BARBADOS PRIVATE SECTOR ASSOCIATION

BARBADOS PRIVATE SECTOR TRADE TEAM
A DIVISION OF THE BARBADOS PRIVATE SECTOR ASSOCIATION

EXPORTING TO THE EU

EXPORT GUIDE & ACTION PLAN

ARTS & ARTISANAL CRAFTS

IDB

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Introduction and Background

This export guide and action plan is one of a series of deliverables from the project *Building Private Sector Capacity to Increase Exports* sponsored by the Barbados Private Sector Association (BPSA), through the support of the Inter-American Development Bank (IDB). As the project title suggests, it is intended to elaborate possible opportunities for building export capacity among Barbadian producers to access the EU market, within the context of the Economic Partnership Agreement (EPA). Based on five months of extensive secondary research conducted in 2012, as well as consultations with Barbados based stakeholders and the Project Steering Committee, which is comprised of leading private sector associations, the research is part of a series of four projects that will strengthen the BPSA in its role as a key participant in public policy debates affecting private sector development; while increasing awareness of changes and challenges that confront the sector. The four component projects involve:

- Improving private sector development and competitiveness;
- Providing information on the challenges and opportunities of the EPA to business owners, managers and workers;
- Building capacity to increase exports; and
- Supporting the Institutional strengthening of the BPSA.

The purpose of this report is to propose an export guide and action plan for the enhanced positioning of the Barbados arts and artisanal crafts sector within the European Union (EU); in order to take advantage of the new market access opportunities created by the Economic Partnership Agreement (EPA). The EU is a unique economic and political partnership between 27 countries. Operating as a single market, the EU is a major world trading power with an estimated GDP of €12,268,387 million in 2010.[1] With just 7% of the world's population, the EU's trade with the rest of the world accounts for around 20% of global exports and imports. The EU is the world's biggest exporter and the second-biggest importer. Approximately two thirds of EU countries' total trade is done with other EU countries. The United States is its most important trading partner, followed by China.

This action plan is based on a sector study completed earlier with a special focus on the market prospects for Barbadian producers in the EU 27; including an assessment of the value chain for craft and the market opportunities and market access requirements for artisanal products, or handicraft. The research outcomes formed the basis of a focus group discussion with stakeholders, which was vital to the completion of the proposed action plan. The major focus of the earlier sector study and consultations was the compilation of technical regulations which Barbadian exporters of handicraft are required to meet in exploring their potential to export to the 27 member states of the EU. EU market requirements can be legal requirements or non-legal requirements. Legal requirements, otherwise known as technical regulations are trending towards harmonization across EU states and represent the

[1] http://europa.eu/about-eu/facts-figures/economy/index_en.htm

minimum requirements that products marketed in the EU must meet. Products that fail to meet these requirements are not allowed on the EU market. Non-legal requirements offer buyers and producers various options in the form of standards and may have varying preferred status across countries. Non-legal requirements go beyond legislation, as companies (buyers) can go further in their requirements than legislation. The main categories of additional requirements are environmental requirements and social (labour) requirements.

The difference between a standard and a technical regulation therefore lies in the issue of compliance. While conformity with standards is voluntary, technical regulations are by nature mandatory. Handicraft is not a homogenous sector, but consists of a wide range of products, which can be the output of an array of techniques and production processes; either entirely handmade or utilizing some labour saving machinery. Within the Harmonized System of classification, HS codes are assigned to handicraft according to various component materials, the processes by which they are made, or a combination of both. There are no standards and technical regulations which apply specifically to art and craft products; rather there are broad regulations concerning consumer health and safety, for which arts and crafts may need to comply, based on requests from buyers. The study focused on the broad categories of furniture and wood products, home accessories, gifts and jewellery. While the research focused on harmonized mandatory regulations enshrined in legislation and immediately pending future legislation, exporters are advised that additional national legislation and specific buyer requirements for particular marketing channels may also apply.

There is an abundance of EU legislation which could potentially affect arts and crafts products seeking entry to Europe Many producers view these legislative hurdles and technical standards as technical barriers to trade. However, these regulations are imposed equally on EU producers and it is also possible to make the case for the need for these market requirements in order to regulate the protection of consumers and the environment from potential dangers. At the very least, where Barbadian producers are interested in positioning themselves to take advantage of the potential market opportunities, they will have to familiarize themselves with these market requirements in order to engage European buyers in dialogue. The significant responsibilities which buyers hold under European law and the high levels of accountability to which they are held are an important feature of the market requirements. This means that engaging buyers in dialogue (in the product design and development phase where possible) provides the basis for successful market entry and future collaboration. The EU business environment is very dynamic and responsive to both the high levels of advocacy and lobby on the part of its producers and also the general welfare of its citizens. Legislative changes are ongoing. Exporters are therefore advised to remain in close communication with potential buyers on all issues pertaining to prospective market entry.

This export guide and action plan begins with this introduction and background to the plan's context, including definitions and an overview of the value chain for craft export development. This is followed

by a situational analysis of the crafts sector in Barbados. An overview of the EU market for craft and artisanal products is followed by a brief summary of the opportunities arising from the EPA agreement. A review of the EU 27 trade balance in selected art and craft items by product, high potential product segments in the EU, critical success factors in developing export industries in art and craft products and a SWOT analysis based on consultation with local stakeholders precedes the outline export development strategy and action plan.

The export guide and action plan is not intended as a substitute for legal or marketing advice and no liability will be assumed by the BPSA or its authors arising from the use or interpretation of the information contained herein.

Definitions

The International Trade Centre (ITC) defines *artisanal products* (otherwise called *craft, craft products*, craft *items* or *handicrafts)* based on five distinguishing characteristics that broadly apply to a wide range of the world's crafts. These are as follows.

- Crafts are produced by artisans, either completely by hand or with the help of hand-tools and even mechanical means, as long as the direct manual contribution of the artisan remains the most substantial component of the finished product.
- There is no particular restriction in terms of production quantity.
- Even when artisans make quantities of the same design, no two pieces are ever exactly alike.
- They are made from sustainably produced raw materials.
- Their special nature derives from their distinctive features, which can be utilitarian, aesthetic, artistic, creative, culturally attached, decorative, functional, traditional, and religiously and socially symbolic and significant (ITC, n.d).

Artisanal products can be classified under broad divisions based on the materials used, or a combination of the materials and the technique. The six major categories are: basket/wicker/vegetable fibre-works, articles of leather, articles of metal, pottery, textiles and wood.

Situational Analysis: The Craft Sector in Barbados

In December 2008, the Barbados Investment and Development Corporation (BIDC) published a *Profile of the Craft Sector* in Barbados. An updated profile of the craft sector, published online and dated 2010, was not accessible at the time of writing. The 2008 report provides a useful indication of the characteristics of the craft sector in Barbados and the main the issues affecting its growth and development, most of which are increasingly relevant today. The main issues are summarized below.

