

**A PRELIMINARY ASSESSMENT OF
MALAWI'S WOODCARVING INDUSTRY**

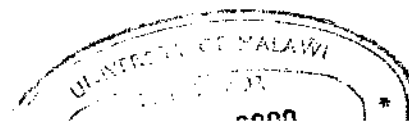
**A TRAFFIC East/Southern Africa REPORT
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INTRODUCTION

Africa has long held a reputation for producing some of the world's most beautiful and distinct woodcarvings. Certain ethnic groups such as the Yoruba of Nigeria and the Makonde of Tanzania, are well-known for their traditional sculptures which represent some of the finest artwork on the continent. While these artistic traditions are centuries old, in recent years other ethnic groups have adopted the practice of woodcarving as a means to earn income. The development of woodcarving as a commercial enterprise emerged in the 20th century, with the most successful and notable birth of the industry being among the Kamba in southeastern Kenya (Elkan, 1958). Other countries and ethnic groups have also recognized the lucrative nature of commercial woodcarving production. Success is primarily due to increased tourist arrivals, but also to efforts aimed at introducing African carvings to global markets. In the east and southern African region, woodcarving industries are now thriving in Kenya, Malawi, South Africa, Tanzania, Zimbabwe, and to a lesser extent in Mozambique and Namibia (CACA and Harrison, 1995; Marshall, 1995; Matose *et al.*, 1997; Steenkamp, 1999; Troughear, 1987). Surveys have been carried out to assess the trade and industry in several of these countries, and these have served to elucidate the dynamics of harvest, woodcarving production and sale, and also to attempt to present solutions to the ever-increasing problem of a declining resource base.

In Malawi, the reality of agricultural conversion and land degradation is possibly the most pronounced in the region. Yet, a thriving woodcarving industry exists, with thousands of woodcarvings offered on sale in tourist centers and craft shops throughout the country, and significant quantities produced for export. The threat of forest destruction and its resultant impact on individual tree species has become a national concern, yet at the same time, little attention has focused on the woodcarving industry and its implications for the country's forest resources. In response to these two observations, large-scale forest degradation and a persistent woodcarving industry, in 1998 TRAFFIC commenced research to understand the dynamics of Malawi's woodcarving industry and to develop recommendations that would lead to improved conservation and sustainable use of the woodcarving resource.

METHODS

This assessment of Malawi's woodcarving industry was carried out between October 1998 and January 2000. Activities undertaken included a review of available literature and official trade data, fieldwork, analysis and compilation of data, and production of this final report. Specific objectives of this project are as follows:

- to identify the species used in Malawi's woodcarving industry;
- to ascertain which species are used to produce different types of woodcarvings;
- to ascertain reasons for preference for certain species;
- to document perceptions of availability of woodcarving species in selected areas;
- to identify the source areas of the species used to produce woodcarvings;
- to document trade patterns from source areas to woodcarving sites;
- to compile data on the conservation status of the principal woodcarving species;
- to document the volume of domestic and international trade in woodcarvings;
- to ascertain the value of Malawi's woodcarving trade;
- to assess the impact of the woodcarving trade on Malawi's forests and woodlands; and
- to develop recommendations aimed at promoting the sustainable use of Malawi's forest resources.

Literature/Data Review: A general literature search was conducted, and trade data were collected. Key institutions consulted for advice and information include: Department of Forestry; Department of National Parks and Wildlife; Environmental Affairs (NATURE Programme); Forestry Research Institute of Malawi (FRIM); National Herbarium and Botanic Gardens of Malawi; Customs and Excise; National Statistical Office (NSO); Malawi Archives; Center for Social Research (CSR); Malawi Special Collection at Chancellor College; and the Mua Mission Craft Center.

