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STRATEGIES FOR CRAFT SECTOR GROWTH IN IRBID AND KARAK, JORDAN

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STRATEGIES FOR CRAFT SECTOR GROWTH IN KARAK AND IRBID, JORDAN

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INTRODUCTION

Our goal is that producer groups with whom we work in the Irbid and Karak regions will achieve financial stability and independence within three years that they will be able to operate through the profits of their production. The focus is to offer more intensive technical assistance at the start of these interventions and to mentor the producers through to success. Technical inputs and ongoing technical support will be the means to their gaining independence. All suggested interventions are market driven and private sector players are utilized as valued and normal links in the distribution chain.

A second goal is to enhance the crafts sector and help to generate vitality in a somewhat static environment.

This assignment's deliverables include developing a long-term strategy for craft sector success in the targeted regions, a repertoire of tourism specific products to be produced in these regions geared to specific producer groups and identification of regional themes. These deliverables will serve as the springboard to launch integrated interventions geared to achieve our overall goals.

The suggested strategy also includes creating market opportunities that have not been readily available to Jordanians. This access to markets will be possible through a different approach to product design and production. Local and less expensive materials will be used in a way that increases their perceived value, and this is done through design that is creative, practical, and stylish. Production methods will be refined to increase efficiency, and pricing and costing strategies will be honed to reflect the reality of the marketplace.

The strategy for sector growth presented here relies on a mentoring component for young designers who will work with producer groups and be mentored by international and local design experts.

“Shopping is a great way to experience Jordanian culture – and it can bring you closer to understanding what makes Amman tick than any other activity”
The Rough Guide to Jordan

EXECUTIVE SUMMARY

Crafts can be an important economic element within the tourism sector. Shopping is an integral part of the tourism experience and it is crucial that Jordanian producers establish a vital presence in the tourism market and gain a share of that market. Additionally, to ensure income for producers in light of the volatile nature of tourism, we are looking at other market opportunities as well.

The crafts sector in Jordan has enjoyed significant inputs for many years and has developed considerable expertise. The challenges that face the sector are significant but certainly not insurmountable. Through creative strategizing the sector can be positioned to be a produce a far greater economic impact on the lives of producers.

Currently the crafts sector in Jordan has many experienced designers who have spent years developing high-end market ready products, such as The Jordan River Foundation, Al-Burgan, JOHUD and others. In addition, many producers have access to viable production centers and equipment. And, there has been intense work done in creating semi-industrialization production for greater market access. Jordanian designers are highly educated, have experience working on the ground with producers, have developed sophisticated production systems, and have gained access to local and export markets, particularly in the Gulf region.

One challenge in the sector is that many products are very similar to each other, and designs are build upon each other while few seem to break out of the established aesthetic sensibility. Many local designers indicated that this is because they do not believe the market will accept entirely new product directions. Others indicated that as soon as they spend the time and energy on new creations they are copied by their competitors. Though we do not address these specific concerns in our strategy, it is definitely an unstated goal of this strategy to help Jordanian designers and producers move into more dynamic creative activity. Because Jordanian designers have a high level of sophistication we are certain that once the process begins and new ideas are introduced into the sector they will integrate the new designs and ideas into their work.

Additionally, because there has been significant inputs from international and Jordanian donors, the private sector in the crafts community is small. The proposed strategies seek to strengthen the handicrafts private sector and utilize private sector players as fully as possible. Suggested interventions are capacity building in nature and will not play a market role as subsidized market interventions. Formerly, worldwide, crafts projects have played subsidized market roles, and have not yielded the commercial independence for all players that is necessary for long-term sustainability.

A related challenge is a relentless commitment to the common local aesthetic sensibility, one that is fused with the general Gulf regional aesthetic. As this sensibility admires imported pricey textiles and ornate designs that require intense labor inputs, it results in overpriced products with a lower perceived value outside of the Gulf region. By using local materials and simplified designs we are looking to create collections of products that have a higher perceived value, that appeal more directly to the target market's sensibility and that can be sold both in the tourist and export markets at prices the markets can well absorb.

Probably the greatest challenge to the sector is the lack of a variety of raw materials. Though this is true, there is also an underutilization and a lack of creativity in using those materials

that do exist locally. The suggested product collections utilize by and large local materials and the Strategy includes future inputs that will aim specifically at investigating and utilizing these and other materials.

