



MINISTRY OF INDUSTRIALISATION,
TRADE AND SME DEVELOPMENT

Growth Strategy for Namibia's Handicraft Industry and Associated Value Chains





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FOREWORD



The Industry Growth Programme is part of the ongoing efforts to reinforce Namibia's economic growth, to reduce income inequality and to increase employment for its citizens. This Industry Growth Strategy forms part of the support to selected manufacturing industries envisaged by the Growth at Home strategy, which promotes Namibia's competitive advantages and opportunities. This is envisaged through the Special Industrialisation Programme whose aim is to provide targeted support for value chain analyses and feasibility studies.

It is through the implementation of this and other strategies that the Ministry of Industrialisation, Trade and SME Development, in close cooperation with other line ministries, will support local value addition, upgrading and economic diversification. The efforts will help to structurally transform Namibia's economy favouring the most productive and efficient economic activities, and local industries will be provided with improved market access at home and abroad.

The Industry Growth Programme is an important element of the war against poverty and a further step on Namibia's path towards becoming a highly competitive, industrialised nation with sustainable economic growth as depicted in Vision 2030. As such, this strategy's implementation through 2020 is geared towards strength-

ening forward and backward linkages within the Namibian economy as envisaged in the Harambee Prosperity Plan.

Handicraft is a strategic industry that has, in agreement with the fourth National Development Plan, been selected for a more specific focus on its economic development. Key stakeholders from the business community and public administration who have a vested interest in the Namibian industry's prosperity for the benefit of all have engaged in extensive consultations and substantially contributed to this programme. They are now eager to implement interventions along the value chain effectively.

Many of the suggestions and concerns raised by entrepreneurs and civil servants in extensive discussions have been distilled into this document. This interactive process has once more demonstrated that Namibians together can shape an enabling environment in which the manufacturing sector can thrive and the wellbeing of the Namibian people be advanced.

I am sure that the Industry Growth Strategies have the potential to remove challenges and accelerate economic development in the prioritised areas. The interventions planned for 2016 onwards will allow the targeted industries to prosper according to their inherent abilities. This strategy is a living document. As such, additional comments or remarks from stakeholders are welcome and can be addressed to the Ministry of Industrialisation, Trade and SME Development.

I am confident that, in the vein of the Harambee Prosperity Plan, all stakeholders involved will pull in the same direction in the upcoming implementation phase – as they have done in strategy building – for the advantage of a thriving Namibian economy that creates jobs, incomes and sustainable growth.

Hon. Immanuel Ngatjizeko
Minister of Industrialisation, Trade and SME Development

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ACRONYMS AND ABBREVIATIONS

BoN	Bank of Namibia
CBI	Centre for the Promotion of Imports
CBNRM	Community Based Natural Resource Management
CBTE	Community Based Tourism Enterprise
CESP	Community Enterprise Support Project
COMESA	Common Market for Eastern and Southern Africa
COSDEC	Community Skills Development Centre
CoTA	College of the Arts
CoW	City of Windhoek
CSR	Corporate Social Responsibility
EAC	East African Community
FES	Friedrich Ebert Stiftung
FMD	Foot and Mouth Disease
GDP	Gross Domestic Product
GRN	Government of the Republic of Namibia
HS	Harmonized Commodity Description and Coding System
ISIC	International Standard Industrial Classification for all Economic Activities
JMAC	John Muafangejo Art Centre
KAYEC	Katutura Youth Enterprise Centre
LIPROSAN	Livelihood Program for Okongo San Resettlement Projects
LISUP	Livelihood Support Programme
MAWF	Ministry of Agriculture, Water and Forestry
MCA	Millenium Challenge Account
MEAC	Ministry of Education, Arts and Culture
MET	Ministry of Environment and Tourism
MITSMED	Ministry of Industrialisation, Trade and SME Development
MoF	Ministry of Finance
MSME	Micro, Small, and Medium Enterprise
NAD	Namibia Dollar
NDC	Namibia Development Corporation
NCCI	Namibia Chamber of Commerce and Industry
NMA	Namibia Manufacturers Association
NQA	Namibia Qualifications Authority
NTA	Namibia Training Authority
NTB	Namibia Tourism Board
NUST	Namibia University of Science and Technology
PVC	Polyvinylchloride
SME	Small and Medium Enterprise
TUCSIN	The University Centre for Studies in Namibia
UNAM	University of Namibia
VAT	Value Added Tax
VTC	Vocational Training Centre



1. NAMIBIA'S HANDICRAFT INDUSTRY AND ITS VALUE CHAIN



1. NAMIBIA'S HANDICRAFT INDUSTRY AND ITS VALUE CHAIN

1.1 Industry Definition

During a workshop in October 2015, the following definition was agreed upon by stakeholders in the Namibian handicraft industry to reflect its specific conditions: Craft is the production of a broad range of traditional and contemporary items, made predominantly by hand as individual pieces, utilising rudimentary tools and uncomplicated or traditional skills and involving some combination of functional, aesthetic, innovative, decorative and cultural traditions; heritage; and sometimes religious significance. The essential character and integrity of the product is derived from the handmade aspect of its creation and its being done on a small scale, with hand processes part of the value-added content. Individual artisanship, design and personal expression; the skill of the producers and their in-depth understanding of and engagement with the raw materials; the technique; and the significance of the item result in each piece's individuality. Raw materials broadly include wood, clay, natural fibres and plant materials, beads, stones, leather, fabric, wool, metal and paper.

Most researchers acknowledge that the lack of consensus on the definition of handicrafts is a major problem in tracing the development of handicraft production as a recognised industry and that it limits data collection that would provide information on the economic significance of the sector.

Economic activities related to the manufacturing of handicrafts are not classified separately in the International Standard Industrial Classification of all economic activities (ISIC), nor are handicraft products identified separately in the main international system for trade statistics, the Harmonized Commodity Description and Coding System (HS). The difficulty has been to identify criteria that can be applied uniformly to distinguish handicraft production from industrial production and handicraft products from their machine-made coun-

terparts. As most artisanal products manufactured and exported today are not independently counted in international production and trade statistics, reliable production and trade data at an international level do not exist. Thus, the handicraft industry and its contribution to international trade flows are largely invisible. Handicraft production and trade data are sometimes available for individual countries if governments make an effort to track them; however, international comparisons and analyses of trade flows are complicated (USAID, Global Market Assessment for Handicrafts, 2006).


From the end-market perspective, the key market for handicraft products is home accessories, also referred to as "home décor", which tends to overlap with the "gifts" and "garden" product categories. It is not easy to determine the share and contribution of handmade versus machine-made products within these markets. Despite this limitation, most comparative studies use market data for home accessories as a proxy for the handicraft sector, primarily because limited statistics exist globally for the handicraft market.

1.2 Global and Regional Industry Performance

While China and India have been dominating handicraft production worldwide in recent years (USAID, 2006), countries like Mexico and Morocco have actively developed the economic potential of their respective handicraft sectors. Whilst these strategies have varied considerably, the common denominators have been having a strategy in place and governmental support. In a number of cases, the focus has been on the development of a particular product category or process, such as hand weaving in Ethiopia. However, the success of the strategies employed has been largely dependent on sustained support and intervention from government, as well as financial assistance.

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“Several African producers – Ghana, South Africa, Mozambique, Malawi, Kenya and Tanzania – offer a number of successful handicraft products on the world market. In the opinion of market experts, South Africa and Ghana have the highest export capacity and most competitive designs and quality. Their success is based on consistent delivery and the ability to sustain sales based on established relationships” (USAID, 2006).