- ***Structure of Industry and types of activities:*** The Barbadian craft industry has evolved over a period of time from the traditional cottage industry structure of artisans producing practical products for individual domestic use and later souvenir items for the tourist market, to factory based operations producing goods for both the export and local markets. Tourists still remain the principal target market as a captive audience, but there has been some expansion into the domestic market and for

export. Local craft operators have however failed to achieve the level of success in the export arena as they have enjoyed at home.

- ***Estimate of economic value and employment:*** An estimation of the size of the market in terms of economic value is difficult given the shortage of data on sales and the total number of crafts persons operating on the island. If the potential domestic market is measured by the import of craft items, it is estimated that this exceeded Bds $13.6 million mark in 2008 (1 Bds$= approximately US $0.50). This is matched by domestic (Barbados) exports of Bds$0.5 million. The BIDC register of artisans shows an estimate of 112 persons who sell their products commercially and the BIDC quarterly employment survey estimates that in 2008, approximately two times the number of females as males gained employment through the handicraft industry (BIDC, 2008).
- ***Handicraft production*** in Barbados includes basket/wicker/vegetable fibre-works, leather, metalwork, pottery, textiles and wood, recycling craft (paper); handmade bath and body products (soaps, bath gels); wall decorations, decorative glassware and shell-work; jewellery (made of coconut shell, conch shell, beads and seeds, ceramic and copper metal wire).
- ***The potential for linkages and synergies*** with other sectors (hotel, fashion, furniture) is acknowledged, however many craft persons have been unable to realize significant benefits beyond limited production and retailing through craft fairs, and the Pelican Craft Centre. The Pelican Craft Centre is a subsidized industrial space and retail park operated by the government through the BIDC, in close proximity to the cruise shipping pier. It evolved in response to the idea that many consumers of craft welcome the opportunity to see the artisan at work.
- ***More intensive research and development and technology investment*** is needed to capitalize on global trends featuring design, innovation and ecological sustainability.
- ***Constraints to growth and expansion*** include the lack of available financing, design skills, and access to inexpensive raw materials.
- ***Impact of the tourist segment*** is volatile and subject to changes in the economic conditions in countries like the USA and UK. Statistics show that in 2008 approximately 568,873 long stay tourists and 646,147 cruise ship passengers visited Barbados. A 2006 report on the Economic Impact of Cruise Tourism in the Caribbean found that average spending per passenger on local crafts and souvenirs was approximately US$13.32. The impact of this spending in Barbados could therefore amount to some Bds$31,941,812 million in annual tourist expenditure in the craft sector (BIDC, 2008). Despite limited data available, it is clear that whilst there has been a significant increase in the number of tourists visiting the island these gains are not mirrored in an expansion of the craft sector. Producers still cite disappointing sales and market erosion from imported goods as major issues impacting the performance of the sector.
- ***Other issues:*** The sector is also affected by the inability of operators to successfully integrate appropriate craft products, with their Barbadian uniqueness, into the growing tourism sector. In addition many of them are unable to adequately promote their craft as a branded product. The market for craft everywhere is known to be largely shaped by price and quality. There is

significant competition from cheaper imports from the USA, Columbia, India and China due to the highly price sensitive market.

Barbados Exports of Artisanal Products

Table 1 below shows a list of selected artisanal products exported by Barbados and Table 2 shows the main destinations for exports from Barbados. The main product exports are ceramic/ pottery items, glass, jewellery and paintings/visual art pieces. The data shows that although the capacity and capability to export is present, the export value of artisanal products is very inconsistent. Over the period under review, very small and sporadic shipments were recorded by Customs in the importing markets of Belgium, Germany, Ireland, France, the Netherlands and Netherland Antilles, Switzerland.

TABLE 1: LIST OF SELECTED PRODUCTS EXPORTED BY BARBADOS

Code	Product label	EXPORTED VALUE (US$000's)				
		2007	2008	2009	2010	2011
'442010	Statuettes and other ornaments of wood	1	31	24	5	23
'442090	Wood marquetry and inlaid wood; caskets and cases for jewellery etc	2	6	9	3	1
'581099	Embroidery of other textile materials, in the piece, in strips/ motifs, not elsewhere stated	0	0	0	6	1
'5901	Textile fabric coated with gum	0	1	2	4	25
'5907	Textile fabric impregnated ; painted canvas	8	5	9	1	9
'6104	Women's suits, dresses, skirt etc &short, knit/crochet	1	46	74	51	242
'6117	Clothing accessories not elsewhere stated, knitted/crochet	2	7	22	3	12
'6908	Glazed ceramic flagstones & paving, hearth/wall tiles; mosaic cube	8	138	21	11	25
'6911	Tableware, kitchenware, of porcelain/china	5	40	89	37	15
'6912	Ceramic tableware, kitchenware, other than porcelain/china	42	134	152	70	32
'6913	Statuettes and other ornamental ceramic articles	31	141	147	50	21
'7013	Glassware used for table, kitchen, toilet office, etc	10	299	449	124	73
'701810	Glass beads, imitation pearls, imitation precious/semi-precious stones etc	0	3	7	5	0
'711311	Articles of jewellery & parts thereof of silver with/not plated/clad without precious metal	24	943	631	874	682
'711711	Imitation jewellery cuff-links & stud of base metal with/not plated with precious metal	0	5	24	4	4
'711719	Imitation jewellery not elsewhere stated of base metal whether or not plated with precious metal	2	81	66	68	61
'711790	Imitation jewellery not elsewhere stated	1	364	237	96	123
'970110	Paintings, drawings & pastels executed by hand	142	304	89	90	171

'970190	Collages and similar decorative plaques	70	70	9	1	1
Sources : ITC TradeMaps calculations based on UN COMTRADE statistics.						