Finally, market access is probably the most complex challenge that will face the producer. In general the crafts sector lacks vitality. The tourist or souvenir shops sell low-end imported products. There are few other outlets at the tourist sites, and few opportunities for tourists to purchase Jordanian crafts. One initial suggested intervention is a consumer awareness program that includes a major advertising campaign to educate tourists and consumers about Jordanian made products. Our approach to marketing will be three tiered, first targeting local tourist markets, then targeting local and regional corporate markets and finally looking to the international export market.

Our target regions for production are Irbid and Karak. For each region we have developed a thematic approach to product development

- The overall themes for the Irbid region are “Mystery of the Olive,” “Pastoral Jordan” and Desert Pottery,” “Essence of Antiquity” and Sacred River Baskets
- For Karak they are the “Spirit of the Bedouin,” “Camel Bones,” “Rustic Textiles”

There are products related to these themes from each area, as well as other products.

The proposed strategy envisions growth of the crafts sector in these regions through new design opportunities, mentoring local designers to create new product lines and thereby expanding their aesthetic repertoire, increasing market opportunities both inside Jordan and abroad, increase production capacity of producers in planned increments, and train producers in using new production methods and materials.

STRATEGY FOR CRAFT SECTOR GROWTH

1. PRODUCT DESIGN

Product Design Strategy

The first step in any successful crafts project is to have products people want to buy at prices they are will to pay. For the tourism market, this is much more difficult to assess than for a general local market because the buyer population comes from many different cultures with very different aesthetic biases. For the most part tourists buy three types of products, inexpensive gift items for family, friends and co-workers, souvenirs for others or themselves that remind them of the sites (the first and second category can be one and the same) and finally, higher end products for themselves or gifts for loved ones.

- Crafts for the Tourist Market

Tourists want items that are easy to carry, and something that reflects the country but is still within their aesthetic sensibility. As most of the tourists in Jordan are from Europe, the European contemporary aesthetic must be kept in mind while designing products. Popular for tourists are ethnic or ethnic-like products, products with humor, “cute” products for children or adults, and products with symbols or meaningful sentiments. Smaller gift items sell best if under \$10, with an additional range of \$20. Additionally, for the higher products innate beauty, good quality workmanship, and unusual design (meaning something new to them) sells and the best price points for these items are between \$50 and \$100. There are few statistics on actual product purchases worldwide in tourism literature. This is because a great majority of purchases are in the informal sector. The data that is available reflects the general trends as stated above.

In addition to keeping in mind general tourists’ wants and concerns, we are also looking to design tourism products that can be easily amended for corporate and export markets. As new products are being made, costing and pricing issues will be taken into account for all market streams.

Many of the new product lines we are suggesting use local or locally available materials and existing skill sets, yet they take the visual identity in new directions. For example, the clay line uses clay from local sources with no glazes and not overt designs, but rather relies on the inherent value of the clay to express the feeling of the desert and the ruins.

The mechanism for introducing new product ideas to the producer groups will be through bringing in young designers just out of design school to mentor the producers in new products development and initial production. The program will both mentor the young designers, and they will in turn mentor the producers.

- Mentoring Young Designers

The first stage of the strategy is to utilize the talents of designers just out of design school to implement the production of prototypes. As fresh talent, they will be more able to use the design elements suggested here and take them to newer levels. They will work directly with producers in order to understand production limitations, identify hidden opportunities, and recognize costing and pricing constraints.

The young designers will be linked directly to an international consultant who will guide them in the marketability of new designs. For the most part this will be done via virtual mentoring with weekly on-line sessions.

In order for the producer groups to feel a sense of ownership about the products and designs, it is important for the young designer to work in a collaborative manner with the groups, particularly the master artisans in the groups, taking in their ideas and as much as possible incorporating them into the collections. For the groups to have a sense of ownership the work must feel like a partnership and the young designers should not feel a sense of “ownership” about their designs.

For the young designers, their work is capacity building, and their financial compensation is their reward. If in the future they would like to create, sell, and/or market their own designs, they can then enter the work as a private sector player.