Fieldwork: Field visits were conducted at 32 woodcarving sites in nine districts, from October to December 1998. Field activities were concentrated in the central and southern regions, due to the prevalence of woodcarving production and retail centers. The northern region was not investigated during this survey due to low population density, lack of a wood carving tradition in the north, and reports by woodcarvers and other knowledgeable individuals indicating minimal woodcarving activity in the area. A questionnaire was developed, and interviews

were conducted with a total of 300 individuals. Interviewees were questioned individually or occasionally in groups using participatory interview methods. Supplementary field visits were carried out in January 2000.

Compilation and Analysis of Information: This final phase entailed review of data, and further consultation with knowledgeable institutions and individuals to fully assess the woodcarving industry and its impact on Malawi's natural resources. Survey results were used to develop recommendations to ensure the long-term viability of both the woodcarving resource and the industry.

BACKGROUND

Malawi has a total land area of 118,219 km², of which 24,228 km² comprises Lake Malawi and a further 1,788 km² other inland water bodies. The country is long and narrow, and occupies the southern part of the East African Rift Valley system lying between latitudes 9° and 17° south and longitudes 33° and 36° east. Its neighbors are Mozambique to the south and east, Zambia to the west, and Tanzania to the east and north. Malawi's topography and climate vary significantly from north to south, with altitudes ranging from near sea level in the lower Shire Valley to a maximum of 3,050 meters on Mt. Mulanje. A plateau occurs above the western side of the Rift Valley, with altitudes ranging from 1,000 to 1,300 meters. The northern part of the country is characterized by mountainous terrain, while the central and southern parts are typified by highly modified miombo woodlands and intensive cultivation (Simons and Chirambo, 1991).

Malawi is one of the poorest countries in the world, with the per capita income estimated at USD 166 in 1998 (Anon., 1998a). The human population is thought to be approximately 10.8 million growing at an annual rate of 3.2 percent per year, with the populations in the three administrative regions of the country being 5.4 million in the Southern Region, 4.2 million in the Central Region, and 1.2 million in the Northern Region (Anon., 1997; Anon., 1998b). Malawi is one of the most densely populated countries in Africa, with an overall ratio of 110 persons per km², and 200 per km² of arable land; approximately 87 percent of the population lives in the rural areas (Anon., 1997).

Malawi is almost totally dependent on agriculture, which provides income and employment for over 85 percent of the population (Anon., 1998b). A wide range of food crops are produced, including the main dietary staple maize, groundnuts, rice and cassava. Cash crops such as tea, coffee, tobacco and sugar grown by both estates and small holders, are primarily bound for export. Tobacco accounts for 90 percent of the country's foreign exchange earnings (Anon., 1998a). Approximately 42 percent of Malawi's gross domestic product (GDP) can be accounted for by smallholder production of subsistence food crops such as maize. Other sectors, i.e. industry, account for on average 27 percent, while the service sector accounts for 31 percent (Anon., 1998c). Fish from Lake Malawi are an important source of protein and income for the lakeshore communities (S. Munthali, World Bank Transboundary Projects Officer, *in litt.* to R. Barnett, TRAFFIC East/Southern Africa, 1998).

FOREST RESOURCES

Originally widespread, forests have suffered considerably due to clearance for agriculture, and harvest for fuelwood and other industrial activities. The total land area under forest cover is thought to be about 38% of the country and consists of national parks and game reserves covering 11.6% of the land area, forest reserves and protected hill slopes covering approximately 10%, and natural woodland on customary land covering the remaining 17%. These forests provide protection for soils and water catchments, and serve as a source of timber for construction and industrial use. Approximately 90% of the country's energy needs are met by natural forests, plantations and trees on farms (Anon., 1996a).