In the southern African region, the growth of tourism has been and continues to be the most important driver of growth for the handicraft industry. Tourism growth in South Africa, Botswana, and Zambia is interlinked with the development of the craft sector. Whilst Zambia does not have a specific strategy in place, both South Africa and Botswana have recognised the importance of the industry and have concurrently implemented specific programmes and/or programmes that are aligned and synergised with the craft sector.

1.3 Industry Background and Evolution in Namibia

For centuries, the traditional production of handicrafts served utilitarian and cultural purposes and was linked to individual tribal identities in communal areas.

In the early 19th century, European traders sought handicraft products for collectors, through whom artefacts were filtered into the growing network of European and South African museums. Early records of crafts are found in journals, photographic publications and mythology.

A few years preceding Namibian independence, remote areas such as the Kunene region were frequented by mining prospectors and explorers. As tourism increased, craft “exchanges” for essential items took place. Under the colonial administration, the significance of heritage was given recognition. First, the possibility of producing traditionally made items from natural resources on a commercial basis for the modern urban market and the

growing tourist market came up. NGOs, e.g. UDO Trust, ENOK and the Save the Rhino Trust, initiated interest in handicraft, which evolved into the establishment of craft outlets. Crafts were most often produced and sold on an individual basis. Sometimes artisans worked together in informal groups, more for social purposes than as a production strategy. Crafts were produced as a supplementary activity, to gain cash when there were no other agricultural or household demands on the producer. The output was commonly sporadic and varied in quality.

Around the time of independence, it was acknowledged that the handicraft sector might need development assistance and promotion to bring it to its full potential. The involvement of various organisations, especially NGOs with the assistance of donor funding, increased and led to growth of the craft sector. Since the mid-1980s, after independence, various agents have provided resources to grow the sector: MITSMED (then MTI), CBI of the Netherlands, GIZ (then GTZ), LIFE Project, CESP, MCA Namibia, SMEs Compete, the Rössing Foundation, LISUP and LIPROSAN, and various ministries, National Arts Council and Arts and Crafts Guild, Omba Arts Trust, Pambili, Penduka, Women’s Action for Development, various CBNR support organisations, etc. These agencies have supported product developers locally and internationally, put up infrastructure, and funded training, mentoring and marketing. New forms and decorations have been added to the repertoire of traditional styles. However, in those days the export market for traditional and contemporary crafts was virtually untouched.

Since the 1990s, there has been a growing recognition of the importance of intangible cultural heritage and the significance of indigenous knowledge. Handicraft as a form of income expanded as multisectoral development (government, NGOs, private sector) took place. There were dedicated efforts by key players which developed the domain into pockets of achievement. With the awareness that crafts can provide a reasonable income, some producers started to take on the work as an

almost full-time occupation. Small-scale entrepreneurial businesses and formal production groups were still seldom found in Namibia. Through community-based natural resource management (CBNRM) and conservancy initiatives, tourism increased and communities realised the opportunities afforded through handicraft production.

In 2008, the third National Development Plan identified “cultural villages” as vehicles for safeguarding indigenous cultural heritage, initially and predominantly, although not exclusively, in Himba and San communities.

The Namibia Crafts Centre has tripled in size since it was started around 1995 and enjoys over 45,000 visitors a year, and there have been many successes, but there have been as many SMEs that have opened and closed in the centre over the years.

Informal markets around the country have grown, as has formal market infrastructure through conservancies and other initiatives. The Ministry of Industrialisation, Trade and SME Development has been supporting export initiatives by taking people to trade shows for the past 20 years.

Today, there are pockets of success and even excellence, but overall many initiatives started in the past two decades are not working optimally and/or have closed down.

In 2015, the distribution of handicraft producers in Namibia according to region and gender was depicted in a survey of 3,158 producers conducted by Symonds and Louw:

Table 1: Number of Namibian producers

Registered by region	Number of producers		
	Female	Male	TOTAL
Oshana	408	57	465
Omusati	19	55	74
Ohangwena	6	11	17
Oshikoto	54	52	106
Zambezi	251	26	277
Kavango East & West	385	141	526
//Kharas	31	28	59
Hardap	7	6	13
Omaheke	115	16	131
Kunene	122	71	193
Erongo	42	38	80
Otjozondjupa	530	84	614
Khomas	528	75	603
Namibia	2498	660	3158

Source: Symonds & Louw, 2015

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1.4 Classification of Namibian Producers and Businesses

According to the survey of 2015, handicraft production, though established throughout the country, has a particularly strong foothold in the Oshana, Kavango, Otjozondjupa and Khomas regions, which together account for 70% of the registered artisans in Namibia. Unlike other industries, handicraft production is dominated by female artisans, 80% of all registered craftspeople at MITSMED being women.

In the same survey, 171 producers and producer groups were interviewed. They were asked what type of business operators they were. The classification of handicraft businesses is depicted in Figure 1.