The young designers will be responsible for

- Working with producer groups to create prototypes of the designs of the international consultant, making digital images of prototypes and previewing them with international mentor
 - Building the collections suggested by the international consultant and adding their own designs, and as much as possible integrating the designs of the local master artisans. Entirely new collection can also be generated. These new designs will be reviewed by their international mentor
 - Supervise the beginning stages of production, mentoring their producers in realizing the new products.
 - If working in skills not fully understood by the young consultant, such as weaving or pottery production, a local expert will be provided for technical mentoring in production techniques.
- Possible Ongoing Mentoring and Design Opportunities
 - Establish an ongoing Design Working Group (or Think-tank) after about a year into interventions, when new designers and master artisans are well on their way to achieving sales and success. Composed of expert Jordanian designers, newly graduated Jordanian designers and international designers.
 - Targeted competitions geared towards gaps in the market, such as products made with recycled materials.

Product Collections

- Product Collections

These collections are designed to keep production and labor costs down and to rely on market driven designs to increase perceived value. We would like to see lower cost products enter the market and capture a significant market share of tourism and be poised, once production capacity is built, for export.

In addition, we would like to see products that more thoroughly reflect the uniqueness of Jordan; the vastness and color subtleties of the desert; the ethnic identity of the Bedouin;

and the rustic feel of the Roman antiquities are just a few examples of directions product design can take to embrace the uniqueness of Jordan.

These collections are just a beginning to what can be done, and are to serve as springboards for continued product design and development.

Attached product pages show the full collections in color with specifications. Also attached is a list of generic products geared to the tourist market with size specifications.

Northern Region

○ Desert Pottery



- Uses local clay, can be purchased already mixed in unfired brick format from Qwara Ceramics.
- Requires no glazes, is rustic and reflects the feel of the desert
- Square shapes require no wheel and are made with hand formed clay slabs, with low intensity labor inputs.
- Suggested products in this line include small items easy for tourists to buy
- These products will be low cost and can be used in packaging for other products such as dried herbs.
- The production group for this collection needs to be identified. It will be in the North, in the Irbid region where traditional pottery production is still being done

○ Mangalé Embroidery Collection



- Uses small amount of embroidery as accent in contemporary designs keeping labor costs down
- Uses locally available textiles
- Collection includes nice upper end gift items as well as small gift items
- Retains the spirit of the Palestinian embroidery
- This collection will be done by the Rahoob group in Irbid.

Southern Region

○ The Spirit of the Bedouin Collection



- Readily available and recycled cotton will be used
- Simple sewing techniques employed
- Reflects the unique aesthetic of the Bedouin Nomads
- The products are easy to transport and include small gift items
- This collection will be done by Manshiet Abu Hamour in Karak

- Cute Kids Collection



- The aesthetic sensibility is traditional Bedouin
- Simple small embroidery figures added to solid fabric, results in low labor costs
- Complete use of local and easily available raw materials
- Lends itself to wide variety of products, including small gift items and high end gifts
- Can be used for gifts for all ages from infants to adults
- Will be produced by Ghor Al Safi in the Karak region

- Suggestions for other collections to be developed

Northern Region

- Essence of Antiquity Collection
 - Roman Walls - Made from Jordanian stones, in mosaic technique but to resemble ancient buildings, rather than mosaic images--will include frames, candle holders, wine caddies, and other utilitarian products to reflect the spirit of the roman ruins. To be produced by Sultan Soleman Rosan in Umm Qais.
 - Carved Stones – Stones will be carved into candle holders, home accessories, frames, etc. These will be whole stones (not mosaic as above). A variety of stones will be used, to include basalt. To be produced by Sultan Soleman Rosan in Umm Qais.
 - Paper Mache – Will include jewelry, napkin rings, bowls, coasters and other wearable and home accessories that will reflect the stones of the roman ruins, but done in paper maché, much lighter than stones for these products – to be made in the Irbid region
 - Soap – hand made soap – hewn rough to look like stones, and packaged to reflect the spirit of the ruins, to be done by Malka factory in Irbid
- Mystery of the Olive Collection
 - Olive wood carving - only small sizes of olive wood is available, so jewelry and small items such as salad servers, salt and pepper shakers, tea caddies, etc. will be designed for this collection, the wood can be inlaid with local copper. This collection will be made in the Irbid Region
 - Textiles - Embroidered textiles with olive branch designs- To be produced by Rahoob group in Irbid

- Pastoral Jordan –
 - Dried fruits slices to be transformed into Christmas Ornaments, used in packaging, and used in combination with other products. Pastoral Jordan will also include spices and herbs, and packaging and themes will be coordinated with the other lines. This will be done in the North.
 - Textiles - Appliqué and/or embroidered textiles with motifs of fruits of the region
- Sacred River Baskets – Baskets made from banana and sea grass from the shores of the Jordan River. These will be redesigned to give more prominence to creative and elegant forms, and the workmanship of what is already being produced will be refined. These will be made by Mkhaiba Producers in the Irbid region.

