



WESGRO BACKGROUND REPORT

ON THE

CRAFT INDUSTRY IN THE WESTERN CAPE

AUGUST 2000

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1.0 INTRODUCTION

1.1 Definition

“Craft” refers to a means of livelihood through the production of a broad range of useful or decorative items manufactured largely by hand with the emphasis on local materials and traditional skills. By its nature, craft lends itself to production in an informal environment (e.g. the home) making it particularly suitable as a means of income generation for large sectors of the South African population.

1.2 Recent history of the craft sector

South Africa’s history of internal marginalization and international isolation had a specific impact on the craft sector:

- ? There was minimal support for maintaining or developing traditional skills.
- ? There was little support for small business enterprises and even less focus on micro-enterprises. Rural areas - particularly women and the disadvantaged - received little meaningful help or direction.

1.2.1 Important changes

Since 1994, there have been dramatic changes at all levels resulting in significant opportunities for craft producers:

- ? Government is redressing the lack of support for the marginalised, particularly with regard to micro and small business enterprises and recognises the contribution and potential of the craft sector in relation to job creation.
- ? The national Department of Arts, Culture, Science & Technology has selected craft as one of four cultural industries to which it is lending fast-track support for sector growth and development.
- ? The growth of tourism and an appreciation of cultural and heritage tourism is creating exciting opportunities for craft producers. So, too, does South Africa’s entry into world markets. The craft industry has potential as an earner of foreign exchange and careful research and planning is needed to capitalize on this.
- ? Multi-culturalism has been recognised as one of South Africa’s great strengths, which should be encouraged, along with the development of traditional skills and indigenous knowledge systems.

1.3 Craft categories

Craft activity can be classified across a number of different categories and it is important to recognise these in order to develop a thorough understanding of the industry:

- ? **Traditional** - culturally specific products the meaning and significance of which is generated and shared by members of a specific community e.g. clay beer pots (KwaZulu-Natal).
- ? **Designer goods** - a deliberate adaptation of traditional design motifs and production processes to create a more commercially viable item.
- ? **Craftart** - products which are created entirely by hand by very skilled producers. Items are of high aesthetic value and design is an important component. Production materials and processes may be specialised and pieces are produced either as "one-offs" or in very low volumes in studios or collective workshops. These products generally have a significant value-added component and are available at the top end of the market.
- ? **Functional wares** - mass-produced handmade goods, often of superior design and production quality, created in small batch production processes in craft workshops or (small) factories.
- ? **Souvenirs** - generally inexpensive trinkets of simplified crafts, which sell as memories of a particular location or experience.

1.3.1 Product sub-sectors

Product types are usually determined by available raw materials and opportunities for skills transfer. Design can be heavily influenced by the traditions of the dominant cultural groupings - particularly in the rural areas - and it is possible to trace regional "handwriting" in terms of design and production techniques. Major product sub-sectors across the country would include ceramics, textiles (a wide variety of fibre treatments), beadwork, jewellery, designer apparel, metalwork, woodwork, items from recycled materials, grasswork, indigenous and exotic plant/flower products.

1.4 Demographics of craft activity

According to the 1997 census, some 1,2 million people are currently employed in craft - or craft related - activities, while some economists estimate that the sector contributes in the region of R3,5 billion to the economy annually.

Broadly speaking, craft activity in South Africa can be divided into two main areas: production and retail. Levels of activity vary from region to region and are influenced by a number of factors included amongst which would be:

- ? the prevalence of traditional craft practices,
- ? access to training,
- ? access to raw materials,
- ? levels of infrastructure,
- ? access to markets,
- ? existing linkages with the regional and national tourism industries.

1.4.1 Craft production

Craft production is particularly high in those regions where it is still intrinsic to a way of life and items produced are largely *traditional* in design and function (everyday domestic use or as tools of ritual practice). This is especially true of Kwazulu-Natal, Mpumalanga, Northern Province and Eastern Cape where predominantly rural communities continue to produce craft according to traditional practice.

Although craft production activity is also high in regions such as Gauteng and the Western Cape, significant levels of urbanisation and often complex cultural influences have resulted in a trend away from *traditional* styles towards the production of *designer* and *functional* wares. This trend is evident, also, in centres such as Durban or Port Elizabeth despite the fact that they are situated in regions with dominant, culturally specific, traditions of craft production.

1.4.1.1 Craft Production (Western Cape)

The highest levels of craft production in the Western Cape occur in the Cape Metropolitan Area, which is both the economic hub and the most densely populated region in the province. However, there are further significant nodes elsewhere in the province, particularly in those areas where there is an established or growing tourism industry e.g. Winelands, Garden Route or the Overberg Coastal Belt (Hermanus, Kleinmond etc.)

1.4.2 Craft retail

Craft retail activity is strongest in and around tourism nodal points (scenic points, game parks, and cultural attractions) and this aspect of the industry is particularly vibrant in Durban and Cape Town¹. Gauteng is also an important

¹ Cape Town, in particular, is viewed as *the* primary retail opportunity for craft producers throughout the S.A.D.C. region

retail centre by virtue of its status as both the economic heartland and the largest metropolitan area in the country.

1.5 Structure of the industry

Overlooked by government and mainstream visual arts administrators alike, the craft industry was for many years fragmented with little in the way of a national communication network or programmes for industry development and support. Organisational initiatives tended to be largely amateur, regionally based or limited to a specific medium (e.g. weaving or ceramics). Some of these initiatives have proved highly effective over the years, such as the Association of Potters of South Africa (national) and the many regional and local guilds.

More recently, a National Crafts Council of South Africa has been established. With a head office in Gauteng and representatives in each province, the Crafts Council has made substantial progress in building a national network and is working increasingly closely with government in the formulation of policy and implementation of certain sector support programmes.

Valued equally for the income generating opportunities it presents and the legacy of cultural practice it incorporates, the craft sector has been actively promoted by national government since 1994. Although there are obvious links with tourism and social welfare, broad responsibility for sector development falls to the Department of Arts, Culture, Science & Technology (design, product development and training) and the Department of Trade and Industry (small business support and export market development). Primarily responsible for policy making and legislation, D.A.C.S.T and the D.T.I do not generally run programmes themselves, but work through government agencies such as the National Arts Council or the relevant division within the Council for Scientific Information and Research (C.S.I.R). (See 3.4.1 for further information).

1.6 Product sub-sectors (Western Cape)

Major product sub-sectors in the province would include:

1.6.1 Ceramics

The quality and diversity of ceramics in the Western Cape is high and important work continues to be pioneered by the surprisingly large number of *craftart* ceramists operating in both urban and rural areas. As with the rest of the

country, there is a growing trend towards small to medium studios creating more commercial, limited production runs of items for sale mostly in interior design or lifestyle retail outlets.

<i>Principle categories:</i>	Craftart, designer and functional ware.
<i>Training opportunities:</i>	In-studio training, community arts colleges, technical colleges and technikons.
<i>Marketing outlets:</i>	Galleries, interior design stores, craft markets, certain tourism outlets, in-studio galleries.
<i>Key organisational structures:</i>	Association of Potters of South Africa.

1.6.2 Textiles

This sector incorporates a wide variety of different fibre treatments for use in clothing, homeware and interior design objects e.g. spinning, weaving, dyeing, printing, appliqué, quilting, embroidery, knitting, crochet and more.

It is important to note that although some exciting contemporary work is being produced by small groups and SMMEs in the sub-sector, South Africa does not have a tradition of distinctive, highly recognisable locally produced woven or printed textiles, unlike countries such as Ghana or Mali.

Previous to the establishment of the clothing and textile industries in the country, fabrics for use in interior design or clothing manufacture tended to be imported and many designs employed in factories today continue to be copied from overseas².

From the advent of colonialism, imported cloth was used also in the manufacture of traditional clothing. However, cultural design value was often added (especially by groups such as the Xhosa people, Eastern Cape) through beading and appliqué work, together with the use of buttons and safety pins in complex patterns. Most of these elements have since become part of a cultural design vocabulary and can be seen even in contemporary versions of Xhosa traditional dress in the Western Cape today.

In an important development, there has been some experimentation recently with the use of certain design elements from traditional Xhosa dress in the creation of sophisticated ranges of soft furnishings for the interior design market.

² Some commentators suggest that this lack of investment in the development of a uniquely indigenous design niche is one of the reasons why many of the larger local textile producers and clothing manufactures are finding it increasingly difficult to compete internationally.