Namibian Handicraft Business Operators

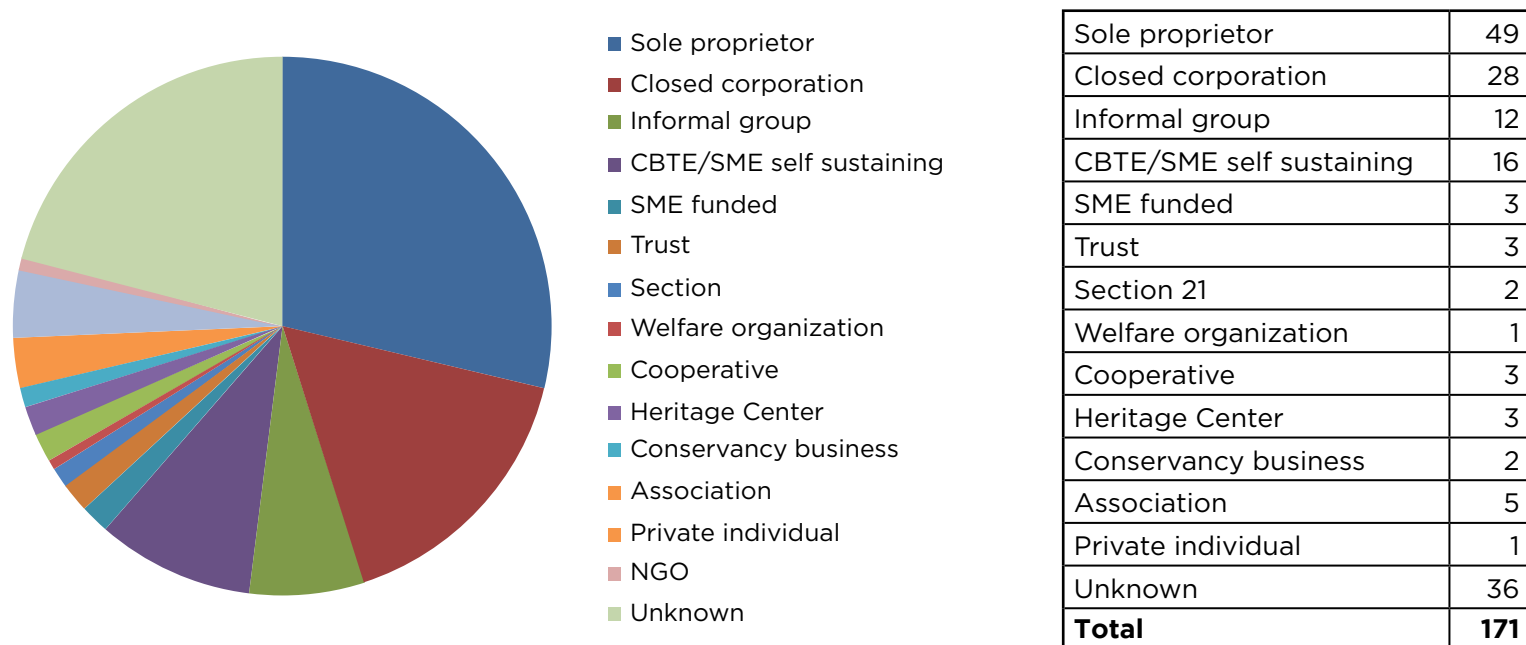


Figure 1: Types of business operators
Source: Symonds & Louw, 2015

28% of the businesses were individuals operating as sole proprietors, in theory registered with the Ministry of Finance, though some may not have been due to their small size. The producers were not asked to disclose confidential information. 16% were formally registered as closed corporations. These were generally found to have had close links with MITSMED or donor support in the past, which might have encouraged them to register more formally. 7% defined themselves as informal groups who work together on an ad hoc basis without formal conditions or structures. 9% were more formally structured community-based tourism enterprises (CBTE), the majority of whom started out with donor funding and have become self-sustaining. 1.7% of the

respondents were SMEs that still received funding, and 7.6% were trusts, Section 21 companies, welfare organisations, cooperatives, NGOs and heritage businesses registered with the Ministry of Finance and producing annual accounts. Two conservancy businesses and five associations provided annual financial records to their committees or boards. The private individuals operated on a more hand-to-mouth basis, selling handicrafts on an ad hoc basis or when opportunities arose.

The following classifications of the usually small, informal and generally unregistered craft enterprises help define their business scope in terms of annual turnover:

Table 2: Size of Namibian businesses

Size of Business					Responses
	Femto	Pico	Nano	Total	
Oshana	2	2	1	5	5 of 6
Omusati	4	0	0	4	4 of 8
Ohangwena	0	2	0	2	1 of 1
Oshikoto	3	1	0	4	4 of 11
Zambezi	5	4	2	10	10 of 10
Kavango East and West	2	3	1	6	6 of 23
//Kharas	2	0	1	3	3 of 6
Hardap	1	2	1	4	4 of 7
Omaheke	1	2	2	5	5 of 7
Kunene	0	2	1	3	3 of 13
Erongo	7	3	4	14	14 of 16
Otjozondjupa	3	4	3	10	10 of 12
Khomas	9	15	12	36	36 of 51
Total	39	39	27	105	

Turnover (NAD)	
100-1000	Femto
1000-5000	
500-20,000	
20,000-50,000	Pico
50,000-100,000	
>100,000	Nano

Source: Symonds & Louw, 2015





Of the 171 interviewed, 105 producers or producer groups responded to the question on turnover. Some preferred to treat their turnover as confidential. Classifications have been made according to indications of turnover p.a. in Namibian dollars. Micro-enterprises, as defined under the National Policy on MSME in Namibia (Zero Draft, 2015), are characterised by an annual turnover of up to NAD 300,000. For the purpose of the survey and to provide greater insight into the current production and sales capacity of the local handicraft operations, the MSME definition was further subdivided into the smaller categories femto, pico and nano, operating with annual turnover between NAD 100 and NAD 300,000. Just over one third of the craft businesses examined indicated a marginal turnover (under NAD 20,000/year) and a further third an annual turnover of NAD 100,000 or less. Since only a

portion of this, on average between 30 and 40%, is profit, the pico and femto businesses can be considered to have a marginal impact on the income of artisans and their families.

However, it must be taken into account that along with the producers and producer groups described above, the industry also includes other businesses: NGOs/social enterprises and even local retailers and wholesalers. While these are mapped in Section 2 of this strategy and without any doubt are significant stakeholders in the industry, no data on them is currently available.

Most craft producers are based in the capital and in the communal areas in the north. Conservancies discussed in the Conservancy Reports are those in communal areas.

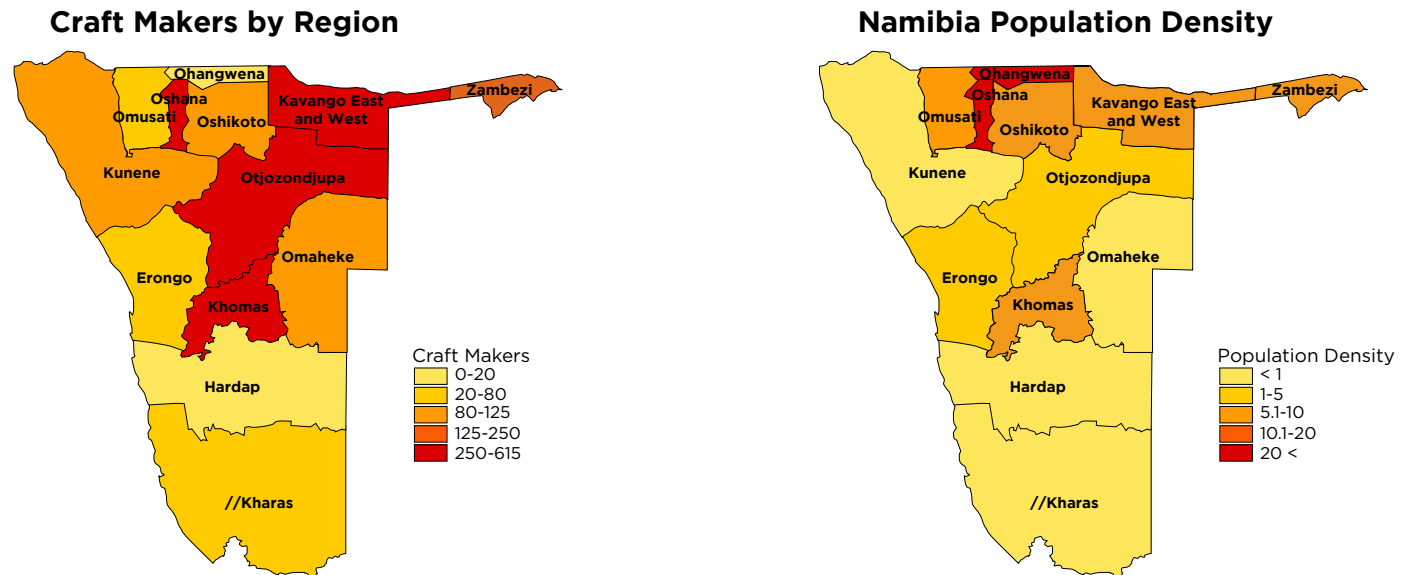


Figure 2: Craft makers by region and population density
Source: Symonds & Louw, 2015

Greater numbers of craft producers are found in the central and north-eastern regions, and in the Oshana region, the towns of Ondangwa and Oshakati support many craft outlets and markets. This distribution is indicative of the disparate nature of the sector and associated logistical challenges. On the whole, the density of craft producers mirrors population density.

In many instances, producers sell their own products, many along the roadside or informally from home. Where sales staff were employed or other employees paid to run a craft business, these were noted in the Sept./Oct. 2015 survey and are represented in the following table.