Southern Region

- Bedouin Tent Collection – The rustic woven wool of the Bedouin tents will be used in home accessory products that can capitalize on the rustic aspect of the material. Products will include frames and wall hangings. The weaving itself can be altered to create new products, such as adding reeds or other materials.
- Copper Collection – rough hewn bowls in various sizes, jewelry, salad servers, and a variety of home accessories will be designed. They will reflect the life style of the traditional Bedouin nomad
- Camel Bone Collection – Camel bones will be transformed to create jewelry and used to accent a variety of home accessories. These will be made in the Karak region
- Candles – They will be a cross cutting product, made to be included in many of the other collections, for example they can be packaged in the Desert Pottery vessels, they can be made to look like roman antiques, they can be imbued with herbs, etc. They will be produced in the Karak region.
- Healing Pillows Collection – Sands from the desert will be used for healing pillows. The pillows will be made from a variety of textiles that are either locally made or easily available. Embroidery or other ornamentation can be added, as well as herbal fragrance. These mini pillows will be packaged well, probably with other products such as the soap. They are meant to be heated in the oven or microwave and placed on the body, particularly parts that have aches, for a warming healing effect. Specialty pillows can be made with sayings, such as for “tummy aches” for children, or sore backs, necks and muscle aches.
- Dead Sea Stones – Stones from the Dead Sea can be made into jewelry, used in home accessories and other products.

Cross-Cutting Collections (All Regions)

- Christmas Ornaments – This will be a cross cutting collection, drawing on raw materials from all the different groups to create a variety of ornaments
 - Felt Collections – Felt is one of the most popular items in the international market. Currently it is being produced by JRF, but with limited usages. Felt can be imported from India or Nepal at reasonable prices and can be used as a raw material in many of the other collections, or new products as per region can be developed using felt as the raw material and the defining element of the collections.
 - Packaging Elements – Many opportunities exist to use local skills and materials to produce packaging elements for other industries
 - Products from recycled materials - Available recycled materials and possible usages needs to be investigated. Products made from recycled materials has a high perceived value worldwide and is actively sought after by international buyers.
- Suggestions for other products that may not be directly related to small-scale producer groups but nonetheless can realize sales. Packaging can be made by target producer groups
 - Henna Kits - Can be presented in two formats: a stencil that had henna on it already and the stencil is directly applied to the skin or stencils and henna powder that will be mixed and applied to the skin with the stencil as a resist
 - Perfume Samples – Small bottles of perfume with Arabic labels can be sold in sets. Packaging will be the more important part of this product, and it can be exotic and made by producer groups.
 - Ceramic glaze stencils – Arabic glaze stencils for ceramics can be sold to pottery companies in other countries

2. MARKETING STRATEGIES

Good products are nothing without access to viable markets. Once there are market-ready prototypes, this strategy suggests ways to help producers access various markets. This is a three-tiered strategy, the first tier being the local tourist markets. Then the local corporate market is addressed, and finally, the export market it targeted. The incremental stages of building market access also allows producers to build production capacity in an incremental manner.

The importance of multiple market streams cannot be stressed enough, especially as tourism is both a seasonal and volatile industry. It is difficult for small-scale local producers to sustain financial stability without selling to other markets as well to tourists.

- **FIRST TIER MARKETING** - The local tourist markets

One of the biggest challenges to producers and vendors selling to the tourist markets is the stronghold that tour agents have over itineraries. The itineraries for tourists are in large part determined by the gain in percentages from sales the agents require. They will stop only at shopping areas where they are guaranteed on an average 40% of the total product sales and where the shops are large enough to ensure large quantity purchases. It would take a massive and probably unenforceable action by the government to curb this practice.