Led in separate initiatives by Textek (C.S.I.R.) and a handful of small local manufacturers, these projects contribute not only to the development of a uniquely South African style, but may also create entry points for craftspeople from disadvantaged communities into the formal market place if at least part of the manufacturing of these items can be done by community based production groups.

<i>Principle categories:</i>	Craftart, designer and functional ware, traditional (costume).
<i>Training opportunities:</i>	Certain job-creation NGOs, in-studio training, community arts colleges, technical colleges and technikons.
<i>Marketing outlets:</i>	Galleries, craft markets, interior design stores, certain tourism outlets, in-studio galleries.
<i>Organisational structures:</i>	Weavers Guild, Quilters Guild, Embroiders Guild, Lacemakers Guild etc., CLOTEX, Clofed, Clothing Industry Training Board.

1.6.3 Designer Apparel/Traditional dress

The linkages between the designer - or handmade - clothing sector and craft are traditional and enduring. The unique textiles and needlework techniques used in couturier apparel incorporate many fine craft skills, as do the shoes, handbags, belts, items of jewellery and other accessories used to complete an outfit or complement a particular 'look'.

In South Africa, these linkages between the sectors are still not generally recognized, but in countries such as India, they are celebrated as fundamental to the growth of both industries and acknowledged as a key element in the hugely successful revival of the craft sector in that country over the past fifty years.

There are indications, however, that attitudes may be changing. Rather than following exclusively European or American trends, a new breed of couturier is beginning to develop ranges within a uniquely South African framework.

Drawing heavily on indigenous motifs and incorporating handmade traditions, such as decorative beadwork or the use of appliqué, a particular market niche has been created which is beginning to stimulate growth in certain sub-sectors within the craft industry as it showcases design traditions and available skills.

This shift is being reinforced in the domestic market by a revival of interest in the wearing of traditional dress across the different levels of society: township to state function. While many African women are still very exact in their observance of traditional detailing, there is a growing tendency to update or adapt these outfits to create a more generic, modern look.

Many of the technikons and technical colleges across the country offer training in fashion through their design schools. Unfortunately, employment opportunities in the established designer clothing industry are limited, while many graduates find it difficult to establish themselves independently. One of the challenges facing the designer clothing sector is the small market in South Africa with sufficient disposable income to afford the usually highly priced finished product. Graduates and even more established SMMEs within the sector are having to explore other options for survival.

There are a number of young designers in the Western Cape who have developed distinctive ranges of less expensive clothing under their own brands. Amongst the most successful of these are the *Naartjie*, *Mad Dog* and *Out of the Blue* labels, all of which now incorporate a full range of children's and adults' clothing. In most instances, the designers started selling informally at high profile markets such as Greenmarket Square or the Blue Shed at the V & A Waterfront, but now have their own shops or a significant presence in an established chain. Although the production of these ranges was initially done in-house, many of them are now outsourced to large, established manufacturers.

As a result of the phasing down in tariffs, the mainstream clothing industry has experienced a sometimes painful process of self-assessment and restructuring. Now more competitive, with lower cost structures, commentators within the DTI suggest that the clothing industry should be able to increase its exports at least four-fold in the next two years by reconciling the trends within the industry towards outsourcing and product specialisation.

Large commercial manufacturers are looking to capitalise on the advantages of (new-found) flexibility and the ability to deal with small production runs. Options include supplying to the international private label market which has grown significantly in recent years and investing in the trend towards African inspired clothing. (An international design shift towards individualism and ethnicity, particularly in the prêt a porter market, supports the latter option.)

Should mainstream industry move towards the development of a more indigenous design niche, there could be obvious advantages for a new generation of clothes designers – particularly young black clothes designers. It will also be interesting to see to what extent established manufacturers will draw on the vigorous creativity of many of the SMMEs in the sector.

There are existing examples of successful collaboration between small clothing and textile producers and large manufacturers, such as the Joint Export Action Group (JAEG), which is driven by the textiles division within the DTI. Initially greeted with some scepticism by large industry players, but now growing steadily, the programme seeks to 'twin' the assets of small and large producers in the development of an export market.

Finally, some important work is being done by the clothing and textile division of the C.S.I.R. (Textek) with regard to the development of indigenous fibres. They are also involved in a certain amount of design work.

<i>Principle categories:</i>	Traditional, functional, designer.
<i>Training opportunities:</i>	Technikons, technical colleges, some NGOs, in-studio training.
<i>Marketing outlets:</i>	Craft markets, tourism centres, curio shops, designer stores.
<i>Organisational structures:</i>	CLOTEX, Cape Clothing Association, Clothing Industry Training Board, C.S.I.R. (Textek).

1.6.4 Beadwork

As with the rest of the country, the beadwork sector in the Western Cape is characterised by the use of largely traditional designs in jewellery production, to enhance clothing or in the decoration of traditional objects. The sector's profile in the province is relatively low and the production and design quality of items often poor. The reasons for this are not clear.

Much of the beadwork in the province is produced by members of the Xhosa speaking community who come originally from the Eastern Cape. It has been suggested that the quality of locally produced beading has suffered due to the fact that many of the truly skilled producers still live in the Eastern Cape while their children and grandchildren are now resident in the Western Cape. Problems of distance and poverty mean that there are limited opportunities for the transfer of important cultural skills.

Other difficulties facing the sector include the cost of raw materials (beads are imported from Europe and the Far East) and the labour intensive nature of beadwork. The potential of the sector is dependent on a revival of traditional skills - particularly technical - together with the development of products which are market driven and truly competitive.

The recent trend towards the manufacture of professionally designed, beaded Christmas decorations is a big step in the right direction. The international Christmas market is huge and South African-produced beaded decorations are

already exciting favourable comment. Other value-added items being developed to enter the top end of the market place include curtain tie-backs and similar products for the interior design market, as well as clothing accessories, such as beaded evening bags, belts etc. for the designer apparel trade.

It has been suggested that the beadwork sub-sector would be a great deal stronger if the multiple small production groups were to organise themselves into a series of clusters. Sharing resources (training, design development, raw materials, production) for greater capacity, they would be able to participate in these new markets far more effectively than is currently the case.

It should be noted that there is also a beadworking tradition amongst the Cape Malay community in the province. Generally used as decorative detailing on clothing and accessory items, the style and techniques employed are quite different to those of the Xhosa tradition. Given the strong needlework/tailoring skills base within the community, there is the potential to revive certain cultural design and technical practices (within the Indonesian tradition) with a view to creating clothing and textiles ranges unique to the Cape Malay cultural community.

<i>Principle categories:</i>	Craftart, designer and functional ware, traditional (costume), souvenirs.
<i>Training opportunities:</i>	In-community/traditional, certain job creation NGOs.
<i>Marketing outlets:</i>	Galleries, certain tourism outlets, in-studio galleries, craft markets.
<i>Organisational structures:</i>	The Beaders Guild (Western Cape).

1.6.5 Metalwork

Among other areas of excellence, the Western Cape was renowned during the 18th and 19th centuries for the work of its silversmiths. Functional ware and decorative objects produced by Cape silversmiths was much sought after and surviving antique pieces command excellent prices.

Following in this tradition are the handful of cutlery producers living and working in the province. Although they do not work in silver, their products combine strong design with production quality and are generally sought after. With the exception of occasional spectacular items, most pieces are cast in a mold and finished by hand. Perhaps the best known of these cutlery makers is Carol Boyes, who has effectively cornered the market with her distinctive, highly designed pewter ware.

With the decline of the use of handmade metal components in engineering processes, there has been a global trend towards the revival of handmade metalwork traditions, particularly forgework.

Functional and decorative, hand forged items are used in interior design, incorporated into aspects of major building developments and increasingly included in the inventory of household ware.

South Africa is no exception to this trend and high profile producers in this field, such as Conrad Hicks (designer blacksmith), are up-beat about the future of the craft.

While the production of highly designed, monumental pieces is currently the most profitable aspect of metalwork for highly skilled producers (one leading producer puts it as high as 90% of output), the majority also manufacture certain functional items in limited quantities e.g. hinges, door handles, cutlery, candle holders etc.

As the local market is relatively small, these lines cannot be produced in sufficient quantities to make the exercise profitable. There is interest, however, in exporting certain product lines to the established interior design and restoration markets in Europe and the U.S.A. One producer suggests that, if properly structured, the development of these markets could lead to the creation of multiple cottage industries with real potential for job creation.