Table 3: Employees at craft enterprises throughout Namibia

	Number of employees			Responses
	Full time	Part time	Total	
Oshana	2	3	5	4 of 6
Omusati	4	0	4	3 of 8
Ohangwena	0	0	0	0 of 1
Oshikoto	16	11	27	6 of 10
Zambezi	14	1	15	6 of 8
Kavango East & West	16	4	20	4 of 23
//Kharas	0	0	0	0 of 6
Hardap	0	10	10	1 of 4
Omaheke	24	250	274	2 of 6
Kunene	2	3	5	3 of 13
Erongo	4	2	6	4 of 13
Otjozondjupa	9	0	9	5 of 11
Khomas	23	47	70	19 of 50
Total	114	331	445	

Source: Symonds & Louw, 2015

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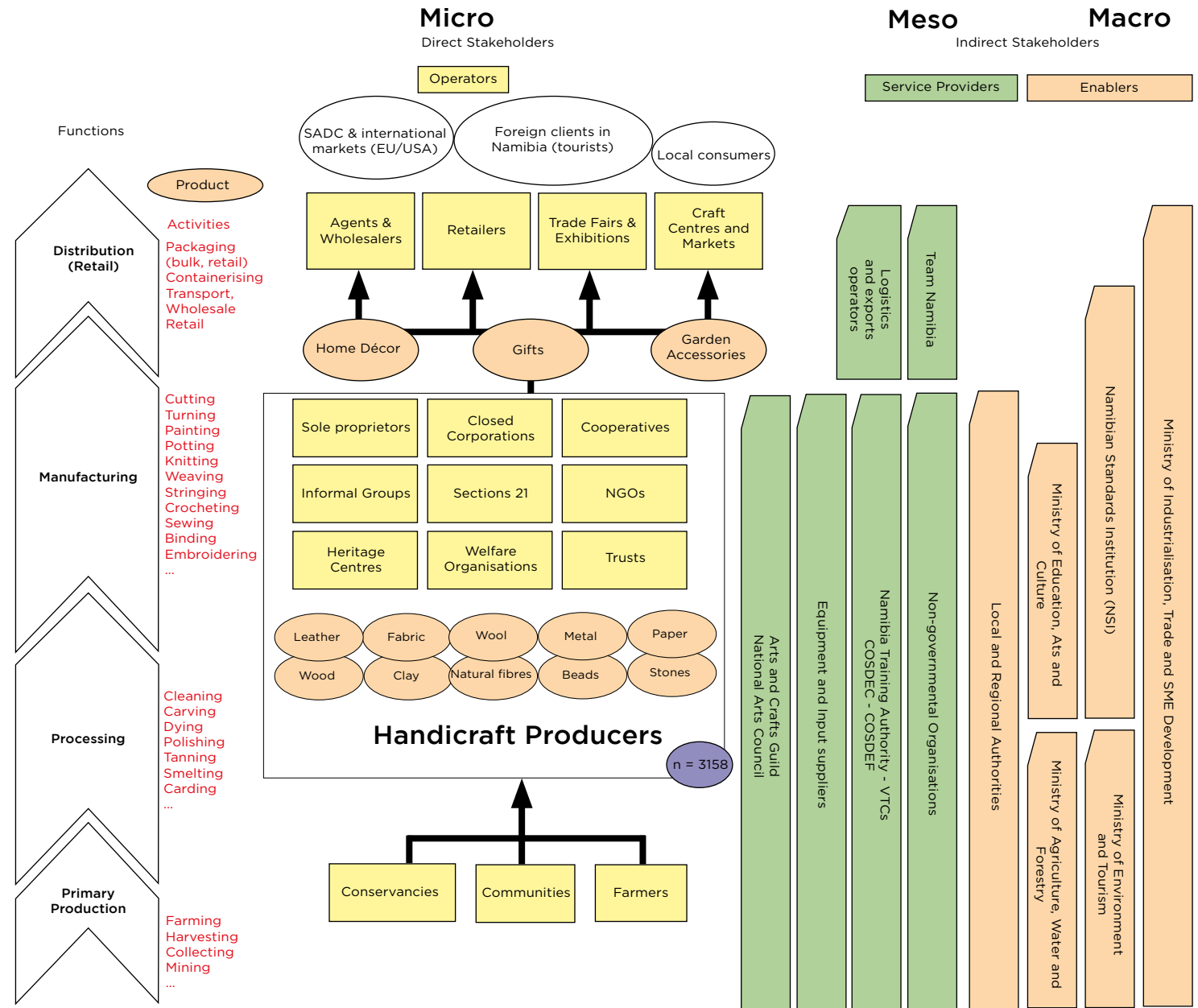


Figure 3: Value chain map handicraft
Source: GIZ ProCOM, based on information by Open Doorz, 2016

1.5 Classification of Namibian Products

Namibian handicrafts were grouped into the following 12 product categories for the purpose of the value-chain analysis that formed the baseline for this Growth Strategy. For promotional and marketing purposes, it is useful to classify products by end use. However, in a producer directory and product catalogue, the products have been further classified by raw material, since producers tend to work with one or two base raw materials.

Textiles

- Hand-woven textiles, beaded fabric, batik, painting, embroidery, felting, bunting

Jewellery (predominantly beads, leather, metal, gemstones, natural resources and recycled materials)

- Glass beads, leather, metal, gemstones, ostrich eggs, natural resources, makalani, ekipa, Omba, PVC

Basketry (palm and other natural resources)

- Palm, Combretum, Khoe, Himba, waste-paper baskets, non-traditional baskets, chitenge-fabric baskets, other natural resources, plastic, wire

Pottery (clay)

- Clay pots, vases and vessels, functional items

Woodwork and natural materials (predominantly wood, metal and natural resources)

- Animal carvings and figures, ornaments, bowls and cups, cutlery, bows, arrows etc., painted birds and other characters, frames, root carvings, musical instruments (drums, mbira), weapons and tools (spears, axes and adzes, knives and sheaths), fish traps, reed mats, makalani products, monkey orange, seed decorations

Personal and fashion accessories (predominantly textiles, leather and beads)

- Bags, purses, wallets, hats, shoes, belts, headbands

Toys (predominantly wool and fabric)

- Dolls knitted and crocheted, dolls and animals of patchwork, dolls and animals of fabric, traditional (Herero, Himba, Damara) dolls, chitenge dolls, games, sling shots

Carpets, rugs and wall hangings (wool)

- Woven products

Stationery and paper products (paper)

- Paper, covered books, boxes etc., prints, postcards

Illustration (paper, leather)

- Lino cuts, drawings, designs to apply to other media, leather

Recycled (all manner from tins or wire to bottle tops and paper)

- Papier-mâché, fridge magnets, bowls, mirrors and frames, sundries, Christmas decorations, metal and beads, natural resources, recycled metal products, cars, key rings, mobiles, animal skins, mosaics, cell phone pouches, pet collars and beds

Artefacts

- Artefacts fall into two main categories: items with cultural and traditional significance not made for re-sale, and items produced for and sold into a tourism market.

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A community-based natural resource management programme is enabling new income opportunities for individual craft producers through the harvesting and sale of indigenous products and the commercialisation of craft production, providing opportunities to craft producers to derive cash income via conservancies.

1.6 Local Industry Performance

The gap between successful handicraft enterprises taking advantage of growing tourism and the more grassroots enterprises is widening. Research indicates that grassroots enterprises have neither had real-terms growth over the last 10 years and more, nor the means to capitalise on the tourism growth. The, mostly, grassroots enterprises have remained stuck in the production of traditional tourism products with very little innovation respecting product development, which renders the products 'dated'. The sector has had little input in the last few years. However, there are pockets of excellence, predominantly initiated by NGOs and private individuals, often farm-based projects. The majority, in particular individuals and older SMEs which once enjoyed NGO support but have since run dry, remain poorly resourced, with scant support, making little profit, largely dependent on the tourism trade and with little prospect for growth.