TABLE 2: LIST OF IMPORTING MARKETS FOR SELECTED PRODUCTS EXPORTED BY BARBADOS		
Code	**Product label**	**Country**
'442010	Statuettes and other ornaments of wood	United States (US), Canada, Netherland Antilles, Cuba, Trinidad & Tobago
'442090	Wood marquetry and inlaid wood; caskets and cases for jewellery etc	Dominica, South Africa, Switzerland, Trinidad & Tobago, US
'581099	Embroidery of other textile materials, in the piece, in strips/ motifs, not elsewhere stated	US
'5901	Textile fabric coated with gum	United Kingdom (UK), Dominica, St. Vincent & the Grenadines, Saint Lucia
'5907	Textile fabric impregnated ; painted canvas	St. Vincent & the Grenadines, Dominica, St. Lucia
'6104	Women's suits, dresses, skirt etc &short, knit/crochet	US, Panama, Germany, St. Lucia, UK
'6117	Clothing accessories not elsewhere stated, knitted/crochet	UK, US, Jamaica
'6908	Glazed ceramic flagstones & paving, hearth/wall tiles; mosaic cube	St. Vincent & the Grenadines, Dominica, St. Lucia, US
'6911	Tableware, kitchenware, of porcelain/china	US, the Netherlands, Antigua & Barbuda, Germany, St. Lucia, UK
'6912	Ceramic tableware, kitchenware, other than porcelain/china	UK, US, British Virgin Islands(BVI) , Canada, Antigua & Barbuda, Grenada, Guyana, St. Lucia, Trinidad & Tobago, Turks & Caicos
'6913	Statuettes and other ornamental ceramic articles	US, UK, British Virgin Islands, ship stores and bunkers, US minor outlying islands, Canada, St. Vincent & the Grenadines
'7013	Glassware used for table, kitchen, toilet office, etc	US, Antigua & Barbuda, St. Kitts & Nevis, BVI, Bahamas, St. Lucia, Trinidad & Tobago, Bermuda, Canada, Grenada, St. Vincent & the Grenadines, UK
'701810	Glass beads, imitation pearls, imitation precious/semi-precious stones etc	US
'711311	Articles of jewellery & parts thereof of silver with/not plated/clad without precious metal	US, Turks & Caicos, St. Lucia, Aruba, UK, Netherland Antilles, Bahamas, Canada, Germany, St. Vincent & the Grenadines
'711711	Imitation jewellery cuff-links & stud of base metal with/not plated with precious metal	US
'711719	Imitation jewellery not elsewhere stated of base metal whether or not plated with precious metal	US, St. Lucia, BVI, Netherland Antilles, Canada, Grenada, UK
'711790	Imitation jewellery not elsewhere stated	US, South Africa, Bahamas, Grenada, Jamaica, St. Lucia
'970110	Paintings, drawings & pastels executed by hand	Trinidad & Tobago, US, UK, Haiti, Canada, France, Grenada

'970190	Collages and similar decorative plaques	United States, Belgium, Canada, Germany, St. Vincent & the Grenadines, UK, Ireland

Sources : ITC TradeMaps calculations based on UN COMTRADE statistics.

Overview of the European market for Crafts and Artisanal Products

The European market for crafts and/or artisanal products is difficult to quantify based on the large number of product and material varieties inherent in the production of crafts. In commercial terms, the main markets for craft products are normally quantified under the label of giftware and home accessories. Handicrafts are widely purchased as gift items and the highest exchange of gifts takes place during Christmas and New Year. Exchanges of gifts are among family members, friends and colleagues. The recent IFH Giftware Report, focused on the 2011 Tendence Show held in Germany and prepared by Koln Retail Consultants proposes that despite the recessionary economic environment, the market for giftware, which is extremely heterogeneous, is expanding and can boast a total volume of € 10.4 billion. The main segment of this market is held by home and table accessories, accounting for a 33 percent share. Not every gift purchased is also given as a present. In 2011, giftware worth up to € 6.2 billion was purchased for presents, i.e., around 60 percent of the total market. The remaining 40 percent were purchased for the buyers' own use (IFH Retail Consultants, n.d.).

The report also suggests that for international entrepreneurs, Europe is potentially one of the most profitable markets in the world. At the same time it also a very complex, competitive and dynamic market. Its structures are changing constantly and buyer motives today are different than they were five years ago. Exporters are constantly facing new regulations and market standards, especially with regard to safety, quality, packaging and the environment. Exporters eager to access the EU market must prepare themselves carefully and thoroughly. As more imported products flood the market, consumers have become smarter in buying and seeking for product originality with quality, stimulated mainly by consumers' thirst for a change and the availability of a wide range of products in the shops

Despite this, the time could be ripe for exporters. Rising production costs are forcing many European companies to purchase outside the EU and imports have shown major growth in recent years. The increasing numbers of EU consumers who have travelled abroad, either on vacation or on official duties has also contributed to the increasing demand for foreign handicrafts. Typically, EU consumers within the crowded marketplace are always searching for new, innovative and functional things as well as variety and excitement in their lives. In particular, with the change in seasons and festivals, where the mood is for celebration, there is opportunity to penetrate this market. However, product offerings must have their own originality, authenticity with unusual taste or design which is trendy, functional and innovative.

The French Market

It is estimated that the French market for handicraft and decorative articles is worth about €200 million (Exporthelp to Europe for Home-Decoration & Home-Textiles, 2009). In recent times, the handicraft market has registered a constant increase for fancy jewellery, wooden articles and decorative items mainly due to a wide offering of diverse products with various styles, huge consumers' appetite and the usage of various materials. The market is based upon two primary clientele; tourists and local customers who have different purchasing behaviours. Tourists' preferences are handicrafts with French influence or design which can be given as souvenirs. Local consumers' choose handicraft for their personal consumption and for gifts. One of the main market characteristics is the wide ranging offerings, from the lower range to the top-of-the-range, especially for creative items. The prices of handicraft are usually based on their originality, design and materials used.