Unfortunately, there are few formal training opportunities for aspirant blacksmiths as most technical training courses offer only welding and no longer include a module on forgework.

Conrad Hicks has identified the ever-increasing demand for tuition as an income generating opportunity and is in the process of establishing a training module for blacksmiths through his studio workshop in Observatory, Cape Town. Incorporating the best elements of existing training models, the course will be available for an hourly fee from August, this year.

In response to the steady growth of the sector, there is a fairly well-developed initiative to create some form of representative grouping, such as a Blacksmiths Guild or Association. This body will lobby for sector interests and establish a communication network nationally and internationally.

Operating on a very different level, are the large numbers of wireworkers producing and selling in the Western Cape. Creating mostly functional and decorative wares, these craftspeople are often highly skilled and possess a sophisticated design sense despite being untrained in a conventional design environment.

There is a large number of South African wireworkers, but many of the best producers working locally are originally from Zimbabwe where there is a very fine wirework tradition. Although operating in an informal environment, some observers feel that these Zimbabwean wireworkers are positively impacting locally produced work in terms of production quality and design while the more successful amongst them are actually employing South Africans on their production lines.

Most wirework available in the Western Cape is sold informally on the side of the road. Despite the quality of the work and the fact that the inclusion of at least one piece of wirework is almost mandatory in South African homes, high availability and an informal selling context have substantially undermined the market value of wirework products and formal retail outlets do not usually stock it as a result.

However, there are exceptions to this where partnerships have developed between retailers and wireworkers, often around the development of an exclusive product or product range for the retailer. Generally financially beneficial to both parties, these collaborations also often expose producers to a fairly intensive transfer of skills process (design, costing, delivery schedules etc.).

As with beadwork sector, there is an opportunity in the wirework industry to get producers off the streets and to organise the currently fragmented sector into a series of production clusters. Not only would this build production capacity, but it would facilitate specialised product development and enable producers to command better prices for their wares.

<i>Principle categories:</i>	Craftart, designer and functional ware, souvenirs.
<i>Training opportunities:</i>	In-community, certain job creation NGOs, in-studio (forgework and cutlery production).
<i>Marketing opportunities:</i>	Galleries, certain tourism outlets, in-studio galleries, craft markets, informal trading (wirework only).
<i>Organisational structures:</i>	A Blacksmiths Guild is being formed.

1.6.6 Jewellery

South Africa provides about 25% of all raw materials used in jewellery production world-wide, yet contributes less than half a percent to the fabricated jewellery industry. This is probably due to the fact that the country lacks a culture of precious metal jewellery adornment and the related indigenous traditions of precious metal jewellery making. However, the situation may be slowly changing.

With the decline in demand for unbeneficiated gold, mining houses have expanded their support of the jewellery sector and are increasingly investing in training, the promotion of 'African' branding and the development of local designers. One mining house sent a study tour to Mali to investigate their fine tradition of indigenous jewellery production, while others sponsor major jewellery design competitions.

Platinum houses are following this trend with sponsorships for the marketing of platinum jewellery and the donation of facilities and equipment in platinum jewellery making³.

The national government encourages the trend towards 'Afrocentric' branding in the jewellery manufacturing industry as well as greater participation in the high volume export markets which South Africa has only just begun to enter. There is potential for growth in this area, particularly to the United States, where South African jewellery does not incur import duty.

Gold is the precious metal predominantly used in South African jewellery manufacture, although there is also a substantial amount of work done with silver and platinum. The main source of gold is Rand Refineries who supply it first to the South African Reserve Bank who then sell it on to, amongst others, members of the jewellery industry.

In a recent development aimed at facilitating affordable access to gold for jewellery manufacture, Rand Refinery has offered existing customers the right to purchase gold on loan well below previous rates. Finished pieces are used as collateral on gold borrowed at a fee linked to the international gold lease rates. (Unfortunately, Cape jewellers are disadvantaged by this arrangement as all stock ceded as collateral must be stored in Gauteng and the manufacturer is responsible for the cost of transport and security.)

³ One Cape based jeweller interviewed suggests there is important potential in this segment of the industry in South Africa as the cost of raw materials and the need for highly specialised skills are resulting in a decline in platinum jewellery production by leading European producers e.g. Italy.

There are approximately 100 jewellery manufacturing firms located in the Western Cape, the majority operating in and around the Cape Metropolitan Area, although there are jewellery production nodes in the George-Knysna area and Worcester.

Generally family owned, manufacturing processes vary from mass production (usually using casting) to handcrafted pieces, with some firms offering handcrafted pieces in addition to factory produced items.

Despite the promotion of 'African' branding by government, most firms have not developed this design niche. With the growth of tourism in the Western Cape, there has been an increasing demand for handcrafted jewellery made with 'African' gold and reflecting 'African' design. This market is set to grow as tourist numbers increase and represents a major opportunity for the jewellery manufacturing industry in the Western Cape. While firms producing more traditional handmade jewellery are also serving this market, firms providing a more 'African' flavour will be most in demand.

In 1999, with the encouragement of the Department of Trade & Industry (DTI), the Jewellery Council of South Africa began creating an export council for manufacturing jewellers, which will focus on the research and development of South African jewellery exports.

Western Cape based firms have experienced no difficulty in being offered large contracts, especially from the United States. However, many have been hesitant to take on large volume contracts because of doubts regarding their ability to deliver according to contract terms which demand exceptionally high volumes. Initiatives such as the new 'technopolis' where skills and resources will be pooled may give the Western Cape an edge on capability in this area.

There are a number of high quality training options for those who wish to enter the jewellery manufacturing industry, yet skills appear to be declining nationally. This is attributed in large part to the negative perception that jewellers and goldsmiths have 'factory' jobs and an unattractive career path, a view which is particularly prevalent in the Western Cape. Although design quality is high in the province, handcrafting firms complain of a lack of highly skilled craftsmen, too much specialisation of skills and not enough cross-over skill in mass production techniques.

Training options available in the Western Cape include that offered by the Cape Technikon, the Faculty of Fine Arts (Stellenbosch University) and apprenticeships

through established jewellery studio workshops. The province is also in the process of conducting a capability analysis to determine benchmark standards and capacity.

In line with national government, the provincial government in the Western Cape supports the growth of the jewellery industry. Plans include a future fund which will direct government support to those sectors with high growth potential. Jewellery manufacturing has been identified as one of those sectors.

<i>Principle categories:</i>	Designer, traditional, craftart.
<i>Training opportunities:</i>	Cape Technikon, Faculty of Fine Arts (Stellenbosch University), in-studio apprenticeship.
<i>Marketing outlets:</i>	Galleries, some curio shops, dedicated jewellery stores, some craft markets.
<i>Organisational structures:</i>	Jewellers and Goldsmiths Union, Jewellery Council of South Africa, Cape Jewellery Manufacturers' Association, Jewellery and Precious Metals Industry Training Board.

1.6.7 Woodwork

As in Kwazulu-Natal and Gauteng, the Western Cape has a substantial woodworking industry, the main segment of which is the production of furniture. While the province has softwood plantations of its own, the bulk of wood used for manufacturing purposes is imported from the Northern Province or Eastern Cape.

Most manufacturing takes place in and around the Cape Metropolitan Area, with a further major production node in the Southern Cape, home of South Africa's hardwood forests (mainly blackwood, yellowwood and stinkwood). High quality furniture manufacturing is concentrated in the Knysna-George area and producers are well-known for their use of local indigenous woods.

Entry into the global markets, post 1994, has forced the South African furniture industry to adapt to the cut and thrust of international competition. Although painful initially, the changes have been good for the sector. More intensive training has led to an improvement in labour productivity, while the investment in new machines and equipment has increased substantially.

The industry is dominated by several large producers who supply the major furniture chains, such as Joshua Doore and Morkels. However, there are a growing number of small firms, with a focus on high quality products in a wide range of market segments, which are playing an increasingly important role in both the domestic and export market.

Renewed access to world markets has created opportunities for Western Cape furniture producers, particularly with regard to items produced in the 'Cape country' style, hardwood products and contemporary-design furniture. The United Kingdom, Germany and the United States are the main destinations, but other markets continue to grow and volumes are likely to increase, especially in the sphere of (flat packed) knock down furniture. International leaders, such as the Swedish interiors and lifestyles chain, Ikea or the British, Habitat, have demonstrated the immense potential of this market.