The reduction in the forest estate is in part attributed to Malawi's past forest policy, in which forests were largely viewed as a hindrance to agriculture (Lowore, 1993). Investment in management was minimal and comprised mainly protection against illegal tree felling, and fire management. Gazetted forests were regarded as government property and off-limits, and this situation resulted in large-scale deforestation on customary land, and inefficient use of government forests (Lowore, 1993). Estimates of the rate of decline in Malawi's forest cover range from 1.0 to 2.8 percent per year (Anon., 1996a), to 3.5% in areas experiencing more rapid deforestation (S. Munthali, World Bank Transboundary Projects Officer, *in litt.* to R. Barnett, TRAFFIC East/Southern Africa, 1998). Specific causes of deforestation have been recorded as overgrazing, agricultural expansion, fuelwood collection, commercial logging, and large-scale use of fuelwood for industrial activities such as curing tobacco, making bricks and burning

lime (Anon., 1996a). In some areas, land degradation is so intense that the only remaining vegetation occurs on sacred burial sites of no more than one hectare in size (Munthali, 1993).

Map 1
The Republic of Malawi



Forests in Malawi can be classified according to the following four categories of land ownership: private land; government-owned gazetted forests; government forests occurring within national parks and game reserves; and forests on customary land (held by the President as a trustee for local communities). These categories and the forests they contain are described below.

i. Forests on Private Land

Owners of private land control both natural and plantation forest. The natural forests represent the remainder of the miombo forests that formerly blanketed the entire country. Exploitation and management are largely the responsibility of the landlord. It has been argued by some that natural forests found on lease and freehold land are inadequately managed (Anon., 1998c).

ii. Gazetted Forests

There are over 70 government-owned gazetted forests, containing approximately 0.73 million ha of indigenous forest (Luhanga, 1995). Managed by the Forestry Department, these reserves are mainly found on hills and mountains and serve to protect watershed and catchment areas and other crucial water sources from soil erosion and general environmental degradation. Gazetted forests are in general under intense pressure from nearby local communities who are in need of additional lands for agriculture and other purposes. While these gazetted forest areas host a range of forest and woodland types, they also harbour over half of Malawi's plantation forests. Current estimates of plantations within gazetted forests are 1.1 million ha, consisting mostly of Pine, *Pinus patula* and *Eucalyptus* spp. (Luhanga, 1995).

iii. National Parks and Wildlife Reserves

Forest resources found in National Parks and Wildlife Reserves are managed by the Ministry of Tourism, National Parks and Wildlife, and comprise an estimated 1.09 million ha (Luhanga, 1995).

iv. Forests on Customary Land

Authority for customary land is vested in the President, who acts as a trustee for and on behalf of communities. Forest resources found on customary land holdings cover a total estimated land area of about 1.7 million ha (J. Luhanga, Department of Forestry, pers. comm., 2000). Management of these forests is undertaken by local authorities. In general, forests occurring on customary land are under extreme pressure; the land is owned communally, and its forests are generally treated as open access resources (Luhanga, 1994). An estimated 1.0 million ha of plantation forest occurs on customary land (Luhanga, 1995).

The Department of Forestry, under the Ministry of Forestry, Fisheries and Environmental Affairs, has the mandate to protect and manage the country's forest resources, and to administer and implement the *Forestry Act, 1997*. The Department of National Parks and Wildlife, local traditional leaders, or private forest managers control the forest resources that fall outside the direct mandate of the Department of Forestry.

Undoubtedly, forest resources in Malawi have come under immense pressure during this century, due to the uncontrolled rate of exploitation of indigenous forests, in particular outside of protected areas. The unsustainable rate of harvest is of great concern, with insufficient wood resources a problem that is increasingly apparent to those involved in the woodcarving industry.

THE WOODCARVING INDUSTRY IN MALAWI

Historical overview

Malawi's woodcarving tradition lies primarily in the area of ceremonial masks, which were made by the Chewa tribe for use during certain cultural events, e.g. Nyau dancing. Once used, these masks are destroyed, although in recent years masks have sometimes been kept for a period of ten to 15 years. These masks are created from perishable materials, but from wood as well. According to tradition, women are forbidden to view the masks, and consequently masks are hidden from sight. In the past, masks in storage were often attacked by insects and rodents (C. Boucher, Mua Mission Craft Center, pers. comm., 2000; G. Koebler, Wildlife Action Group, pers. comm., 2000). The tradition of woodcarving in Malawi is therefore relatively undocumented, although efforts are underway to collect information and produce a cultural record of this practice, in particular with regard to ceremonial masks and implements (C. Boucher, Mua Mission Craft Center, pers. comm., 2000).