The German Market

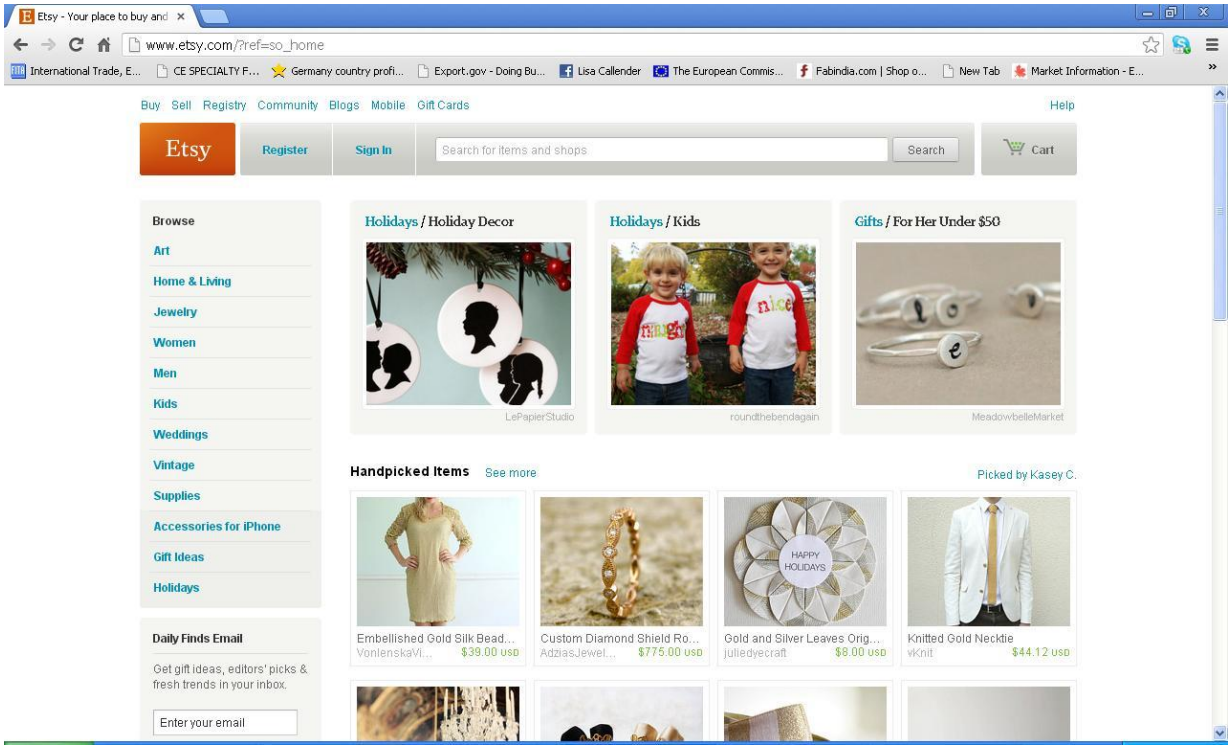
In 2001, consulting firm GmbH propose that with over 82 million inhabitants, Germany was the largest market for giftware and handicrafts items in Europe. This remains the case. As is the case with other EU markets, Germany is supplied with giftware and handicrafts from within Germany as well as the surrounding European countries such as France, Italy, Switzerland and the United Kingdom and from all other parts of the world: Russia, Latin America, Africa and Asia. The size of the total German giftware and handicrafts market varies according to the definition of giftware and handicrafts. In 2001, this was estimated at about DM 29.5 billion; corresponding to a broad definition of giftware and handicrafts including home furnishings, art metal ware, table accessories, Christmas decorations, wood ware and furniture, imitation jewellers, artificial flowers/plants, scents/cosmetics, sweets, toys/computer games, books, discs/videos, watches/jewellery, certain apparel/textile items and others (GmbH, 2001).

More recently, Spiegel Online International proposed that handicrafts are flourishing in Germany's urban centers as part of a backlash, where consumers are increasingly turning away from mass-produced products. Berlin has a long tradition of small shops featuring handmade and vintage goods, partly due to its comparatively low rents. But in recent years, crafts have gained a new lease of life, with knitting clubs opening and stylish sewing shops sprouting up alongside hip cafes. This has been accompanied by an expanding online retailing trend, which have benefitted online marketplaces for handmade items such as *Etsy*. Rob Kalin, a painter, carpenter and photographer who wanted a suitable virtual outlet for his creations, founded *Etsy* in the United States in 2005. Since then, there has been a proliferation of similar sites. The backlash against mass-produced products has proven to be a goldmine for *Etsy*, which posted revenues of $500 million (€380 million) in 2011. In a bid to replicate its success in the US, the company opened the doors of a new European headquarters in Berlin's fashionable Kreuzberg district in 2011. The company says its European sales are already growing (Smee, 2012).

The substantial supply of giftware and handicrafts has transformed the German giftware and handicrafts market into a fiercely price-competitive market place. Nevertheless, innovative and new –to- market

giftware and handicrafts items place still have good market prospects. Consumers demand a consistent supply of new products and marketers must bring them to the marketplace in order to stay competitive. In certain contexts, German consumers may be willing to pay higher prices for exclusive items; however in general, they are very price conscious and want value for money. The market is also influenced by seasonality, peaking just before and around festive occasions such as Christmas.

Figure 1 (below): Etsy Europe Online Portal



The Dutch Market

The Netherlands is well known for its galleries, fleas markets and wholesale centres for handicraft. Trend forecaster Lidewij Edelkoort suggests that the current economic situation has led to a changing relationship between designer, producer and consumer. Reviewing the high-end exhibition 'Objects for sale', where the works of several Dutch designers were created with three price categories in mind (less than 50 euros, 50 to 500 euros or more than 500 euros) she highlights the increased focus post-recession on the value of things and of all parties on the value design has in creating this enhanced value (Edelkoort, 2012). In general, the value of an object, which in turn defines the pricing, is a function of:

- transformation of function and value related to the material
- reshaping and repurposing of everyday objects to create entirely different items using a small intervention (in other words the cerebral quality of a design)
- the amount of labor put into a product and
- different finishing techniques and attention to detail applied by the maker
- quality and authenticity of the item.

Fair Trade

According to the World Fair Trade Organization, Fair Trade is a trading partnership, based on dialogue, transparency and respect, which seeks greater equity in international trade. It contributes to sustainable

development by offering better trading conditions to, and securing the rights of, marginalized producers and workers; especially in the South. Fair Trade has become a concept that is Europe wide recognized and acknowledged by consumers; for example in the Netherlands, the name recognition of "*Worldshop*" fair trade brand is 85%. The fast growth of Fair Trade in the UK and Italy show an appreciation of consumers for Fair Trade products. The majority of revenue generated by Fair Trade sales in Europe is attributed to food sales, which encompasses Fair Trade shops, supermarkets and other outlets. Less than 10% of the figure is attributed to handicrafts, whose main outlets are the nearly 3000 Fair Trade shops that exist in Europe. The sale of Fair Trade labelled food is growing fast. However, the sale of Fair Trade handicrafts is growing very slowly, even though most of the WFTO members are handicraft producers. A study by EFTA showed a gift market in Europe of around 6 billion Euros and currently Fair Trade is only taking a drop of this (WFTO Europe, n.d.). Despite the outlook for slow growth, Barbadian producers seeking to carve our distinctive market niches for their products and access marketing opportunities should examine the prospects of fair trade as an option for market entry.

Branding

The EU consumer is typically very aware of brands and the core values that branding conveys. It is important for producers seeking to enter the market to consider making the necessary investments in building brands with a consistent promise of benefits to purchasers. Beyond the opportunities for direct sales of products, there is also the possibility for licensing arrangements to emerge based on novel ideas converted to intellectual property. It has also been observed that over the years, EU based luxury brand companies have expanded their range of products to include handicraft or gift items. This can be seen especially in the fancy jewellery and textile sectors such as Christian Dior, Channel, Louis Vuitton and Yves St Laurent.