Other developments of interest include the impressive turnover achieved in the more specialised segments of the furniture industry, such as kitchen and bathroom furniture, built-in cupboards, the garden furnishings market, which although still in its infancy in South Africa, looks set to grow rapidly⁴.

The Western Cape is fortunate in having a relatively strong skills supply base and sufficient unskilled labour. Industrial relations are regulated by the Bargaining Councils, together with the Cape Furniture Manufacturers Association and the Furniture and Allied Workers Union. It should be noted, however, that a significant number of small and micro-enterprises operate outside this framework.

<i>Principle categories:</i>	Craftart, designer and functional ware, traditional, souvenirs.
<i>Training opportunities:</i>	In-community/traditional, certain job creation NGOs, in-studio.
<i>Marketing opportunities:</i>	Galleries, certain tourism outlets, in-studio galleries, craft markets, interior design stores.
<i>Organisational structures:</i>	The Woodturners Guild (Western Cape), the Cape Furniture Manufacturers Association, the Furniture and Allied Workers Union.

1.6.8. Items from recycled materials

The use of recycled materials in the production of often unique handmade items has been identified by international product developer, Mara Amats, as an important potential niche market for the South African handcraft industry.

This sector consists of a broad cross-section of functional and decorative items made from materials such as plastic bags, aluminium cans or telephone wire. Certain of these products, such as the more sophisticated telephone wire baskets (Kwazulu-Natal) are now regarded as collectors' items and can sell for substantial sums of money (R2500+).

⁴ Capitalising on this trend, there have been a handful of government sponsored pilot projects where alien vegetation cleared from state forests and riverbeds has been used in the production of rustic garden furniture in the American and European tradition. Ranging from fencing lengths through to plant frames, tables and chairs, products have been enthusiastically received by the public and show real market potential.

<i>Principle categories:</i>	Craftart, designer and functional ware, souvenirs.
<i>Training opportunities:</i>	In-community/traditional, certain job creation NGOs.
<i>Marketing opportunities:</i>	Galleries, certain tourism outlets, in-studio galleries, craft markets, informal trading.

1.6.9 Indigenous and exotic plant/flower products

This sector includes the use of indigenous plants for cosmetic and medicinal purposes, the cultivation of endemic bulbs for export, the preparation of fresh and dried cut flowers for export and, more recently, the use of plant material in the production of interior design items.

Due largely to the historical emphasis on primary product supply in South Africa, very little value is added to existing products within this industry and nowhere is this more evident than within the dried flower/plant materials sector. Although preparation for export may involve a number of processes such as dyeing or, possibly, glycerine treatment, it is only once the products reach their destination that significant value is added.

A brief review of the catalogue of any of the major floral distributors vividly illustrates product options. Posies, wreaths, decorative balls, topiaries, flower arrangement kits and packages of component parts for sale in garden centres and craft outlets are just a few of the ranges – available in a variety of colourways - developed by international merchandisers in recent years.

The world market in decorative (especially dried) floral and plant materials is growing steadily and, as with the fashion industry, new ranges are launched every season. International floral masters have recommended that members of the South African industry develop value-added products of their own if they wish to compete and grow this sector further in the long term. Implementation of this strategy would include a fundamental shift in mind set within the industry as well as a major investment in product design and the necessary skills training. The rewards, however, would be substantial.

Of considerable importance to the South African plant products industry must be the growing international awareness of the country's extraordinary diversity of indigenous plants suitable for cosmetic and medicinal purposes. Interest in the use of these plants has been expressed by mainstream pharmaceutical and cosmetic companies, as well as the increasingly important manufacturers of natural or homeopathic remedies. Furthermore, a number of major bulb and seed supply companies have begun developing options for the cultivation and export of certain of the most important species.

The sector's potential for job creation is largely unrecognised by government and the development sector, however there is one interesting pilot project underway in the small village of Pella, on the West Coast. In an initiative which is now about two years old, this small rural community is working in partnership with provincial government and the private sector in the cultivation of bulbs for the export market. The experiment is being watched closely and if successful, could provide a model for similar projects elsewhere in the province.

The development of the indigenous plant industry could be of considerable financial importance to the Western Cape, home to the unique Cape Floral Kingdom which incorporates many of the species with the greatest commercial potential. However, as has been demonstrated on a number of occasions, South Africa is slow to understand the wealth inherent in its indigenous plant kingdom and is neither vigilant in its protection nor visionary in its development. Having forfeited control of the trade in freesias, pelargonias and gladioli (all indigenous species), South Africa loses literally billions annually to the Netherlands, which saw the potential in these plants as long as two centuries ago and has invested heavily in their development. This pattern continues.

In recent years, fairly strong competition has developed with countries such as Israel, Australia, Zimbabwe, Mexico and the United States (Hawaii, New Mexico, Arizona), where indigenous South African plant species are being successfully cultivated.

This has implications for the whole South African plant products industry, from cut flowers to the supply of plants for medicinal and cosmetic purposes. Government and industry leaders should work pro-actively to realise the economic potential of this unique resource ensuring that the considerable benefits impact South Africa first rather than its many competitors, as is currently the case.

<i>Principle categories:</i>	Designer and functional, traditional, souvenirs.
<i>Training opportunities:</i>	In-community, private sector, certain job creation NGOs, private sector.
<i>Marketing opportunities:</i>	Galleries, certain tourism outlets, in-studio galleries, craft and flower markets, florist shops, nurseries and garden centres.
<i>Organisational structures:</i>	South African Protea Exporters (SAPEX).

2. KEY STATISTICS AND FIGURES

Due to the fragmented and largely undocumented nature of the craft industry, there is currently little in the way of conventional statistical information

available. There can be no doubt, however, that the sector has experienced rapid growth since 1994, thanks to the boom in the tourism industry and greater levels of government support.

To give some sense of the opportunities for income generation presented by the sector, a brief profile of economic activity in some key sub-sectors is listed below. Only fairly established studio workshops producing mostly a combination of *craftart* or *functional* ware have been included:

Ceramics (studio workshop)

The ceramicist interviewed produces on two levels: unique one-off pieces (*craftart*), usually for major exhibitions and in response to orders and limited editions of *functional ware*, again to order, but also as stock for sale in his in-studio gallery. *Craftart* pieces are often very big and take considerable time to produce. As a result, production and turnover can fluctuate substantially depending on the nature of orders or whether or not work is being produced for a specific exhibition. The figures below represent monthly averages over a twelve-month period.

Average production per month:	600 – 800 small pieces (<i>functional ware</i>) per month plus 12 large pieces over a 6 week cycle (<i>craftart</i>) = 50-70 over a year.
Number of employees:	1 (3 people working full-time).
Average turnover per month:	R12 000 - R16 000.
% Domestic market:	60% orders and exhibitions across the country. 40% sold locally in-studio gallery (these sales can be split evenly between foreign (mostly small items) and domestic visitors (a mixture).
% Export market	None.

Textiles (studio workshop – emerging entrepreneurs)

The figures quoted in this profile are drawn from a women's job creation project in Cape Town. Their product range consists of tablecloths, wallhangings, T-shirts and lengths of fabric for use in the manufacture of aprons, oven gloves and placemats. All fabric designs are original and production processes consist of a combination of handscreening and handpainting.

The group works fairly efficiently, but income figures are negatively impacted by the fact that they are currently producing more than they can sell as they require critical assistance with marketing.

Average production per month:	200 cloths (averaging 150 x 150cm each) ⁵
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⁵ This figure could increase in response to demand.

Number of employees:	14
Average turnover per month:	R18500 (for the group)
% Domestic market (local):	50%
% Domestic market (foreign):	50%
% Export market:	(no consistent market)

Woodwork (studio workshop)

All designs used in production are developed in-house and the product range is diverse and market driven. Most items produced are fairly small and the wood used varies from fine hardwood to alien vegetation, such as blue gum, Port Jackson etc. The company has recently entered into an interesting joint venture partnership with the Working for Water programme around the production of walking sticks from alien vegetation for the Canadian export market.

Average production per month:	500 units (no large items, products range from coffee tables, through a variety of small décor items, to walking sticks).
Number of employees:	3 permanent staff. 20 producers paid per piece via a joint venture arrangement with the Working for Water project.
Average turnover per month:	R40 000.
% Domestic market:	20%
% Export market:	80% (Canada – walking sticks, Australia, England - small décor items).

