyes or painted finishes. The bamboo can also be left unfinished, or patterned with carved designs.

Furniture lines should include furniture accents such as lamps, small tables, decorative chairs, trunks, trays and other products. Accent furniture is a popular mail-order catalogue item, but must fit within the UPS shipping guidelines for size and weight. Rather than re-furnish an entire room, U S customers are routinely outfitting rooms with new accent pieces. Ballard Designs catalogue offers an overview of home furnishing accents which hold strong marketing potential.

Building on the existing bamboo containers, a desk set collection of products can be developed. A desk set could include a low box (2" high), a taller container for pens and pencils (5" high), a small, uncovered dish for coins and paper clips, a pencil box, a notepad blotter. Bamboo can be flattened to create an unusual splintered wood effect. This could be applied to the border of a notepad blotter. The flattened bamboo could also be applied to a desk frame.

The gardening market may hold great potential for bamboo. Bamboo containers, baskets, birdhouse and tablemats could be used in outdoor setting. Baskets to hold potted plants, or cut flowers, or baskets to hold gardening tools could be marketed. Gardening baskets should be rugged and durable, made out of plaited bamboo slats.

One limitation to the export potential of bamboo is that bamboo, unlike rattan, is especially vulnerable to insect damage, such as powder post beetles, and export shipments require fumigation.

Market Outlet

The strongest potential for bamboo products lies in the home furnishings, gift and gardening markets. The domestic packaging markets should be investigated.

6 TEXTILES

Design

There is a significant supply of hand-embroidered table linens available in Jamaica. Unfortunately, the embroidered patterns, nor the quality are particularly inspiring. Christmas themes, poinsettias and holly were prevalent.

Other textile products include clothing, quilts, pillows, children's clothing and accessories made out of batik and other cotton fabrics. The batik patterns and

technique are similar to the fabrics found in West Africa. In fact, much of the batik fabric available in Jamaica is imported from Ghana. Most of the textile products do not have distinct design elements to compete in the export market. Apparently, there are several sewing factories which provide production to U S apparel companies, but most of the products seen in the craft market were made by individual home sewers.

One line of brightly color decorative quilts with tropical and abstract motifs holds true design potential. The patterns and colors are superb for a Caribbean, lively pattern.

Price

The price of most embroidered linens are prohibitively high for the export market given that neither the designs, nor the quality are comparable to the Asian-made linens, but the price is considerably higher.

The batik products are well priced for the domestic market, but could not compete for export without serious price reduction.

The brightly colored quilts are currently priced as one-of-a-kind pieces. With some modification of design and organized products, the price could be significantly reduced to compete in an export market.

Quality

The quality of the embroidered linens is marginal. The batik and other sewn products are not professional quality, but rather show the effects of being "hand-made". While this adds a certain charm, it is not marketable for export.

Production

Apparently the sewing production capacity in Jamaica is well organized. U S apparel companies are sourcing production of fashion garments from Jamaica. But the cottage-industry sewing sector appears to be limited to very small production units, such as individual home sewers or some contract piece workers. The number of home sewers is large as evidenced by the number of textile products and exhibitors at the craft fair.

If production is to be expanded, training in quality control and better production techniques should be provided.

Product Development

Given that the export potential of textile products is limited, there are not many product development suggestions offered. Embroidered patterns may experiment with more refined Jamaican images such as the Blue Mountain, palm trees, misty mountain tops, etc. For the aromatherapy market, hand-embroidered sachets filled with potpourri could be marketable.

Resort wear is a popular market for Jamaica and CARICOM islands. The African batik fabric lend themselves to the resort wear market. Loose fitting sarongs, Hawaiian-style shirts, shorts, unisex, baggy sizes, matching beach tote bags, etc. The market should be investigated. Are there ample Jamaican made fashionable resort fashion accessories and clothing available in the tourist market?

The brightly colored Caribbean quilts show significant design potential. A line of home furnishings, including products for children such as children's quilts, crib bumpers, diaper bags, tote bags, bedding and pillows, could be developed based on the existing designs.

Market Outlet

The embroidered linen products may find a market outlet in the upscale hotels and resorts by providing exclusive designed table linens and hand towels. Also, the food packaging market may wish to include hand-embroidered linens in some of the more refined gift food baskets.

The brightly colored quilts are highly marketable in the children's market, the beach and resort market, and the high-quality gift and home furnishings market.

7 OTHER AROMATHERAPY AND GOURMET FOOD

While not traditional craft items, both aromatherapy and gourmet food products offer an opportunity for craft producers to provide unique, high-quality, distinctly Jamaican packaging products. These products are also marketable in the U S gift market where most Jamaican craft products should be targeted.

The aromatherapy and gourmet food products available in Jamaica are already well presented, high-quality and reasonable priced. With some additional value added through attractive packaging, finished gift baskets and packages could be very marketable in both the local tourist markets and the export markets. The finished gift baskets are a must-have for all exit points, such as cruise docks and airports.