Market Segmentation

In general, the market for artisanal products can be categorized within three segments; **luxury**, the **middle to up market** segment and the **low** market segment (Euromonitor, 2012). The market is experiencing increasing polarization, that is, the low –end and luxury segments are growing while the middle market is stagnating. The lower market segment is mainly flooded with cheap imports from low cost producing countries. These cheaper products tend to drive down average retail prices, leading to consumer expectations of better quality at a lower price. The middle to up market segment is supplied by local talented producers and producers in neighbouring European countries. In such a competitive scenario, exporters should focus on and aim to penetrate the middle to up market segment and avoid the low market segment where prices are very low. The luxury market segment covers all product categories and offers excellent opportunities, current and future, for handmade products; particular in the areas of affordable or soft luxury. New luxury market research from Euromonitor International indicates that despite the global volatile economic outlook, the luxury goods market continues to prove resilient. In 2012, the global luxury market is set to grow by more than seven percent and exceed US$ 302 billion. Valued at an estimated US$77 billion in 2012, the United States market for luxury goods is by far the largest globally, 2.4 times higher in value than the second-ranked luxury market Japan, with an

estimated 2012 value of US$32 billion. The four biggest markets of the United States, Japan, Italy and France collectively account for almost half of total luxury goods sales in value terms in 2012. BRIC [2]markets account for 11 percent of global luxury sales in 2012 by value, and by 2017, Euromonitor International expects their share to grow to 16 percent (Euromonitor, 2012). However, participation in the luxury segment requires precise streamlining of product designs according to the taste of consumers, adherence to market and product trends, consistent quality and service policies and development, promotion and management of branding and other forms of intellectual property.

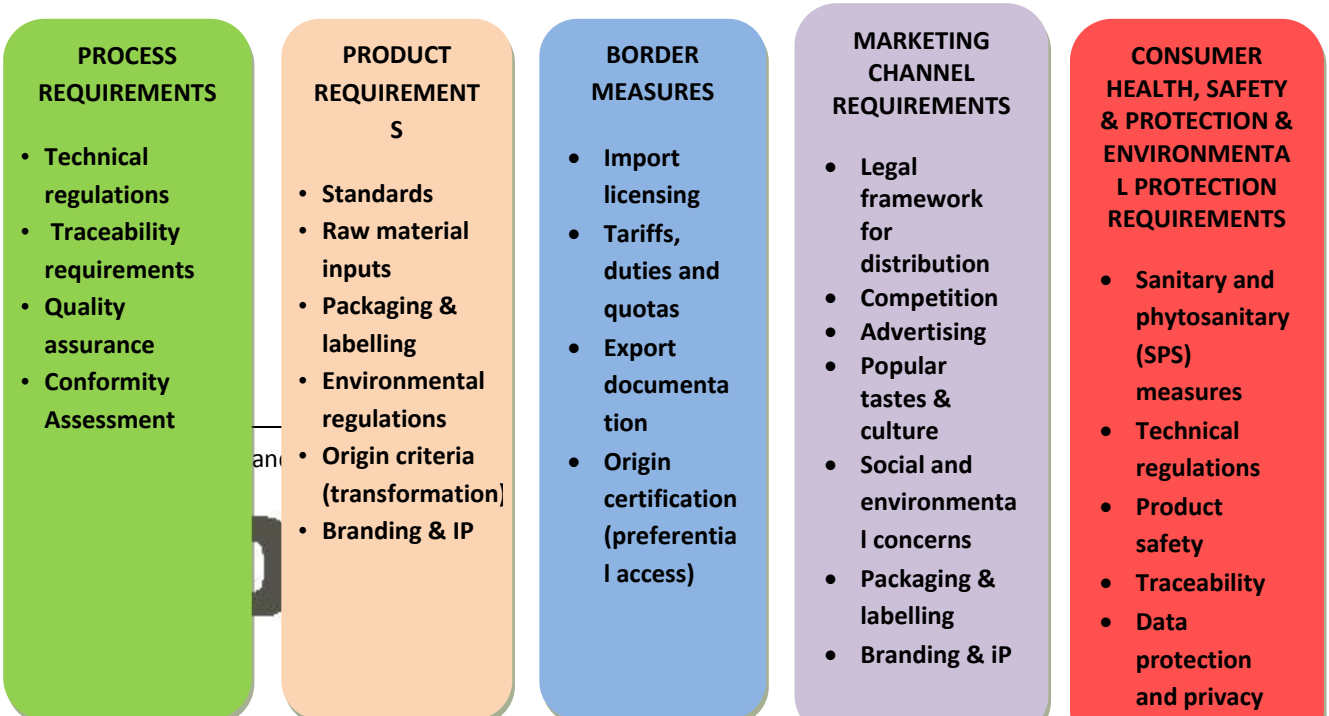
Understanding Market Requirements

Market access and penetration for the exporter is conditional on meeting general and specific market requirements. Market requirements may vary widely between countries. They may take the form of:

- **Process requirements**: for example; scientifically based technical regulations in relation to specific hazards, use of batch coding and other systems which impact traceability
- **Product requirements:** including standards and mandatory legislation affecting packaging and labelling
- **Border measures:** including mandatory licensing procedures and or requirements for import permits
- **Marketing channel requirements**: for example, the expectation of usage by producers of barcodes and other specific inventory and/or product management systems in certain marketing channels, specific quality requirements which may be required access specific marketing channels (i.e. wholesale, retail, hotel supply, restaurant supply, etc.)
- **Consumer Health, Safety and Protection requirements:** for example, sanitary and phytosanitary measures and data protection and privacy measures.

Figure 2 below illustrates further examples. Because each of the market requirements can act as a barrier to accessing and penetrating a new market, a successful exporter begins the process of investigating market potential with research to identify the requirements for trading legally within the market.

Figure 2: Market requirements to be considered by exporters seeking market access and penetration



Summary of main EPA opportunities

The CARIFORUM EPA in Brief

At the end of 2007, the first comprehensive Economic Partnership Agreement (EPA) was agreed through various rounds of discussion, consultation and negotiation between the EU and CARIFORUM (Caribbean Forum of ACP States, comprising CARICOM plus the Dominican Republic). The EPA is a successor, reciprocal trading agreement which replaced the long standing unilateral preferential access to European markets enabled by the Cotonou Agreement with ACP countries. The EPA Agreement was signed in October 2008 and is provisionally applied as from 29 December 2008. In addition to the reciprocal relationship, the EPA modernizes the provisions for trade and development, by the inclusion of provisions aimed at boosting goods trade, as well as trade in services; investment; intellectual property and a wide range of other trade-related areas. Sustainable development and regional integration are major themes running through the agreement, which includes development cooperation provisions. The EPA also establishes new joint oversight bodies for the implementation of the agreement and provides for ongoing monitoring and review. As of the 12 of June 2012, 4 out of 15 CARIFORUM countries and 10 out of 17 EU countries have ratified the agreement, enshrining the provisions in national legislation. The agreement will continue to be provisionally applied until ratification is complete.