Many micro-enterprises, into which category all handicraft businesses fall, fail after a few years when left without advice and support. On an individual basis, the craft sector has a significant impact on livelihoods. It is widely known that income from this activity ranks second to the agricultural sector for the majority of rural Namibians.

The survey of the handicraft industry (Symonds & Louw, 2015) found that products are exported in bulk to retailers and wholesalers in South Africa, Angola, Finland, Sweden, the Netherlands, France, Germany, Austria, Switzerland, the Czech Republic, the USA, Australia, Japan and South Korea. Obviously, Namibian handicraft exporters are successful in foreign markets. They might become change agents for other players in the industry; however, while exact amounts are unknown, the authors state that exports only formed a small proportion of handicraft sales.

A community-based natural resource management (CB-NRM) programme is enabling new income opportunities for individual craft producers through the harvesting and sale of indigenous products and the commercialisation

of craft production, providing opportunities to craft producers to derive cash income via conservancies. A conservancy is a legally registered area with clearly defined borders and a management body run by the community for resident development and the sustainable use of wildlife and tourism. Handicraft enterprises in conservancies have experienced growth in absolute terms in the past 20 years but have not kept pace with inflation. With some fluctuation, income from crafts in Namibian conservancies amounted to around NAD 1.0 million over the years 2009 to 2013 (State of Conservancy report, 2014). These figures, however, also included income derived from non-Namibian products.

Other than these statistics, little information on income and turnover in handicrafts is available. This is partly due to the fact that handicrafts are not clearly distinguished from other products in trade statistics.

1.7 Global and Regional Demand for Products of the Industry

Though globalisation intensifies competition in the production of handicrafts, it also opens up new market opportunities. Overall, the demand for handmade goods has grown and will continue to grow (USAID, 2006).

Low-end and high-end markets are both expanding; the middle, with moderate quality at moderate prices, is fairly stagnant. Competition at the low end is strong and requires a significant production capacity. The high-end market focuses more on distinctive designs, higher quality, and smaller quantities with a greater flexibility in pricing.

Global growth is driven by two main factors:

- The growth in global tourism generally, and particularly in specific niche areas like cultural, fair-trade and sustainable tourism
- A growing market in developed countries for quality

handmade products with a 'story' for the interiors/décor/gift market

The growing trend in global developed markets in the mid to mid-high segment for home décor and interior products continues to be a big driver of the resurgence of the craft sector, for the following main reasons:

- A steadily growing interest in fair trade and the use of sustainable and organic materials in production
- The demand for developing-country country-of-origin products, which is projected to increase in line with the growth in traceability and CSR trends
- The important trend of conscious consumption – consumption of 'sustainable design' consumer goods and commodities has been increasing steadily over the last five to six years across Western Europe. From this point of view, the opportunity for developing-country producers and exporters is to provide products in a more socially and environmentally sustainable manner
- Increasing buying power through the value proposition of customisation and personalisation
- The rise of e-commerce.

Key markets for home accessory products are the USA, Germany, France, the UK, Spain, the Netherlands, Japan and Hong Kong, followed by a number of additional Western European countries. Some believe that China will not just be a strong exporter but also will become a strong market for handicrafts from developing countries.

Demand in Southern Africa

Due to its size, its history with Namibia and the associated growing tourism market and ease of logistics, South Africa (SA) is the most accessible foreign market at present. Nonetheless, Namibian craft products have a very low presence in South African tourism markets and a negligible presence in other Southern African (regional) countries, although there are market opportunities in Botswana, Zambia and even Mozambique. There has

been no research into EAC and COMESA markets. The focus is on SA at present and will remain so whilst there are few trade restrictions.

The SA tourism business landscape is very competitive, and Namibian products are almost non-existent in the regional home décor and interior market. Namibian products are mostly traditional – there are very few contemporary products – and as such mainly limited to mid-market tourism retail, with few products suitable for mid-high to high tourism. It is estimated that more than 90% of crafts made by grassroots producers are of traditional design and have been produced for a number of years without the introduction of new products, variations or styles.

Despite the lack of presence in the regional markets, most importers and retailers are open to stocking Namibian craft products, having had good experiences with the products they have carried in the past. These are unique, different, not currently overexposed and, according to informal sources, reasonably priced. Most of the current buyers in SA have engaged with the products via informal traders and would be happy to stock the products, but a formal supply structure (either an exporter in Namibia or an importer in SA) would be favoured. Market access could be obtained via appropriate trade shows such as SARCEA Trade Exhibition, pop-up initiatives and e-tail platforms.

Demand in the EU and the USA

The EU is one of the most lucrative markets for gifts and decorative articles and ranks among the top consumers of this product category in the global market. It is also the most accessible market in the world, offering preferential market access to developing countries.

Namibian products have a low presence in export markets and are almost non-existent in the home décor market. Since there is no sector brand footprint, most EU/USA buyers have no knowledge of Namibian crafts (no iconic pieces, visual reference/recognition or suc-

Most importers and retailers are open to stocking Namibian craft products, having had good experiences with the products they have carried in the past. These are unique, different, not currently overexposed and, according to informal sources, reasonably priced.



cess stories). Currently, small ranges are traded in niche specialty stores. These product ranges consist mostly of traditional products (basketry, ostrich-egg jewellery and PVC bangles). However, the 2015 survey found that importers and retailers are open to stocking Namibian craft products because they are unique, authentic and not overexposed.

The bulk importers that have engaged with Namibian products have done so mostly via informal middlemen (Levy, 2015). Some Namibian craft products are suitable for mid-high to high gift, ethnic, fair trade and Afrocentric retail and museum stores. This market niche is characterised by small order volumes, longer-term trading relationships and a commitment to supply and demand. Also, in these markets it has been expressed that traders would be happy to stock the products but would like a formal supply structure. Exposure and promotion could take place in these regions via trade fairs and suitable trade shows such as Ambiente in Frankfurt, the Santa Fe International Folk Art Market and NY Now – Artisan Resource.

In short, the main markets with the most potential for Namibian crafts/hand-made products in order of size and importance are:

- South Africa (regional)
- Namibia
- EU
- USA

There is unrealised potential in the market segments of tourism, gift retail and home décor/accessories for the South African market. With regard to the domestic Namibian market, which stockholders see as favourable, the tourism and lodge décor and expat segments are promising. According to Le Roux, some successful exporters of Namibian crafts in the past have turned away from export to expanding retail outlets in Namibia (NamCrafts, Casa Anin and Ichoba, to name a few). In both the EU

and the US markets, the fair trade, ethnic, gallery/gift and home accessories retail markets are auspicious. Local and regional markets can serve as springboards to the larger, more competitive ones.

Demand According to Price Segments

Along with regional distinctions, the demand for handicrafts can also be characterised according to individual product groups. USAID discern four basic artisan markets:

- Functional wares: Items made in a workshop or small factory that mass produces handmade goods such as pottery, tiles, or furniture for national or export markets
- Traditional art: Ethnic crafts marketed locally by creating interest in the culture and by maintaining high quality
- Designer goods: Sometimes based on local crafts but always redesigned by foreigners to suit fashion trends in the export market
- Souvenirs: Inexpensive, universal trinkets or simplified traditional crafts made for local retail or sold through international development agencies as tokens of good will

As quoted in USAID, 2006, “market experts agree that these are still the main market segments for handicraft products. Mass-produced functional goods fall mostly into the low-end market and are sold primarily through the big-box stores. Traditional art is usually higher in quality and sold in mid- to high-end markets, primarily in small chains and independent retail stores. Designer goods are typically sold in the high-end market segment by interior designers and high-end furniture and specialty stores. Souvenirs are mostly found in low-end markets at souvenir and gift shops in resort and vacation areas, and at some specialty stores and big-box chains”.