Metalwork (studio workshop)

The blacksmith interviewed has been in production from his own studio for 5 years. He has a strong core market, but sites lack of public understanding and appreciation regarding the specialised and value-added nature of forge skills as a particular frustration. Ignorance in these areas can impact a client's initial expectations around delivery timeframes and, sometimes, price.

He also underlined the importance of maintaining smooth production processes, even with customised pieces, which often require specially manufactured tools and creative resolutions to manufacturing difficulties.

Average production per month (total):	855
Production items (curtain rings, rods, tiebacks, door handles, hinges etc.)	850
Custom made items (highly designed and worked – largely monumental pieces e.g. gates, balustrades, doors):	4 – 5
Number of employees:	4 (trained in-studio)
Average turnover per month:	R30 000
% Domestic market:	75% (Cape Town) 25% (Johannesburg and further afield)

% Production items:	50%
% Custom-made items:	50%
% Export market:	0 (investigating options)

Jewellery (studio workshop)

The jeweller interviewed works predominantly in the highly specialised area of platinum jewellery production. He produces on a commissions-only basis with the domestic market and has recently become part of a small jewellery production cluster specifically servicing the export market to the United States (custom made pieces only). Rings, neckpieces and earrings.

Average production per month:	8 - 10 original pieces per month
Number of employees:	1
Average turnover per month:	R30 000 – R50 000
% Domestic market:	30%
% Export market:	70%

3. PROFILE OF THE INDUSTRY IN THE WESTERN CAPE

There is a high level of craft activity in the Western Cape encompassing craft production, retail, training, raw materials supply and more. Directly linked to the rapidly growing tourism industry in the province, estimates suggest that the craft sector may turn over well in excess of R100 million per annum and employ some 15 000 - 30 000 people.

Much of the design and production capacity of the craft sector in the province is situated in and around the Cape Metropolitan Area, although there are nodes of craft activity elsewhere - usually in regions with a strong or growing tourism industry e.g. the Knysna-Plettenberg Bay stretch of the Garden Route, the Hermanus area in the Overberg, most of the Winelands and the southern West Coast region.

3.1 Recent development patterns

A recent audit of craft industry assets in the Western Cape has highlighted the fact that the sector's real strength in the province lies in *retail*. There are more than 300 retail outlets in the province and a significant number of informal and formal craft markets, many of them attached to tourist destinations and festivals. In addition, there are regular agricultural shows and other special events in the rural areas which usually include some form of craft market as a core activity

Although there is a strong domestic market for locally produced functional items of high production and design quality (the work of mostly white crafters), the tourist-led demand for distinctively 'African' items is generally met either through

the sale of products from other parts of South Africa or from elsewhere in Africa (the majority of products are sourced from other countries in the S.A.D.C. region).⁶

Furthermore, discussions with national retail chains targeting the tourism industry indicate that, although overtly 'African' items may be imported from outside the province, a broad variety of more generic products are purchased from local craft producers (mostly white). These are distributed through their outlets nation-wide and, in addition to the clothing lines already mentioned, would include items such as Carol Boyes' cutlery, Clementina van der Walt ceramics and a number of other décor products.

Informal craft traders (mostly from countries in the S.A.D.C. region) who have flooded into the Western Cape since 1994 are seen as a threat by many craftspeople, local residents and even some officials. Highly organised, these traders possess strong entrepreneurial skills and the products they offer are often superior in terms of variety, price and quality.

There are, of course, exceptions to this and high quality work by local black crafters is available through certain outlets in and around Cape Town, such as the Montebello Design Centre (Newlands), Africa Nova (Hout Bay), Philani Flagship (New Crossroads) or the Masezakhe co-operative in the Red Shed (V & A Waterfront). These producers do not have sufficient capacity to manufacture in large quantities, however and their products tend to be only locally available.

3.2 Development dynamics affecting the industry

In order to understand this trend, it is important to note that craft production in the Western Cape is strongly segmented along racial lines and there are relatively few local coloured or African people involved in the production of traditional cultural and functional items. This is due largely to the cultural and political history of the province.

Unlike many other regions within South Africa, there is no dominant cultural influence in the Western Cape which fundamentally impacts the character of the province through highly visible traditional design and indigenous handcraft practices.

⁶ The asset audit suggests the percentage of locally produced items sold through these outlets could be as low as less than 5%. It should be noted, however, that this figure is an estimate only and the percentage may, in fact, be higher. For example, it is not clear whether the 5% includes items such as clothing (T-shirts etc.), much of which is sourced from manufacturers in the Western Cape.

The largest population grouping in the province is coloured, a community with a complex cultural heritage drawing as it does on Khoi, San, European (colonial), Indonesian (slave) and African traditions. Due to the rigours of the apartheid system and limited access to the sources of craft production (transmission of skills, raw materials etc.), many indigenous or traditional skills have been lost. This applies, also, to the predominantly Xhosa speaking members of the African community in the Western Cape.

The province's diverse cultural legacy is not currently being translated into quality products with a strong local identity. An opportunity exists to develop a multi-faceted, uniquely Western Cape aesthetic which could be marketed under a regional brand with strong links to the burgeoning tourism industry in the province.

3.2.1 Craft production activity by cultural group

As mentioned above (see no.3.1), most of the highly visible traditional 'African' products sold in the province are sourced from elsewhere, while the work of many white craft producers reflects a mixture of cultural influences and is not always identifiable as an indigenous product. It would be difficult, therefore, to pinpoint exactly which cultural group is responsible for the highest degree of craft production activity in the province.

Cultural traditions and access to training and resources also influence the level and variety of skills across different communities. Certain product sub-sectors appear to be more dominant in some communities than others, however and can be summarised across cultural groupings as follows:

3.2.1.1 White community

Due to the waves of immigration to the region over the centuries, the work of white producers in the Western Cape reflects multiple influences in terms of craft skills and design (European, African – including Khoi and San).

Generally able to access resources and training more easily than their counterparts in the black and coloured communities, white crafters often have high levels of production and design skill and the province boasts a number of craftspeople of exceptional ability across a variety of disciplines.

Principle sub-sectors:

Ceramics, textile treatments (including a variety of needlework processes), jewellery, woodwork, plant products, metalwork.

Secondary activities (not as prevalent, but some outstanding producers operating in the province):

Candlemaking, glass blowing, beadwork, papermaking, leatherwork.

3.2.1.2 African community

Handcrafted work by African producers is often strongly traditional in product type and design, although the trend towards urbanisation has resulted in the development of some interesting new skills and products with wide market appeal e.g. items from recycled materials, such as aluminium softdrink cans.

While there are producers of great ability in this community, limited access to skills training (traditional or otherwise) and resources has negatively impacted quality standards and production capacity amongst many black crafters. Craft development and SMME support programmes instituted by government and a variety of NGOs are seeking to reverse this trend.

Principle sub-sectors:

Needlework processes (traditional clothing, useful objects), beadwork (traditional jewellery), items from recycled materials, plant products (cosmetics, traditional remedies) etc.

Secondary activities (not as prevalent, but some crafters producing high quality work):

Textile printing and painting, leatherwork, ceramics, weaving.

3.2.1.3 Coloured and Muslim community

Many of the traditional craft production skills originally practised by members of these communities have been almost completely lost over the years. Remnants of a rich cultural legacy provide the basis for a renaissance which is long overdue. Influences include Indonesian, European and a strong Arabic design component in more orthodox Muslim sections of the community.

Principle sub-sectors:

A variety of needlework processes (including dressmaking and tailoring as important elements), beadwork (in a very different tradition to the various African equivalents), woodwork, restoration processes (thatching, plaster moulding), food and confectionery art, leatherwork and devotional pieces.

3.2.2 Craft retail activity by cultural group

Although there are exceptions, it is probably true to say that handcrafted items by white producers are available through a variety of formal retail outlets (popular craft markets, interior design shops and galleries), while crafters from the

coloured and black communities still tend to sell their work informally. Levels of skill, access to training and resources and most specifically, the type of products (i.e. design), being produced by many crafters from these communities all serve to perpetuate this situation.

3.3 Main markets including export

As mentioned previously, the craft industry in the Western Cape is closely linked to the tourism industry. As a result, most important marketing opportunities currently occur at major tourism nodes as follows:

- ? Scenic viewpoints or sites of cultural significance.
- ? Festivals or events with a high tourism profile.
- ? National parks and botanical gardens.
- ? Township tours which may include stops at craft production projects with in-house retail.
- ? Studios or galleries incorporated in an art or craft route.