We propose a strategy that educates tourists and encourages them to buy Jordanian made products. This education process will require a significant advertising campaign and a branding campaign.

- Educate Tourists/Branding Campaigns

The Tourism Education and Branding campaigns should be undertaken simultaneously and a system should be in place to ensure that the consumable advertising elements are rigorously restocked and distributed.

- Educating Tourists advertising campaign will include:
 - Many billboards around the country strategically placed to target tourists (3 year program)
 - Advertising on the sides of busses
 - Brochures and posters in hotels, restaurants, etc.
 - Full page ads in tour books, such as The Lonely Planet, The Rough Guide to Jordan and others in all relevant languages
- Branding Jordanian made products
 - “Truly Jordan” or another name can be used to brand products made in Jordan. There will be a stamp and logo that each product will carry to ensure its authenticity.
 - Producers and/or Market Reps will be encouraged to have hang-tags and other promotional materials that reinforce the Jordanian-made brand

If the Education Campaign is vigorous enough, it may well force the tour guide companies to take their clients to places that sell Jordanian-made brands. In turn, the tourist shops that sell imported products will want to carry the Jordan brand, and to place it in strategic locations in their retail outlets.

This effort will be directly linked to the business to business strategy described below – The “Truly Jordan” Display Unit marketing

- Marketing to Tourists

Few local market opportunities exist for producers to market their own products. If Jordan develops more vibrant local marketing opportunities, artisans might be able to sell enough of their own products to sustain their income. At this point, artisans would be well served to work with marketing agents who resell their products both within Jordan and internationally. To the extent possible producers should be encouraged to self market. And this strategy also looks to opportunities for business to business linkages between producers and market agents, and later, market agents to international markets.

- Direct Retail Sales - Producers can self-market to hotel gift shops and other retail outlets.
- Retail Festivals and Fairs - Producers should be encouraged to participate in local festivals and fairs, such as the Jerash Festival and the open air market in Amman.
- Market Representative – A private sector partnership between producer groups and a market agent would well serve the producer and should definitely be encouraged.

- “Truly Jordan” free standing Display Unit – Private sector initiative perhaps to be initially supported by SABEQ - Building 3 – 4 models of a display unit appropriate to different needs of different retail outlets. The private sector entrepreneur who takes on this project will be responsible for selling the idea to shop owners, managing the units and keeping them stocked, ordering products from producer groups, quality control and financial management. Khalil Burgan of Al Burgan Handicrafts would be an ideal candidate and expressed interest in the idea. If successful, this project may grow into a series of “Truly Jordan” shops. (example below)



- Market Linkages with Tour Companies - Tour companies can market directly to their clients on their tour busses, or on their websites. A Display Unit can be designed specifically for Tour Busses
 - Establishing High End Shops inside Museums and Sites – Working the Ministries to establish private sector boutiques within museums and sites – (Much like the Romeo Group Restaurant at Umm Qais) Bringing in an experienced private sector boutiquier who will run highly professional museum shops, modeled after shops in the US and Europe. This way locally produced crafts and art can be sold without the percentage going to a guide. To convince the Ministry of the benefit of this kind of shop, reports of statistics of how shops benefit museums worldwide can be used, perhaps a study trip would be advised.
 - Tourism Trade Show - This can include more than just crafts, and can include other tourism related products and services – A “to the trade only” fair where producers can display their new work for potential buyers in the tourism industry. The difficulty for the village crafts producers is that many shop owners won’t deal with the challenges of purchasing direct.
 - Developing other festivals and fairs where producers can sell direct.
- SECOND TIER MARKETS – Corporate sales in Jordan

Second Tier Markets are the opportunities locally that are outside the tourism sector. These markets will be larger scale orders, though not enormous, and will be a

capacity building bridge to the export market prospects. It is important that production capacity is built incrementally, and reaching second tier markets is an ideal way to do so.