2. IDENTIFIED OPPORTUNITIES FOR AND CONSTRAINTS TO INDUSTRY GROWTH



2. IDENTIFIED OPPORTUNITIES FOR AND CONSTRAINTS TO INDUSTRY GROWTH

This chapter describes the identified constraints to and opportunities for the industry according to the analytical framework applied during the industry stakeholder engagements:

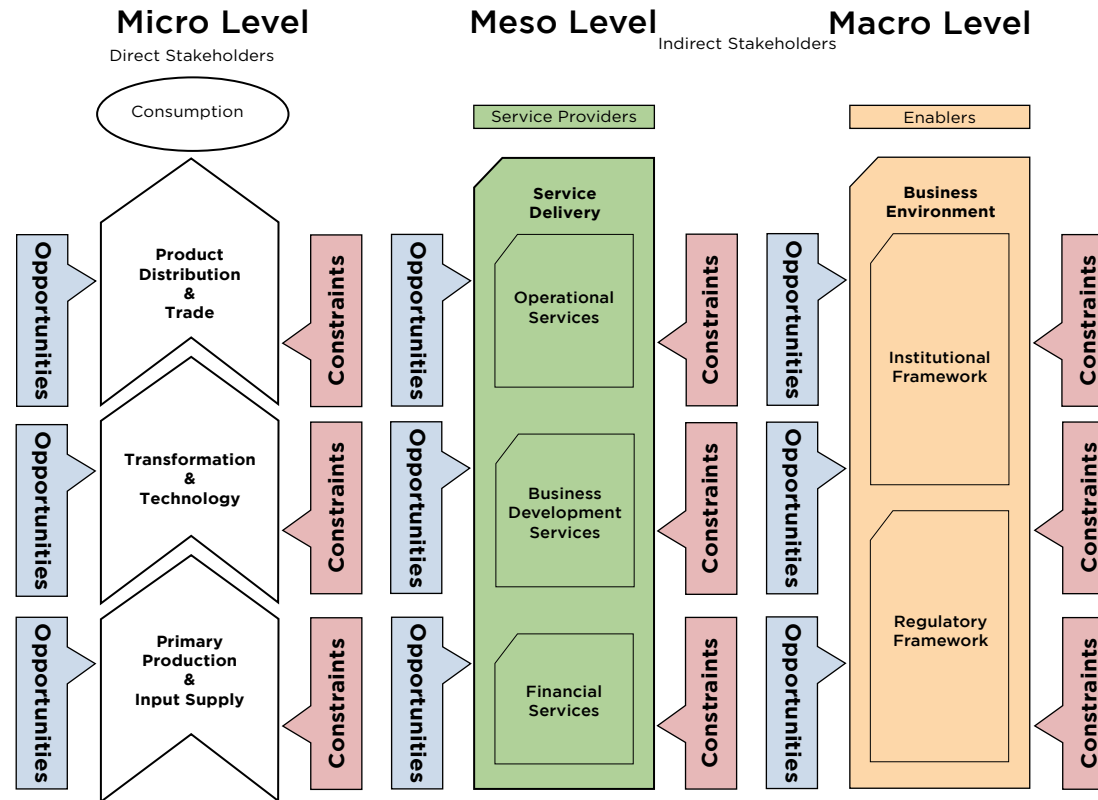


Figure 4: Analytical framework
Source: GIZ ProCOM

2.1 Primary Production and Input Supply

While raw materials can often be sourced in an environmentally sustainable way, there is a general lack of cooperation in the sector regarding joint sourcing of common inputs. Actors work as individuals and in isolation. Thus, economies of scale in the sourcing of raw materials are not achieved. Bulk buying and stockpiling of raw materials (and the availability of the necessary working capital) as well as joint sourcing of alternative materials would help artisans to overcome some of the problems related to inputs with seasonal and sporadic supply.

Lack of information, suboptimal supply-chain logistics and large transport distances all play a role in small-scale operations, acting as cost drivers and inhibitors to long-term growth. The provision of information and creation of distribution networks, institutionalised contacts and negotiations with suppliers on cost and delivery (e.g. through regular matchmaking events) would assist small craft enterprises in more efficiently sourcing and offering their products at more competitive prices.

2.2 Transformation and Technology

The strength of production in rural homes lies in self-sufficiency, requiring, on the whole, locally sourced natural or recycled raw materials and low-tech equipment. As the combination of local sourcing and low-tech production equipment does not require much capital outlay, processes can easily be rolled out to new producers. On the one hand, such low entry barriers make handicraft production a relevant strategy for income diversification for rural but also urban households, even when artisans operate on a seasonal or part-time basis. On the other hand, the atomised nature of the handicraft industry and the low level of industrial and general business development do not allow for productivity gains or economies of scale, severely limiting overall production capacities and growth perspectives at the business and industry levels.

As previously mentioned, access to bulk supplies is limited, which means that producers find it hard to maintain consistent quality and reliability of supply and to produce the quantities required in a given time period.

Consequently, the current production capacities of most individual producers and small artisan groups are neither big enough nor stable enough for exports; often, they are even insufficient for establishing business linkages with local traders (wholesale and retail).

On the positive side, small artisan groups are flexible enough to supply tailor-made or customised products specifically to order. Yet often not enough production is geared to customer needs and tastes; rather, it tends to be driven by supply. Adapting traditional designs to contemporary styling would be a way to align production to demand patterns, though these patterns are changing fast.

Productivity gains could be stimulated by technical benchmarking information and regular exchange among producers regarding technical and managerial skills and technology-related issues to improve production efficiency and enhance technologies.

Consumers' growing concern over fair labour practices, the safety and health of workers and environmentally sustainable production is becoming an important consideration for importers and retailers. For handicraft producers, this means improving production processes and paying attention to quality, safety, and working conditions. While it needs to be stated that rural access to electricity and water often is a challenge to producers, the low manufacturing footprint of production poses no environmental concerns.



A 'buy local' campaign could promote awareness of Namibian crafts at home and develop a sense of pride amongst national craft stakeholders.

Namibia has a strong and diverse indigenous cultural heritage which should be promoted with traditional handicrafts. Despite some interest from younger women given the unemployment situation, it is the older women in general who produce crafts. The younger generation are not taking up handicraft skills. The loss of traditional knowledge from different tribes and cultures is imminent. Thus, increasing awareness of the value of the sector and advocating for it as a source of income would help to realise the full potential of Namibian handicrafts.

2.3 Product Distribution and Trade

In the absence of a marketing strategy, only a few producers export, and they tend to have direct links to a given specific buyer overseas. A few sales to South Africa and overseas are facilitated by wholesalers, but in the main, production capacity and sometimes quality are too low and varied to sustain the export market. This is generally representative of the whole sector. The viability and end price do not seem to be constraining factors to the limited exports that do take place, but the challenges of export logistics and coordination from rural groups are a major barrier to exports. There has been very little research on domestic and export markets.