It is important to note, however, that the market is not homogeneous and while a foreign tourist may have certain expectations of what constitutes a typically “African” product, domestic visitors may be looking for something completely different. Furthermore, export patterns indicate that the kind of handmade products bought by foreign tourists while visiting the country often differs radically from what may appeal to them when shopping at home. While there is definitely a market for traditional cultural products, established exporters indicate that high volume orders often relate to those items which have been adapted – or developed specifically - for the export market (usually in a more *generic* style with broader international appeal).

With their multi-faceted design and skill traditions, this trend towards a generic international style presents unique opportunities to Western Cape crafters and local product development strategies should be two-pronged:

- ? to develop products with a strong local identity to service the needs of foreign tourists (closely linked to the tourism industry), and
- ? to develop more generic products, which may reference elements of cultural tradition, specifically for the export market.

3.3.1 Visiting tourists (foreign and domestic)

While the majority of craft producers tend to focus on the spending power of foreign tourists, there are many more domestic (i.e. South African) tourists travelling to the Western Cape. These visitors come to the province for both leisure and business purposes and represent a market opportunity that is currently underdeveloped.

Unlike the foreign tourists, the majority of South African visitors would probably not be interested in buying traditional African artefacts from outside the province, as these can be as easily purchased at home. However, they are interested in buying items which they are unable to get locally (often *craftart*, *designer* or *functional ware*) or a memento with some Western Cape reference which will remind them of a wonderful holiday. With the cultural diversity and high level of craft skills (in some sub-sectors) in the Western Cape, local crafters should position themselves to take greater advantage of this important market segment.

3.3.2 The local market

There is a strong local domestic market in the Western Cape, mostly for locally produced *functional ware* e.g. Carol Boyes cutlery or Clementina van der Walt ceramics. There are a relatively large number of retail outlets servicing this market, best described as interior design or lifestyle oriented, particularly in the Cape Metropolitan Area. Sophisticated and stylish, certain of these retailers have broadened their base to target both the domestic and the more discerning international visitor with great success.

3.3.3 Craft markets

Neighbourhood craft markets also present retail opportunities for craftspeople. Generally well established and attractively situated, many of these markets are run by co-ordinators who are highly active, giving direction and support to crafters and playing a mentoring and quality control role.

Participants are still predominantly from the white community and combine professionals with amateurs who produce for fun, although there is a growing contingent of craftspeople who use their skills as an important second income stream. Many black or coloured crafters are interested in participating in the more established, successful markets, but are usually prevented from doing so primarily by difficulties around access (most are located in affluent suburbs some distance from central transport nodes) and affordability (the cost of hiring a stall).

The quality of products available at craft markets varies, but it is sometimes possible to come across new talent. Providing an excellent forum in which to test the market viability of new products, craft markets offer many participants a reasonably secure, unthreatening environment in which to develop essential marketing skills.

Craft markets are usually held once or twice a month and more established crafters often do a 'circuit' following markets around a certain area (e.g. the Cape Metropolitan Area) as well as participating in fringe events at major festivals around the province, such as the Klein Karoo Kunstefees (Oudtshoorn), the Whale Festival (Hermanus) or the Oyster Festival (Knysna).

3.3.3.1 Informal markets

Although there are informal markets in most rural towns, products usually consist of clothing or mass-produced household items. When craft items are available, they are generally imported from outside South Africa.

3.3.4 Festivals and major events

Under increasing pressure to include opportunities for SMME development into festivals and other major events, organisers are beginning to integrate different sectors within cultural industries into existing programmes. This trend presents real opportunities for members of the craft industry.

The Cape Metropolitan Council, through its Cape of Great Events project, has taken the lead in the Western Cape and has already provided opportunities for local craftspeople in several major events. Participation has taken the form of craft markets, demonstrations and formal exhibitions.

Further opportunities for participation include the use of handcrafted items in the design of marketing materials for events (e.g. wirework cutlery used in the Cape Gourmet Festival brochures and posters), as well as corporate gifts before, during and after an event.

3.3.5 Export

Participation in international trade missions and fairs has confirmed the export potential of South African craft. Primary markets, already fairly well established, include the United Kingdom, the Benelux countries, France and Germany, while

the United States is growing steadily - especially the African-American market which represents a major opportunity for the South African craft sector.

Increasingly affluent and well-travelled, African-Americans have historical ties to the continent and strong emotional ties to South Africa, in particular. Familiar with the craft traditions of West African countries, such as Ghana and Mali and isolated from South Africa by the years of sanctions, African-American consumers see the country's craft products as something new and original.

Although there is interest in traditional South African cultural items in the African-American market, more *generic* handmade products offer the greatest potential for export development. Sector opportunities in this market are varied, ranging from interior design and lifestyle products, through jewellery, to designer apparel, Christmas decorations and more.

The craft industry faces certain challenges in entering the export market the most important of which are:

Price – South African producers cannot compete with low production costs in the East and other parts of Africa.

Quality control – South African crafters have much to learn about the importance of high, uniform quality standards.

Production capacity – overseas buyers usually place high volume orders and most South African crafters do not have the capacity to fill the orders within a required timeframe. Failure to meet a delivery deadline usually leads to the cancellation of an order.

Administrative infrastructure – many crafters do not have the necessary infrastructure or experience to deal with international clients.

Product design – South African crafters need to adapt their products to follow international trends more closely (while maintaining an indigenous identity). They also need to expand their ranges through the development of new products on a regular basis, in line with common international practice.

As with so many other sectors in South Africa, the craft industry is having to organise itself to meet the challenges of the global market in order to realise the opportunities it presents. There are already a number of highly successful locally based craft producers who are exporting to both Europe and the United States. This number should grow steadily in the coming years.

In a move to support export development in the sector, the national Department of Arts, Culture, Science & Technology and the Department of

Trade & Industry are working to form a Craft Export Council similar to that formed for the jewellery sector. Discussions are still in the early stages, but when formed, this structure will have representatives in each of the provinces and could do much to facilitate the development of the craft export market.

3.4 Relevant Government legislation and support programs influencing the industry

Neglected for years by government, craft is now recognised as an important sector with potential for job creation and export market development.

Summarised below are brief outlines of those role-players (government and non-government) most important to the Western Cape.

3.4.1 The Department of Arts, Culture, Science & Technology

Since 1994, national government has become involved in the craft industry through the national Department of Arts, Culture, Science & Technology (D.A.C.S.T) which has a dedicated craft development unit and works closely with other relevant government departments, such as the Department of Trade and Industry (which includes a craft desk under SMME development) and the Department of Environmental Affairs and Tourism.

During the period 1997-1998, D.A.C.S.T. formulated a *Cultural Industries Growth Strategy* (C.I.G.S.) which for the first time spelt out specific strategies for the development of four key cultural industries. Selected by government for intensive promotion on the basis of their potential to create employment and generate foreign exchange, the four industries are: music, publishing, film and craft.

Sector reports were commissioned for the C.I.G.S. process which contain a number of findings and recommendations on each sector that make interesting reading for anyone wishing to understand the different sectors or implement support programmes. The reports are available on the D.A.C.S.T. website (www.dacst.gov.za).

3.4.2 The National Arts Council

Established as a statutory body in September 1994, the N.A.C.'s mission is to "develop and promote excellence in the arts".

As the principle funding agency for arts development in the country, the National Arts Council has recently assumed a 'hands on' responsibility for the craft sector nationally and plans to implement far-reaching strategies for sector development with immediate effect.

Cornerstones of the strategy will be programmes to address training (product development, production, costing and business administration) as well as access to markets. Implementation will take place incrementally, starting with the Eastern Cape, Kwazulu-Natal, Northern Province and Mpumalanga, followed thereafter by the rest of the country.

3.4.3 National Crafts Council of South Africa

A National Crafts Council of South Africa has been established over the past ten years which maintains a national network with representatives in all provinces.

Although this body does not have official (i.e. national government) status as a designated body for craft development in the country, it works increasingly closely with relevant government departments and agencies in the formulation of policy and the implementation of programmes.