- Corporate gifts – This could be an opportunity to capture ongoing, large sales for the groups. The private sector marketing rep (or the “Truly Jordan” entrepreneur) could be the liaison for this initiative. SABEQ can offer support in helping to design products specific for the needs of the corporation.
- Packaging – Textiles, clay, wood, baskets all can be elements in packaging for companies. Small to medium businesses packaging needs can be assessed and compared to skills that exist in target producer groups. SABEQ can offer support in helping design packaging products specific to the companies’ needs.
- Corporate or Business Usage - Such as placemats, napkins or saltshakers for restaurants or hotels. This option can provide a huge opportunity as many of these products have a relatively short life and need to be reordered once or twice during the year. SABEQ can offer product development support specific to the needs of the target clients.

▪ THIRD TIER MARKETS – Export Sales

Wholesale export markets often prove to be the most sustainable, and offer their own challenges to producers and vendors. **Export sales in the region** is a good first option, then looking to smaller wholesale importers in Europe or the US would be the second step. Accessing the larger wholesale buyers in the US may or may not be feasible, but it certainly will not be in the shorter term. Building production capacity is essential and usually working first with smaller wholesale importers is the best way to enter to wholesale market. These smaller importers are more sensitive to issues facing producers and will wait to promote their products to larger buyers until they are ready. Often, a smaller scale importer will have access to larger markets and it is often a good way to move into those markets in an incremental manner.

Once there are well designed products, production capacity is improved and has the ability to expand, and pricing can be set with volume as a goal, then we can begin to market products internationally. Most probably there will need to be some product design inputs for the target markets, but there may well be enough products that are ready to meet that market.

Our goal is that we can begin looking to the wholesale export market within one and a half years of direct interventions, and perhaps sooner.

Following is an outline of the proposed marketing suggestions for wholesale export sales. As we move closer to being export ready, this strategy should be re-analyzed and honed considering the capacity on the ground.

- Business Linkages -- The wholesale buyer purchases from an export agent that consolidates products from producers around the country. These agents should be private sector players and we should encourage and support business to business relationships in both forward and backward linkages: Producer to Exporter, Exporter to Importer.
- Export Agent – The export agent is key in this chain of distribution. There can be more than one agent in this Business Linkage component. The “Truly Jordan” rep can be one of those agents.
- Support Services for the Business Linkages program:

- Training on realities wholesale markets (See Training section below) for export agents and entrepreneurial leaders from the production workshops
- Gulf regional market access – Assist agents in accessing client resources in the Gulf region – to include trade and retail show visits, hosting potential buyers and web access strategies
- Global Market Research Tours – Visits to wholesale trade shows in viable markets. (can include Paris - Maison et Objet, Germany – Tendence and Ambiente, New York – International Gift Fair, Los Angeles – Sources, etc) to see what sells at what price and at what cost to the exhibitor.
- Buyer Tours to Jordan - Sponsor potential client visits to Jordan. Can offer potential buyers a trip to Jordan for 3-4 days (for example, can pay for 50% of expenses) Potential buyers will need to be researched and identified.
- Website support – Help agents with training and consultation on setting up a workable website to access wholesale markets. Web advertising workshops and training will be a part of this. Websites can be the most efficient and lucrative marketing opportunity if handled professionally.

3. TRAINING AND LATERAL SUPPORT COMPONENTS

In addition to the above program suggestions other cross cutting interventions can be undertaken.

TRAINING OPPORTUNITIES

In addition to the mentoring elements, training sessions can also be offered. Training subjects can include, but not limited to:

- Merchandising – for retail and for stands for fairs and festivals
- Print Merchandising and Packaging – Hang tags, posters and signs, brochures, and packaging issues
- Quality Control – methods of maintaining quality control standards, and international quality control standards
- Costing and Pricing - Particularly for the international market, for agents and managers of production facilities
- Methods for managing production – systems for efficiency and reducing costs
- Customer Service – to the retail and wholesale markets. How to gain a competitive edge through good customer service

LINKAGES TO KNOWLEDGE CENTERS

Knowledge Centers can offer support to producers and market agents through training and linking opportunities. Suggested opportunities include:

- Raw Material search – raw material needs can be posted on the intranet
- Training in digital imaging of products
- Artisan linkage - linking artisan groups with shared skills needs
- Resource Research Training and Web Usage – Producers can be training in searching the web for product trends, international clients, international pricing, etc.

APPENDICES

Appendix 1 – List of Sites Visited

Appendix 2 – Product Design Catalog

Appendix 3 – Time Line

Sustainable Achievement of Business Expansion and Quality
Salem Center, Sequleyah Street
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