New market access for artisanal products

In principle, effective January 1, 2008, the EU has liberalized market access for most artisanal products through the EPA. Duty-free and quota free (DFQF) access is provided for 98% of trade in goods and 94% of trade in services immediately, as of the effective date of January 1, 2008(CAPRI, 2009).[3]

[3] Source: CAPRI (2009), The Long-term Impact of EPA in the Caribbean: Jamaica and St. Lucia, A Working Paper, retrieved from http://www.slideshare.net/testing123456/economic-partnership-agreement-epa-st-lucia

EU 27 Trade Balance in selected art and craft items by product

Table 3 below shows the EU 27 trade balance in selected artisanal products, categorized by product lines. Where the exported value of product exceeds the imported value, a positive or favorable balance of trade exists and the EU internal market is more self sufficient in production. Conversely, where a negative or unfavorable balance exists, there is a trade deficit or trade gap and better opportunities exist for exporters from outside the EU 27 market. Product groupings where a trade deficit existed in 2011, included:

- Wood marquetry and inlaid wood; caskets and cases or cutlery of wood
- Women's suits, dresses, skirt, knitted or crocheted
- Embroidery in the piece, in strips or in motifs
- Ceramic tableware, kitchenware, other household and toilet articles
- Statuettes and other ornamental ceramic articles
- Articles of silver jewellery
- Imitation (Cosmetic) jewellery
- Paintings, drawings, pastel, collages and similar art executed by hand.

TABLE 3: EU 27 TRADE BALANCE IN SELECTED ARTISANAL PRODUCTS (UNIT : US DOLLAR THOUSAND)

HS Code	Description	Balance in value			Exported value in 2011	Imported value in 2011
		2009	2010	2011		
4420	Wood marquetry & inlaid wood; caskets & cases or cutlery of wood	-291645	-293399	-213517	368124	581641
6104	Women's suits, dresses, skirt, knitted or crocheted	-2385889	-3320444	-3728268	5630078	9358346
5810	Embroidery in the piece, in strips or in motifs	-60861	-61303	-71135	286545	357680
5905	Textile wall coverings	20156	36571	49991	85631	35640
6912	Ceramic tableware, kitchenware, other household & toilet articles not elsewhere stated	-271385	-319630	-270829	777648	1048477
6913	Statuettes and other ornamental ceramic articles	-263762	-292226	-226098	511732	737830
7013	Glassware used for table, kitchen, toilet office, etc	758503	895801	1075092	3948849	2873757
701810	Glass beads, imitation pearls, imitation precious/semi-precious stones etc	203122	199771	192056	362501	170445

711311	Articles of jewellery & parts thereof of silver without precious metal	-212270	-143203	-28048	2164993	2193041
711790	Imitation (Cosmetic) jewellery not elsewhere stated	-398951	-433606	-434812	617060	1051872
9701	Paintings, drawings, pastel, collages & similar art executed by hand	323633	283190	-451263	5173151	5624414

High potential product segments in the EU

Online market research reveals that the following artisanal product categories have the highest potential demand among customers in the EU.

- ***Jewellery:*** silver jewellery or imitation jewellery is sought after as an accessory to personalize clothing and make statements on individuality
- ***Wooden decorative articles with a natural finish***: Consumers prefer natural and organic appearances in wood products which are part of a trend towards 'honest' , authentic, timeless and durable materials consistent with environmental awareness. Wood used in products must be from bamboo or other sustainably harvested sources.
- ***Lampshades***: Lamps are widely used in France instead of ceiling light in living and bedrooms. Lampshades can be made from wood, paper/ fibre based composites, and metal.
- ***Home linens***: are in demand, they should be sold in ready to made pieces according to local standard sizes and be either original contemporary or vintage in their styling
- ***Basketware and wickerware***: are in demand for low cost storage and decorating updates
- ***Functional pottery*** for plants and table decoration
- ***Decorative candles*** are particularly popular in Germany and Scandinavia
- ***Vegetal fibers*** used in decorations and flooring/carpet are popular in France.

Critical success factors in developing export industries in art and artisanal craft products

In developing export industries in art and artisanal craft products for the EU market, the research shows that there are several basic requirements to enable producers to enter the value chain. Basic optimal conditions include:

- Consistent product quality compliant with any EU product standards that may apply to that category of items and appropriate branding
- Distinctive product designs which reflect market tastes, innovative ideas and streamlined production processes and finishing
- Competitive pricing and delivery times
- Appropriate packaging, conforming to the requirements of the Directive on Packaging and Packaging Waste (Directive 94/62/E and amendments), sourced from suppliers compliant with GMP and EU standards
- Detailed product information e.g. raw materials certification, compliant with the relevant technical regulations and sustainable supplies of quality inputs
- ability to meet the labelling requirements and adhere to the relevant product standards and technical regulations
- access to appropriate testing systems to monitor compliance with technical regulations

- ability to target specific niches and develop partnerships with buyers in the target markets based on user needs and contexts.
- understanding market needs and requirements in the context of the buyer-driven supply chain; maintenance of open lines of communication regarding demand preferences in products, quality and packaging requirements and fostering buyer involvement at all stages of the chain
- recognition of the influence of seasonality on the purchasing patterns within the market
- understanding the role of workforce training and development to meet the needs of a more highly developed and competitive value chain
- understanding the role of research and development, innovation and technology as driving forces in new product development
- need for sector-specific collaboration among SMEs in the areas of advocacy, lobby, trade promotion, brand development and integration with global supply chains.

Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

Table 4 below highlights the key points of a SWOT analysis of the Barbadian craft sector, undertaken through focus group consultations with leading companies in the Barbadian craft sector.