On-going N.C.C.S.A. initiatives include:

- ? a substantial database of craft producers and related industry players (several thousand entries),
- ? a quarterly industry newsletter with a national distribution,
- ? a variety of craft training programmes, and
- ? a biannual national craft competition and exhibition which includes the publishing of a comprehensive catalogue of exhibits (in partnership with the FNB Vita Awards programme).

3.4.4 The Craft Sector Partnership (Western Cape)

In a groundbreaking initiative driven by the provincial Department of Economic Affairs, Agriculture and Tourism, an inter-departmental forum for craft development was formed in May 1999. Known as the Craft Sector Partnership (C.S.P), objectives of the body include:

- ? working to prevent unnecessary duplication,

- ? sharing of resources,
- ? development of a common vision, and
- ? the creation of an integrated policy for growth of the sector in the province.

Partnership members include key role-players and stakeholders in the industry in the province as well as other relevant provincial government departments, such as the Department of Cultural Services and the Department of Social Services.

In December 1999, the Craft Sector Partnership commissioned an audit of craft assets in the province. The brief was to collect basic data about the existing industry and develop a strategic framework that utilised and added value to existing craft activities, assets and resources. The framework was intended to provide direction to the Partnership on how to stimulate and promote the craft sector in the province.

Completed by March 2000, the findings and recommendations of the asset audit are spelt out in the document *Creative Cape: A craft development strategy*. Key recommendations of the strategy include:

- ? the creation of a Western Cape Craft Business Centre,
- ? the development of a craft training fund,
- ? the development of a craft product development and marketing fund, and
- ? a 'Creative Cape' campaign (to nurture creativity and raise the profile of the craft industry in the province).

Key decisions regarding the implementation of the strategy recommendations will be taken over the next three months, with a programme for implementation following shortly thereafter.

4. CURRENT KEY ISSUES AND CHALLENGES

Comprehensive research into the craft industry in the Western Cape has highlighted certain priority areas requiring some form of constructive intervention to aid the sustainable growth of the sector in the province. It is of interest to note that these priority areas are not unique to the Western Cape alone, but are common to the industry throughout the country.

4.1 An institutional framework

There is a need to develop and co-ordinate support structures and physical resources necessary to ensure sector growth. Many of these already exist, but

either require further capacity building or linkages with other service providers to be properly effective.

Experience has shown that central to success in this important area would be the appointment of an accredited – and dedicated – implementing agency to encourage and co-ordinate the following:

? **Information sharing**

Public and private agencies need to pool their resources at provincial and local levels through mutually agreed plans of action. Strategies for sector development need to be tailored to local conditions and, where possible, draw on local partners for effective implementation.

? **Co-ordination and networking**

Co-ordination and networking is required to hold development programmes together and to ensure the free flow of information necessary to the implementation and evaluation of strategies.

4.2 Entrepreneurial development

It is necessary to build the capacity of craft producers holistically through the provision of key support services and a variety of integrated training modules and workshop programmes to address the following:

? **Product development**

Local craft products cannot compete on price with products from the Far East or the rest of Africa. In this context, superior design, innovative use of materials and production quality become critical. Crafters need exposure to markets and trends, training in market research and product development and on-going mentorship.

? **Business skills training**

Craftspeople operate as small businesses and basic business skills are essential. In some instances, it may be necessary to build basic literacy skills and self-esteem, also.

? **Business development and mentoring support**

Craft entrepreneurs need on-going and appropriate support to enable them to become financially viable. Although there are numerous support packages

available to SMMEs, there are none specifically tailored to meet the needs of the craft sector.

? **Access to raw materials**

Access to raw materials and tools is often the single factor preventing crafters from utilising existing skills. Distances and pricing are the two major barriers in this regard, particularly in the rural areas.

? **Finance**

Access to start-up and working capital for materials, transport, marketing and other input costs would make it possible for many more people to enter the craft sector. Financial institutions should be encouraged to create products tailored to the needs of micro-entrepreneurs.

4.3 An integrated strategy for market development

It is important to position locally produced craft products within domestic and international markets via an integrated 3 - 5 year market driven development strategy, particularly where public funds are involved. Key aspects of the strategy would include :

? **Product packaging and presentation**

Many craft producers need assistance with professional product packaging and presentation. Although good packaging will not sell a bad product, it can do much to enhance an item which is already appealing. For example, many South Africans also underestimate the importance of labels telling the 'story' of the product, especially with regard to items produced by job creation products. This is a seemingly small detail, but can sometimes make the difference between selling a product or not.

? **Marketing support**

Small-scale producers need to market and sell co-operatively and to have access to market feedback to guide product development. Many crafters are either too busy producing to market or do not have the necessary skills. A joint marketing programme is needed to develop both the domestic and export markets.

? **Access to retail outlets**

Although the retail sector is growing fast, most shops carry stock from outside the Western Cape. Good quality products with a distinctive local design niche need to be developed and promoted under a Western Cape brand. Retail opportunities should be developed at major tourism nodes (e.g. a *bijou* shop within an existing shop) and more diverse and accessible craft markets

developed in high profile locations. Incentives should be offered to owners of large chains targeting the tourism industry, such as Kraalkraft or Tigers Eye, to sell a minimum of local content in their Western Cape stores.

5. GROWTH PROSPECTS

5.1 Export markets

As mentioned previously (see item 3.3.5), there is a reasonably established export market to Europe and the United States. This market is likely to expand fairly rapidly over the next few years as the sector becomes more organised and competitive.

Growing interest from Canada and Australia (partly as a result of the large South African ex-pat communities resident there) suggests further opportunities for export market development to these countries.

5.2 Specific investment and growth opportunities

Opportunities in the Western Cape craft sector continue to be largely retail based and associated with aspects of the tourism industry. However, certain support services and training needed by the industry may also present opportunities for private sector involvement depending on how it was structured. A brief list of specific (i.e. project driven) and more general (i.e. good idea) opportunities follows below:

5.2.1 Specific investment opportunities

? *The new Convention Centre (central city, Cape Town)*

Interior decoration. The design team has been instructed to source local products and skills wherever possible.

Enquiries: Wesgro, Property Management Desk (Department of Economic Affairs, Agriculture & Tourism, Western Cape).

? *Swellendam Cultural Centre (Swellendam, Overberg region)*

A major cultural tourism development incorporating retail outlets, restaurant, a variety opportunities for the development of short-break packages etc.

Enquiries: Wesgro, David Schlapobersky (chairperson of steering committee), Swellendam Local Authority.

? *Lookout Hill (Khayelitsha, Cape Town)*

A major cultural tourism development driven by Tygerberg Local Authority in partnership with the provincial Tourism Directorate. The scheme includes retail and training opportunities.

Enquiries: Wesgro, Tygerberg Local Authority, Tourism Directorate (Department of Economic Affairs, Agriculture & Tourism, Western Cape).

5.3 General opportunities

- ? The development of multiple raw material banks established either independently or as satellite operations attached to an existing wholesaler (e.g. Metro Cash and Carry).
- ? The creation of a product-marketing agency representing groups of emerging crafters who produce complementary products.
- ? The development of an agency co-ordinating participation in major exhibitions and trade fairs (*craftart – designer and functional wares*).
- ? The establishment of “live” craft production centres in township tourism nodes.
- ? The development of comprehensive craft heritage routes in high density craft production areas across the Western Cape (visiting studio, galleries, participating in demonstrations etc.), including production of an illustrated guide to craft heritage routes in the Western Cape and creation of a website.
- ? The creation of production clusters in the beadwork and wirework sub-sectors servicing the top end of the market through limited editions of highly designed items.
- ? The development of different craft skills training modules.
- ? The creation of a product development clinic providing design services across a range of product sub-sectors.

6. CONFIDENCE INDICATORS

Employment opportunities and the creation of wealth underpin the emergence of a thriving regional and national economy.

As has become evident over the past decade, the visual arts, craft and design industries contribute to job creation and the economy both formally and informally. Recent developments in both the national and provincial arena indicate there is a new political awareness which recognises the contribution made by these cultural industries as integral to the development of human resources, an essential aspect of the national Poverty Relief Programme.

In the Western Cape, the multi-faceted activity around the craft sector is already an important means of income generation and this trend is likely to continue.

Despite certain short term challenges facing the industry in the province, exciting opportunities exist in the cultural diversity of the Western Cape, on-going consumer demand, sustained international interest in South Africa and a growing tourism industry.