Producers rely on community-run craft centres, a few retail and wholesale buyers and lodges to access markets for them. Community-run enterprises tend to rely on customers finding them. Retail outlets and marketplaces are often poorly designed, merchandised and managed. Attendance at trade fairs attracts new customers, and yet more onus is placed on the buyer following up with the producer than on the producer chasing new opportunities.

The distribution chain is very short, with no middleman in almost all cases. In the world market, large and some mid-size retailers import directly, while small and many mid-size retailers continue to purchase merchandise principally from domestic wholesale importers. However, savvy small retailers can compete with distinctive,

high-end products. The vast majority of importers rely on the services of foreign exporters and agents (USAID, 2006). Many individual producers in Namibia sell at informal roadside stalls or local open markets, particularly on tourism routes where the emphasis is on products for local buyers rather than tourists. There are often great distances between producers and the market, which present costly logistical challenges. Large, direct-import retailers often operate in ways that present barriers to micro- and small enterprises. They typically require high production capacities, strict delivery dates and specific labelling and packing. Advance deposits are unusual, delayed payment terms are customary and charge-back penalties for mistakes are common. Quite a few wholesale importers order smaller quantities, offer prepayments to fund production with balances paid upon delivery and have fewer requirements that could result in charge-backs (USAID, 2006). The development of key regional centres where product could be collected and transported in bulk to wholesalers and retailers would be supportive in that regard.

Online stores or e-business are another opportunity to strengthen distribution channels, even if consumers often want to see and touch what they are buying.

Centralised wholesaling (including export agents) may mitigate bottlenecks in processing and manufacturing to some extent by holding stock to counter the irregular supply and fulfil orders. Long-term support for capacity building focused on (quality) production would help ensure sustained performance in the initiatives invested in. Assistance with developing business plans and marketing strategies, with clear targets and related incentives, would activate initiatives to sell.

Other opportunities identified were to develop and promote a brand for Namibian craft products, as most foreign buyers have no knowledge of innovative or traditional unique Namibian crafts; a 'buy local' campaign could promote awareness of Namibian crafts at home and develop a sense of pride amongst national craft stakeholders; recycled products might be promoted via eco-

awards; to promote sales, the industry needs to switch towards a demand-driven focus and develop a better understanding of business fundamentals and customer service; to counter the current lack of knowledge of the market/customer base, competitiveness, differentiation facilitating market access, market access in general and the regulations in place via centralised support services, a focus on disseminating research and information would result in more sales.

Training on marketing issues such as assessing and seizing market opportunities, costing and pricing/mark-up strategies, packaging and labelling, recycling opportunities, product innovation and design and intellectual property rights would address the current lack of innovative, authentic Namibian products. It is also essential to develop marketing links both locally and internationally, e.g. with tour operators and NTB, to realise exposure/public display and ultimately facilitate market access.

2.4 Service Delivery

Barriers to growing the craft sector are linked to skill gaps, inappropriate financial services and information deficits, e.g. on access to funding. Poor market access, infrastructure, quality and production also obstruct growth.

The following Namibian institutions offer support and training services to the craft sector:

- Craft Centres Windhoek, Opuwo, Swakopmund, Katima Mulilo
- NGOs and social enterprises like Ohandje Artists Co-operative, Mashie Crafts, Work with Our Hands, Omba Arts Trust, Onankali and Kalahari Wild Silk
- Arts and crafts training institutions like CoTA, JMAC, UNAM, NUST, COSDEC, Tsumeb Arts and Crafts Centre and Namibia Craft Centre
- Business-sector training institutions like SME Compete, Institute for Capacity Development, TUCSIN and VTCs
- Marketing institutions

- Financial institutions such as private banks, SME Bank, NamPro Fund, Namibia Development Fund
- SME Support via NCCI, NDC, NMA, SME Compete
- Local Authorities organising markets
- Namibia Tourism Board for sector promotion
- Recycling companies like Rent-a-Drum and municipal dumps.

Efforts to expand on existing institutes of learning, broadening their courses and curricula to include crafts and sector-specific support services, would help address the challenges that accompany low levels of business acumen and managerial skills. Training could be offered at the local level to make it more accessible to rural producers.

Donor conditions make it difficult for small businesses in the handicraft sector to access funding and support. Most individuals and SMEs in the sector are poorly resourced, with scant support. This is partly due to the fact that they are not aware of existing opportunities. Those donors that do provide support for business development – sometimes at no cost – usually do not work in conjunction with each other. In some instances, they duplicate or even counteract each other's efforts.

The creation of a sector body could help to promote Namibian crafts, disseminate relevant information, e.g. on access to financial support schemes, and work towards the development of policies that favour Namibian products. A sector body could facilitate events such as trade fairs and exhibitions and link small producer groups to business know-how for coaching and mentoring services. As such a body should address a broader range of issues and is a matter of institutional framework conditions, it is discussed in greater detail in the next section.



There also are many passionate individuals among NGOs/social enterprises, traders, training providers and producers who can make an impact on the industry as a whole.

2.5 Business Environment

Some framework conditions deserve to be deregulated or relaxed and barriers to entry removed or made appropriate for micro and small-scale businesses. For example, allowing MSMEs to register operation only with MITSMED rather than the Ministry of Finance for financial purposes and to simplify complicated tax or VAT systems should be considered. Also, preferential procurement policy could encourage buying of Namibian handicrafts. E-business should be facilitated to enable producers to access the online market.

Policies and systems are often suited to bigger businesses but not accessible to small-scale, informal enterprises. Studies could be carried out to ensure that the types of loans and grant packages offered meet user requirements. Tailored schemes should be developed and promoted to meet the needs of handicraft-sector actors who have no access to formal credit. For many

handicraft business owners, running a business is neither their passion nor within their skill set. Making distinction between a mere crafter and an entrepreneurial crafter is critical and should inform how support mechanisms like loans and grants are directed.

The handicraft industry in Namibia is fragmented, and many entrepreneurs operate in isolation. The weak institutional framework contributes to the failure of SMEs. There is no institution which can assist stakeholders with information, coordination and lobbying for the industry. Greater coordination in the sector would enable more entrepreneurs to experience market trends overseas and to liaise successfully with tourist operators to stock Namibian craft products, among other benefits. Yet there also are many passionate individuals among NGOs/social enterprises, traders, training providers and producers who can make an impact on the industry as a whole, especially if their coordination can be improved.

3. INDUSTRY GROWTH STRATEGY



3. INDUSTRY GROWTH STRATEGY

3.1 Vision of Industry Stakeholders

“By 2020, the Namibian craft sector will have, in a coordinated manner, created a footprint and identity and seized national and international markets whilst improving products, skills and artisan livelihoods.”

3.2 Industry Growth Indicators and Targets

- Namibian producers have increased export and domestic sales value) by X% between 2016 and 2020 (Base 2016: TBD; Target 2020: TBD; Data source: Export statistics/survey)
- Producer group turnover for selected products has increased by X% between 2016 and 2020 (Base 2016: TBD; Target 2020: TBD; Data source: survey)

3.3 Strategic Objectives, Indicators and Proposed Interventions

The stakeholders’ strategic focus, derived from the opportunities and constraints analysis, is on

- the development of markets with product innovation, design, branding and marketing Namibian handicraft,
- the preservation, uptake and upgrading of technical and entrepreneurial skills; access to and awareness of funding,
- a coordinated approach from key stakeholders to drive industry growth.

Accordingly, the stakeholders identified 3 core intervention areas as follows:

Intervention Area 1:
Product Distribution
and Trade

Intervention Area 2:
Service Delivery

Intervention Area 3:
Business Environment

Intervention Area 1: Product Distribution and Trade

Strategic Objective 1:

“To design and implement successful marketing support initiatives for a selected range of products and targeted market segments.”