TABLE 4: SWOT ANALYSIS: BARBADIAN CRAFT SECTOR		
INTERNAL TO THE SECTOR	**STRENGTHS**	**WEAKNESSES**
	• Good functional designs and design capability in firms • Good production culture, capacity to product quantity and quality (craft factories) • Many firms have control of the production process (no outsourcing)- flexibility in production runs and for training of employees • Use of indigenous raw materials and expertise to innovate based on experienced producers • Strong national brands and individual company brands representing distinctive products • On island e-commerce service providers experienced in e-commerce development	• In-market commercial expertise on the EU side for marketing and promotion, navigation of technical regulations and standards • Intellectual property protection and management • Working examples of meaningful collaboration across the value chain • Critical mass of competent artisanal skills to enable expansion of business/ lack of apprenticeship orientation and opportunities, adequacy of advanced production skills • Financing within small enterprises to sustain long term employment • Sustainable jobs and employment opportunities in the craft • Absence of incentives to support training and employment • Visibility and promotion of craft sector and individual artisans on a national and international level
EXTERNAL	**OPPORTUNITIES**	**THREATS**
	• E-Commerce development and online retailing • IP registration and commercialization, including licensing • More sophisticated branding and promotion • Better linkages with tourism, e.g through craft tours	• Buy-in by local banks to e-commerce • Instability of local and export markets • Inability to find sustainable markets and gain a foothold in local market share • Competition from imports • Changes and unfavourable conditions in the EU business environment (e.g. carbon taxes and environmental levies • Lack of recognition of the Barbadian artisan

The Crafts Value Chain

Figure 3 below shows the elements of the crafts value chain leading to the development of export markets. Producers need to address each component of the value chain within their operations or through outsourcing; in a manner consistent with the specific requirements of each export market being targeted.

Figure 3 (below): The Crafts Value Chain

Prototype design and development

Producers should not underestimate the need to adapt designs and product ranges to the tastes and cultural preferences of a particular group of consumers or a customer profile within a target market. Process adaptations may also be required, for example to produce multiples at a lower cost or produce specific colour ranges or incorporate buyer feedback.

- CBI Guide to Product and Range Development: http://www.cbi.eu/marketintel/Your%20guide%20to%20product%20and%20range%20development/163030

- CBI Guide to Product and Range Development Workbook: http://www.cbi.eu/marketintel/Workbook%20-%20Your%20guide%20to%20product%20and%20range%20development/163029

Securing Inputs

Inputs are elements needed for production. Each component part of the craft product and all aspects of the making process must comply with EU product safety legislation. Special attention must be paid to product finishes and treatments, e.g. dyes in textiles, glazes in ceramics and finishes used in wood products. These must be checked at the time of sourcing to ensure compliance with technical regulations.

- Home Decoration; Market Access Requirements Guide: http://www.cbi.eu/marketintel_platform/Home-Decoration/136093/mar
- EU Legislation: http://www.cbi.eu/marketintel/search?product=1870

Export Production Quality Control and Packaging

EU buyers expect consistent quality and a measure of uniformity from producers offering products. Handmade products which are one of a kind should be marketed as such and labelled accordingly to meet the expectations of buyers and consumers. It is imperative that all packaging is sourced from suppliers compliant with Good Manufacturing Practice (GMP) and EU technical regulations, as well as any standards imposed by buyers or retailers. The packaging which is sourced must adhere to all harmonized packaging and labelling regulations. Additional national regulations may also apply and these should be identified through dialogue with buyer.

- Product labelling and packaging http://europa.eu/legislation_summaries/consumers/product_labelling_and_packaging/index_en.htm

Assessing Export Readiness

Market promotion should only be undertaken when the exporter has assessed export readiness and the potential viability of export to a specific target country within a specific market segment (i.e. wholesale, retail, food service and catering, e-commerce, etc.). The following resources may be useful for exporters in assessing their export readiness.

- CBI Export Marketing Planner (2009): http://www.cbi.eu/marketintel/Export-Marketing-Planner-A-manual-on-how-to-enter-European-markets/158976
- SIPPO Export Manual, Exporting to Europe: An Introduction: http://www.slideshare.net/olgan/exporting-to-europe-an-introduction-sippo-cbi

Targeting Buyers through Promotion

Trade Fairs are the most common methods of targeting buyers. They are also good events for networking and building contact with suppliers of inputs, packaging and machinery as well as service providers. Some prominent trade fairs in the EU are listed below.

- ***The Birmingham International Spring Fair*** (http://www.springfair.com) to be held next in February 2013 in the UK is Europe's largest gift & home accessories show featuring more than 3,000 UK-based and international home and gift suppliers, with an estimated 300,000 design-led new product launches across the show. It is also a show for watching the trends and comparing products from thousands of suppliers.
- ***Tendence*** (http://tendence.messefrankfurt.com), the international consumer goods trade fair held in the second half of the year around the end of August in Frankfurt, Germany, is focused on the mid to high-end segments of the home and gift sectors; in particular the lucrative Christmas season. The trade show attracts around 2,000 exhibitors from all over the world who offer from small and medium volumes through to the container trade. In 2012, Tendence was the meeting place for around 46,000 trade buyers and retailers from 91 countries who made their way to Frankfurt Fair and Exhibition Centre during the five days of the fair. There, they gathered information about the range of products offered by the 1,852 exhibitors from 46 countries, placed orders, attended the special presentations and made active use of the programme tailored to the needs of the retail trade.
- ***Maison et Objet*** (http://www.maison-objet.com) is a major French trade fair held in Paris for interior design that has gained a reputation as a showcase for cutting-edge innovation and trends in product design. Held biannually (January and September), it has been described by design critics as among the 3 most important European events for interior design with a huge collection of innovation and talent in one place. It is accessible strictly by professionals involved in the design trade.

Logistics and Distribution

It is important that exporters understand the framework for distribution and the attendant costs which will apply to transportation through roads, ports and airports. Laparkan Shippers in Barbados, during an interview in October 2012, advised that from Barbados, shipments are occasionally sent to the EU by air or freight. Air cargo is done via British Airways and Virgin Airlines. As such, there are no direct air routes to the continent and cargo must pass through the UK before being transferred on to the EU. Ocean freight is less expensive than air freight and is the preferred medium for movement of less than a container load of products, since it offers the possibilities of consolidation with other producers which is a more economical option. Transfer to the EU is also done through the UK where Laparkan maintains an agent who makes contact with EU freight forwarders to arrange cargo transfer to the EU. The company is also connected with a range of agents in the EU through its membership in the World Customs Agents (WCA) Association. Shipments are demand based and in general vessels leave every two weeks, however with full container loads, these can be shipped weekly. Air freight rates are based on weight or dimensions of a particular package (whichever is more). In general, rates for ocean shipping can be estimated as follows:

- ***Barrels (Barbados to Portsmouth, UK):*** range between BDS$650.00 (consolidated) to upwards of BDS$1000.00 (consolidated)

- ***Containers (Barbados to Portsmouth, UK):*** upwards of US$1800.00 (approximately).

On the EU side, intra-EU transportation is mostly handled by truck or rail through freight forwarders. Air transportation is more expensive and given the extensive rail and road network, this is much less frequently used. There is an association of freight forwarders in every country and very often, there may be relationships between distributors in the market and particular forwarders. Handling charges are approximately 0.6% of the shipment value for the first 30 days and 0.15% of the value for an additional 30 day period.