Commercial woodcarving is likely to have started in the 1920s, when Muslims from Malawi went to Tanzania for religious training. The Tanzanian tradition of carving, especially among the Makonde people famous for their elaborate carvings of human figures and scenes of daily life, is centuries old. Exposure to this work, and the beautiful black wood from which it was carved (*Dalbergia melanoxylon*), was enough to bring the tradition back to Malawi. It is thought that woodcarving first gained a foothold in Malawi in Liwonde and Chingale (C. Boucher, Mua Mission Craft Center, pers. comm., 2000). By the 1960s, carving was still in its infancy in Malawi, yet one could purchase genuine Makonde carvings in Blantyre. At that time efforts commenced to train Malawian carvers to copy Makonde carvings, and a workshop was established in Blantyre to produce Makonde replicas for sale. In 1976, the Mua Mission's Craft Center was established, with the aim of promoting art rather than mass-produced carvings; the main items produced were religious carvings for churches, and therefore these carvings remained in the country. Malawi's most famous carved item, the chief's chair (also known as the safari chair or fold-up chair), is not in actuality a Malawian tradition, rather, production of these chairs emerged in the late 1970s. It is thought that the chief's chair, with its elaborately carved back, arose as a potentially lucrative tourist souvenir. In the past, chairs were generally scarce in Malawian villages, and the name "chief's chair" may have been coined because it was usually only the chief who had one (C. Boucher, Mua Mission Craft Center, pers. comm., 2000).

Photo 1

Louisa Sangalakula talking to woodcarvers at the Mua Mission Craft Center



Credit: Nina Marshall

In the early 1980s, the Government of Malawi took an interest in the woodcarving industry, through the efforts of the Malawi Export Promotion Council (MEPC). A survey of the country's handicraft production was undertaken with the aim of assessing and developing the craft industry and in particular the export markets (McKendry, 1981a, 1981b, 1981c; McKendry, 1983). These studies identified craft producers, recorded production techniques and capacity, assessed quality and export potential, and gauged woodcarver skill levels. It was found that most woodcarving was carried out with primitive techniques, with only one power lathe observed at a workshop in Thyolo. The approximate number of woodcarvers observed in the Southern region was 100 in Blantyre, 52 in Zomba, 47 in Machinga, 150 in Thyolo and 132 in Mangochi, although it is likely that numerous other carvers were active in rural areas (McKendry, 1981c). Most woodcarvings were sold locally, with problems in ordering, collection, quality control and the unreliability of producers culminating in

poor infrastructure and subsequent exporting difficulties. Exports during the early 1980s were small and only two destinations were documented, South Africa and USA (McKendry, 1983).

The work of the MEPC was geared toward industry promotion and development, and little mention was made of the status of the availability of raw material. Only once was it noted that over-harvesting of trees was taking place, and this was in the context of "cutting more than allowed on the permit" with reference to Phingo *Dalbergia melanoxylon* (McKendry, 1981c). It is very possible that at the time of this research, problems of resource declines and forest degradation were not immediately evident, and supply issues had not yet surfaced in Malawi.

The industry today: Malawi's woodcarvers

Woodcarving is relatively ubiquitous in Malawi. Woodcarvers are present in most tourist centers and are well-positioned along tourist and transit routes to display and sell their wares. For the most part, all Malawian woodcarvers are male; no women woodcarvers were identified during this survey, nor were any stall vendors female. Occasionally a woman might be employed to sand or polish a carving, but this is extremely rare and the task is usually carried out by apprentices (J.K. Banda, Mua Mission Craft Center, pers. comm., 2000). The exception is up-market curio shops, which often have female salespersons. The ethnicity of woodcarvers varies from region to region, with many different ethnic groups working in the industry, although there is a prevalence of Yao people, due to their tradition of involvement in trading activities. Most woodcarvers both produce and sell their wares, although some purchase semi-finished products and polish these at their vending stalls, and others operate exclusively on the vending side of the business.