Indicators and Targets:

- Number of handicraft products (re-)designed according to buyer preferences and target-market requirements (Base 2016: 0; Target 2020: TBD; Data source: survey)
- Sales increases for selected products which can be attributed to upgrading measures in selected distribution channels (e.g. local retail outlets, e-commerce, public procurement) (Base 2016: 0; Target 2020: TBD; Data source: survey)
- Number of industry stakeholders directly benefitting from new domestic sales and export support measures (Base 2016: 0; Target 2020: TBD; Data source: survey)
- Number of handicraft product lines recognised by traders (import agents, wholesalers and retailers) in targeted markets as typically Namibian (Base 2016: TBD; Target 2020: TBD; Data source: buyer survey)

Proposed Interventions:

Research on market opportunities

Research on Namibian market participants and products as well as on potential target markets (domestic and exports) would establish a baseline for strategic sales development. Market knowledge is low in the industry, as is marketing know-how. Producers often do not know the end markets into which their products flow, nor are they likely to have detailed information about demand trends and alternative distribution and retail channels. Having access to this information and targeting products toward a particular channel from the start can help increase access to markets (USAID, 2006). It can make producers aware of trends and provide ideas for unique products and market niches.

Undertaking a market supply-and-demand analysis is proposed.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED

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Market-based product development project

The product offerings do not always match lucrative market opportunities due to Namibian producers' limited exposure to innovative design and market trends.

It is proposed to identify promising product lines according to an assessment of buyer/trader requirements in targeted promising market segments (professional market studies and product evaluation), to render technical and financial support to targeted artisan groups in production-process (re-)engineering and product (re-)design, to organise business matchmaking spaces with potential buyers and to facilitate inclusive artisan-trader relationships.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED

Local product promotion

The recognition factor of innovative as well as traditional unique Namibian crafts is small, even though the products do have potential.

It is proposed to develop a brand for Namibian crafts and an overall promotion strategy to create a visible footprint and recognition of handicraft products with Namibian identity.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED

Upgrading of local retail facilities and handicraft sales points at strategic domestic locations

Retail outlets are often poorly designed, merchandised and managed. Rural producers, which make up the bulk of the sector, experience a number of specific challenges with access to markets. Reinforced public display is an opportunity for all producers to strengthen market success.

It is proposed to determine how existing outlets can be upgraded to improve utilisation of space, display, etc. and to potentially create new craft centres/outlets at key tourism junctions to provide an alternative outlet for rural craft producers. It is also proposed to negotiate with relevant stakeholders to facilitate the sale of crafts at outlets including NAC airports, municipalities (street markets) and NWR (national parks, hotels and lodges).

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED, MEAC, MET and NTB

Production of an export guide

So far, the presence of Namibian handicraft producers in export markets is low due to various factors. It is proposed to engage government in facilitating export of handicrafts through production of an export guide on, inter alia, how to identify markets, how to finance export transactions, methods of handling orders and shipments and relevant legislation.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED

Online sales solution

E-business is an opportunity to strengthen distribution channels.

It is proposed to engage with financial institutions about their support to online sales payments and to realise options with existing online stores.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED, Ministry of Finance, BoN

Preferential procurement for Namibian handicrafts

A preferential procurement policy would support the buying of Namibian handicrafts. It is proposed to develop a preferential procurement policy for national buildings, lodges and tourism hubs.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED, Ministry of Finance, NTF

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Intervention Area 2: Service Delivery

Strategic Objective 2:

*“Improve the access, coverage and impact of support services for artisans through new services and modes of delivery.
(Skills transfer to craft-industry stakeholders has improved in the technical and entrepreneurial courses of various institutions.)”*

Indicators and Targets:

- The number of artisans making use of additional support services has increased
(Base 2016: 0; Target 2020: TBD; Data source: survey)
- Business operations have improved due to additional service offers
(Base 2016: 0; Target 2020: at least 60% of beneficiaries of additional service offers confirm that their business operations have improved 60%; Data source: survey)
- Relevant information about access to funding is available and distributed
(Base 2016: TBD; Target 2020: an additional X% of producers confirm that they are knowledgeable about funding schemes for craft-sector development; Data source: survey)

Proposed Interventions:

Design and implementation/upgrading of regional handicraft growth centres

There are great distances between producers and input and product markets. At the same time, exposure to training facilities is a challenge for them.

It is proposed to create one-stop shops that function as wholesale depots for inputs and products, retail outlets and incubation centres (workshops, training and/or incubation space) in selected regional capitals (growth centre concept).

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED, MAWF

Business training and mentorship programme

The knowledge of business fundamentals and entrepreneurial skills needs improvement.

It is proposed to improve business management and marketing, product development and innovation, and quality-control skills through accredited courses with training institutions and to provide long-term mentorship (cf. OYETU Creative Craft Training and Mentoring Project) to craft makers.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED, MEAC, NTA, training institutions

Design and implementation of an NTA-accredited training offer for artisans to develop critical technical and entrepreneurial skills

The offering of certified training opportunities is not matching the industry's needs.

It is proposed to develop, offer and conduct NTA- accredited short courses on technical and business management skills for VTCs and other training institutions.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED, MEAC, COSDEC, NTA

Establishment of information services related to market and funding opportunities for artisans

A variety of market and funding opportunities are not made sufficiently transparent to potential beneficiaries. Small-scale informal enterprises in the craft industry often do not know about the financial support available to them.

It is proposed to collect and disseminate information on existing private and public funding schemes and application procedures and to disseminate relevant market information in adequate ways.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED

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Intervention Area 3: Business Environment

Strategic Objective 3:

“Facilitate closer interaction (exchange, coordination and cooperation) among industry stakeholders and provide strategic guidance to the sustainable development of Namibia’s handicraft industry.”

Indicators and Targets:

- A sector body coordinates the exchange among stakeholders and provides guidance to the industry
(Base 2016: 0; Target 2020: a sector body is established and regularly disseminates information and provides opportunities for exchange and strategic orientation to stakeholders; Data source: survey)
- A proposal for tailoring existing financing schemes for craft-industry support has been made to relevant public institutions/donors; existing schemes have been improved
(Base 2016: 0; Target 2020: at least X schemes have been improved according to the proposal; Data source: survey)
- Critical bottlenecks to industry growth have successfully been addressed through newly created mechanisms for stakeholder interaction
(Base 2016: 0; Target 2020: at least X critical bottlenecks have been removed through newly created mechanisms for stakeholder interaction according to stakeholder perceptions; Data source: survey)

Proposed Interventions:

Establishment of a sector body for coordination among stakeholders and to provide guidance to the industry

Due to the fragmented nature of the industry and a weak institutional framework, a body informing, assisting and representing the stakeholders is needed.

It is proposed to conduct research for a suitable role and structure of a sector body supporting and promoting the crafts industry in Namibia, incorporating lessons learned and best practices from similar institutions in Southern Africa and overseas.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMEDF

Tailoring of financial support schemes to prioritised needs and special conditions of the handi-craft industry

Financial support is often not accessible or appropriate to small-scale informal enterprises in the craft industry. It is proposed to research gaps in existing financing schemes (grants, loans), determining what is required, and to propose suitable changes to existing funding schemes to enable small groups and individuals to access funds.

Responsibility:

Steering Committee for the implementation of this Growth Strategy, MITSMED



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