7. KEY INDUSTRY CONTACTS (WESTERN CAPE)

Given the unconventional nature of the craft industry, the following brief contact list encompasses a variety of facets of the industry. A handful of important retail outlets, support service providers, useful officials and more have been included, each of whom will have access to further networks of their own.

7.1 National government

Department of Arts, Culture, Science & Technology
Contact: Joseph Mathe
Tel: 012 337 8505
Fax:
e-mail: KL51@dacst5.pwv.gov.za

Department of Trade & Industry
Contact: Sharon Maleka
Tel: 012 310 9376
Fax: 012 320 8157
e-mail: smaleka@dti.pwv.co.za

7.2 Provincial government

Department of Economic Affairs,
Agriculture & Tourism
Contact: Carol Nhlumayo (Director of Tourism)
Tel: 021 463 4165
Fax: 021 483 3018
e-mail: cnhlumayo@pawc.wcape.gov.zq

Department of Cultural Services
Contact: Melanie Mahona
Tel: 021 424 0410
Fax: 021 424 0457
e-mail mmahona@pawc.wcape.gov.za

7.3 Cape Metropolitan Area

Cape Metropolitan Tourism
Contact: Nombulelo Mkefa
Tel: 021 487 2718
Fax: 021 487 2977
e-mail: nmkefa@cmc.gov.za

Department of Social and Economic Development (Cape Metropolitan Council)
Social Development
Contact: Bathembu Lugulwana
Tel: 021 487 2874
Fax: 021 487 2758

e-mail: blugulwana@cmc.gov.za

Department of Social and Economic Development (Cape Metropolitan Council)
Economic Development
Contact: Jane Prinsloo
Tel: 021 487 2740
Fax: 021 487 2758
e-mail jprinsloo@cmc.gov.za

Department of Social and Economic Development (Cape Metropolitan Council)

Cape of Great Events (Management)
Contact: Pat Lennox
Tel: 021 487 2273
Fax: 021 487 2758
e-mail plennox@cmc.gov.za

7.4 Statutory bodies

National Arts Council
Contact: Tswelethini Maabane
Tel: 011 838 1383
Fax: 011 838 6363
e-mail albert@nac.org.za

Western Cape Cultural Commission
Contact: Secretary (to be appointed)
Tel: 021 424 0410
Fax: 021 424 0457
e-mail jpillai@pawc.cape.gov.za

Western Cape Tourism Board
Contact: Jurgens Schoeman
Tel: 021 914 4613
Fax: 021 914 4610
e-mail jurgens@capetourism.org

7.5 National Crafts Council of South Africa

National office
Contact: Eunice Mothetho (Secretary)
Tel: 011 646 4169
Fax: 011 646 4169
e-mail crafcsa@iafrica.com

Western Cape office
Contact: Sue Heathcock
Tel: 082 926 6169
Fax: 022 482 3074
e-mail suehea@worldonline.co.za

7.6 Training Institutions (design, some craft skills)

Community Arts Project
Contact: Graham Falken
Tel: 021 465 3689
Fax: 021 465 2008
e-mail cape@iafrica.com

Cape College
Contact: Sue Lunnon
Tel: 021 464 3822
Fax: 021 464 3854
e-mail info@capecollege.ac.za

Cape Technikon
Contact: Mel Hagen (Design School)
Tel: 021 460 3438
Fax: 021460 3704
e-mail hagenm@ctech.ac.za

Peninsula Technikon
Contact: Colin Daniels
Tel: 021 959 6086
Fax: 021 959 6357
e-mail danielsc@scinet.pentech.ac.za

Frank Joubert Art School
Contact: Jill Joubert
Tel: 021 674 1116
Fax: 021 683 1297
e-mail jill@frankie.wcape.school.za

Ruth Prowse Art School
Contact: Edwina Simons
Tel: 021 447 2492
Fax: 021 448 4393
e-mail ruthprow@iafrica.com

7.7 Important retailers

Indaba, KraalKraft and Fedics
Contact: Tony or Clive Kennet
Tel: 013 758 1229
Fax: 013 758 1228
e-mail cken@iafrica.com

Tigers Eye
Contact: Eric de Jager
Tel: 011 334 8883
Fax: 011 334 9810
e-mail ericdj@outofafrica-sa.com

Museum Connection
Contact: Catherine Le Sueur
Tel: 021 423 0177
Fax: 021 424 9726
e-mail amuze@iafrica.com

Montebello Design Centre (shop)
Contact: Tessa Graaff
Tel: 021 685 6445
Fax: 021 686 7403
e-mail None

Pan African Market
Contact: Michael Methvin
Tel: 021 424 2957
Fax: 021 424 2957
e-mail panafrica@mweb.co.za

Yellow Door
Contact: Sue Michelob
Tel: 021 465 4702
Fax: 021 465 4792
e-mail yeldoor@netactive.co.za

Natural World Store (Kirstenbosch)
Contact: Robert Greyling
Tel: 021 762 2510
Fax: 021 762 3395
e-mail natworld@mweb.co.za

Africa Nova
Contact: Nic Murgatroyd
Tel: 021 790 4454
Fax: 021 790 4452
e-mail christmasafrica-mwnicm@iafrica.com

African Image
Contact: Tracy Rushmere
Tel: 021 423 8385
Fax: 021 422 1575
e-mail info@african-image.co.za

Peter Visser Interiors
Contact: Kendal Warren
Tel: 021 422 2660
Fax: 021 422 1148
e-mail None

7.8 Important craft markets

There are many more craft markets in the Cape Metropolitan Area than are listed here. Phone the Cape Metropolitan Tourism or Western Cape Crafts Council for further information.

The Red Shed (V & A Waterfront)
Contact: Lorraine Bester
Tel: 021 419 2885
Fax: 021 419 2314
e-mail smallbusiness@waterfront.co.za

Khayelitsha Craft Market
Contact: Rachel Mash
Tel: 021 361 5246
Fax: 021 534 2963
e-mail None

Wilderness Craft Market (Garden Route)
Contact: Di Young
Tel: 044 343 2939
Fax: 044 343 2939
e-mail dianayoung@intercom.co.za

Hermanus Craft Market (Overberg)
Contact: Lydia Kemper
Tel: 028 313 0418
Fax: 028 312 1475
e-mail f.v.craftmarket@webmail.co.za

7.8.1 Craft markets attached to Festivals

Klein Karoo Kunstefees
Contact: Hermia Damons
Tel: 044 272 7771
Fax: 044 272 7773
e-mail karoofees@pixie.co.za

Nederburg Kysna Arts Experience
Contact: Picca de Bruin
Tel/Fax: 044 382 0875
e-mail nkae@imagnet.co.za

Stellenbosch Arts and Culture Festival
Contact: Nana Wagner
Tel/fax: 021 883 3891
e-mail None

Hermanus Whale Festival
Contact: Glynnis van Rooyen
Tel/Fax: 028 312 1785
Tel: 028 313 0928 (office)
e-mail festival@hermanus.co.za

Further information regarding regional markets or those attached to Festivals may be obtained from the Western Cape Tourism Board or the Crafts Council of the Western Cape.

7.9 Craft Producers

Craft producers can be sourced via the national or provincial offices of the National Crafts Council of South Africa, training institutions or certain of the retail outlets or craft markets. See details above.

7.10 Important publications

Cultural Industries Growth Strategy by the National Department of Arts, Culture, Science & Technology (1998).

Creative South Africa (executive summary of the C.I.G.S. document mentioned above) by the National Department of Arts, Culture, Science & Technology (1998).

Working in Harmony by Wesgro and the Cape Metropolitan Council (1999).

A Development Strategy for the Craft Industry by the Crafts Council of the Western Cape (1999).

The Craft Industry on the West Coast by the West Coast Investment Initiative (directory) (1999).

Audit of Craft Assets in the Western Cape by the Department of Economic Affairs, Agriculture and Tourism (Western Cape)(2000).

Guide to Craft Markets in the Cape Metropolitan Area (map) by Cape Metropolitan Tourism (2000).

CraftNews (Quarterly newsletter) by the National Crafts Council of South Africa.

8.0 Abbreviations

D.T.I	Department of Trade and Industry
D.A.C.S.T	Department of Arts, Culture, Science and Technology
N.C.C.S.A	National Crafts Council of South Africa
C.S.P	Craft Sector Partnership
C.I.G.S	Cultural Industries Growth Strategy
C.M.A	Cape Metropolitan Area
C.M.C	Cape Metropolitan Council