Objectives of the Strategic Export Development Initiative to the EU

The general objective of the strategic export development initiative is to assist producers in tapping into potential market opportunities arising from the EPA. The specific objectives are:

- To increase the market penetration of Barbadian craft within the middle to high end and luxury segments of the EU market, and
- To establish a functioning working committee of producers and organizations across the value chain to contribute to long term advocacy and lobby initiatives in entering the EU market and hence the development of EPA monitoring mechanisms.

Rationale

There is a significant differential, often underestimated, in the products purchased as souvenirs by tourists while on vacation and those consumed by an individual operating in their home market. The dominance of the tourist market in Caribbean countries has often distorted the production of producers towards the captive audience of tourists, and therefore does pose challenges when products have to 'sell themselves' in the competitive retail environment. The sophistication of packaging, branding, functional adaptation and guarantees of adherence to product standards and technical regulations are barriers to the acceptance of Caribbean craft products by mainstream overseas buyers. Because of the associated costs, there is a general lack of in-market expertise. Product development is often undertaken by consultants in the home market without connections to the retail base in the target market, otherwise by short-term foreign consultants with a lack of full understanding of the local culture. The research on the EU market shows that consumers are retreating from mass-produced products, towards those which can deliver unique lifestyle experiences. Within this context, online retailing has shown tremendous growth and is expected to experience continued growth in the future. The pillars of the export development initiative and action plan address these deficiencies through the provision of private sector led working committee tasked with the implementation of a skills bank to preserve and propagate traditional skills, and the management of an initiative to tackle EU market penetration in a focused and consistent manner. Caribbean firms seeking to penetrate the EU market with products can expect to face well organized, established and effective lobby from the multiple sector-specific associations in the EU and there will be a future need to replicate sector-specific advocacy on the local level. With the comparatively small size of the private sector in most of the countries, it is unlikely that multiple associations will be sustained, hence the proposed approach of working committees.

Methodology and Approach to implementation

The key aspect of the proposed initiative which differs from many similar export development initiatives is the underlying objective to establish a small private sector led working committee of artisans under the Barbados Small Business Association, the Barbados Manufacturers Association or the Barbados

Private Sector Association to oversee the project development and implementation. Experience all over the world has shown that where small firms engage in focused collaboration this leads to shared learning and catalyzes innovation. The focused collaboration in this case is an export development initiative to develop cluster members. It is important that clustering encompass all stages in the value chain, for example to include suppliers of inputs (particularly packaging) as well as producers, packaging logistics and transportation providers and representatives of all agencies involved from concept to consumer promotion. During the research consultations, a representative of Laparkan shippers has already expressed interest in working with producers on such a Committee over the long term to derive mutually beneficial commercial expansion. The absence of value chain engagement is a significant failing of many cluster initiatives in the Caribbean. It is widely accepted that inter-firm cooperation can allow firms to retain their autonomy while:

- Developing markets faster at reduced cost and risk, in particular, export markets
- Undertaking joint activities such as market research and product development beyond individual firm capabilities or resources
- Exploring new business opportunities abroad and promote integration into global markets
- Improving profitability by sharing administrative and promotional costs
- Achieving efficiency gains by shared access to technology
- Accumulating knowledge and information
- Saving time and cost using joint transportation and other export facilities
- Moving from 'reactive' to 'active' exporting.

Scope of Activities to be Undertaken

The proposed scope of activities to be undertaken represents another outcome of the consultation discussions. The strategic activities identified reflect immediate priorities to be addressed on the local level, which also offer capacity building possibilities for BPSA as an organization.

1. Strategic Activity 1: Establishment of a working committee

As an outcome of the focus group consultations, the firms and individuals in attendance agreed to pursue the formation a working committee. The merits of the committee have been discussed previously. A decision should be taken on the local level which organization will incubate the committee. While every attempt should be made to be inclusive in the approach to working with local artisans who are willing, there is no need for the committee to be huge in numbers. As the development of the initiative progresses, various components of the value chain can be engaged according to the priority needs.

2. Strategic Activity 2: Engagement of EU-based in-market expertise to guide branding, marketing, product adaptation and building of strategic commercial relationships

The ideal individual should be a Barbadian or of Barbadian heritage and living and working in the EU with extensive commercial expertise. This will provide the advantage of a familiarity with the local cultural norms and build trust and commitment. Perhaps Barbadian diplomatic missions in the EU could

be engaged to assist in recruitment of a suitable candidate and support the monitoring of the project work programme.

3. ***Strategic Activity 3: Development of e-commerce among cluster grouping to support market penetration and online retailing***

Participants in the consultations indicated that they were aware of local e-commerce providers who could support the development of an e-commerce enabled platform. The design and development of the platform should be specifically geared to the special needs of customers in the EU market; for example, it should support multilingual ordering capability in relation to EU languages.

4. ***Strategic Activity 4: Technical Assistance (packaging selection and labelling development)***

Expertise should be engaged to support cluster firms in the selection of their packaging and development of labelling, consistent with the technical regulations outlined in the research reports as well as the individual EU product standards and in consultation with the in-market consultant. Again, the bilingual nature of EU commerce needs to be considered.

5. ***Strategic Activity 5: Cluster attendance at a major EU trade fair***

Attendance at a major trade fair will support cluster members in understanding market standards, observing distribution channel requirements and gaining knowledge to inform sourcing of inputs to comply with EU market standards and technical regulations.

6. ***Strategic Activity 6: Develop local craft tours to promote local linkages with tourism and agriculture and expand brand recognition, while capitalizing on the opportunities of the local market;***
7. ***Strategic Activity 7: Develop a campaign to support the visibility of the craft sector and individual artisans***

A local public relations consultant should be engaged to work with cluster members to package and develop craft tours to meet international tour standards and implement an appropriate media campaign promoting the status of the Barbadian artisan.

8. ***Strategic Activity 8: Design of a standardized craft/ artisanal skills training and apprenticeship program and a local skills bank to support incremental employment and conservation of traditional skills***

This activity, to be undertaken among cluster group members with the support of the implementing organization, should also develop a national lobby for appropriate fiscal incentives and micro-financing to support incremental employment, apprenticeship and skills training in the interest of national development.

Action Plan and Timeframe

It is suggested that a one year pilot programme be developed to initiate the market penetration initiative. Figure 4 below shows possible sequencing of the indicative work plan.

FIGURE 4: INDICATIVE WORK PROGRAMME					
	ACTIVITY	Q1	Q2	Q3	Q4
1	Establishment of a working committee				
2	Engagement of EU-based in-market expertise				

3	Development of e-commerce				
4	Technical Assistance (packaging selection and labelling development)				
5	Cluster attendance at a major EU trade fair				
6	Develop local craft tours				
7	Visibility campaign				
8	Design of a standardized craft/ artisanal skills training and apprenticeship program and a local skills bank				

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