The majority of woodcarvers interviewed during this survey regard the woodcarving profession as a long-term employment option. Out of 271 people queried about number of years in the business, 203 stated that they had been involved for over five years, while 50 said that they had been in the business for two to four years, and only 18 were new to the profession, having taken it up for less than one year. Carvers working near their villages stated that woodcarving was undertaken when no other activities were required, for example, planting and harvesting of crops, and woodcarving was regarded as a means to earn extra income. Thus, woodcarving allows people to earn income in areas where few options exist for formal or other employment, and is undertaken when agricultural work is not needed. Younger woodcarvers and vendors, on the other hand, had entered the business due to lack of other employment options. Most of the individuals in this category were working away from their home areas, and were situated in favorable vending locations, for example, where tourists might visit. These individuals had taken up woodcarving solely as a means to earn a living, and stated that the income was unsatisfactory, and that they would much prefer to move on to a different profession if the opportunity arose.

During this survey it has not been possible to document the number of individuals involved in the woodcarving industry, due to the lack of organization among the woodcarvers themselves, and the scattered nature of the many curio workshops and carving sites around the country. During interviews it was found that some of the largest groups of carvers and vendors are operating in the following locations: Mua Mission, > 100; Chub Makokola (Mangochi), 58; Blantyre People's Trading Center (PTC), > 500; Senga Bay (Salima), 80; Liwonde, ~ 200; and Lilongwe, > 120. These numbers omit the many curio shops of various sizes, and the employees that they may have in workshops. Further, it is thought that much woodcarving takes place in rural areas, with semi-finished carvings brought to vending sites for further finishing and sale. Over 1,200 carver-vendors were documented during this survey, and this figure is likely to be a gross underestimate of those involved in the industry; no suppliers of wood have been quantified, nor have the number of family members reliant on the woodcarving earnings. It is thought that number of woodcarvers and vendors directly involved in the industry could easily be as high as 5,000.

Structure of the industry

Woodcarvers operate largely on an individual basis, which is in contrast to a number of other countries such as Kenya, where woodcarvers have formed co-operatives to both procure wood supplies and sell their woodcarvings. The need for an association to both collect and export handicrafts has been recognized by the Small Enterprise Development Organization (SEDOM) and the Malawi Export Promotion Council (MEPC), but no action has yet been taken (Anon., 1995). Apparently, some attempts have been made to bring the woodcarvers together, in particular to teach marketing skills, yet these efforts have not been successful because competition and jealousy have precluded collaboration and cooperation (J. Luhanga, Department of Forestry, pers. comm., 2000). During this survey, however, it was found that there is considerable interest in setting up co-operatives and associations, in

particular to increase marketing skills and sales opportunities, and some small associations do exist. For example, woodcarvers operating in the vicinity of the Club Makokola have formed a loose organization, Zopanga-panga Village, to co-operate on obtaining wood supplies and seeking export markets. This largely informal association has about 60 members. No formal co-operatives for woodcarvers were identified during this survey.

On the vending side, several associations exist in Malawi. In Blantyre, the People's Trading Center Vendors Association operates to facilitate vending at a designated site outside of the PTC supermarket. The association has approximately 500 members who sell individually, with the benefit of membership being that they are able to acquire vending certificates from the City Council and are able to sell at the PTC site, which is a particularly strategic location. A similar branch of the PTC Curio Vendors Association operates in Lilongwe.

Photo 2

Roadside stalls at Senga Bay, Salima District



Credit: Nina Marshall

Woodcarving and vending associations are, however, few in number, and for the most part woodcarvers operate individually, producing their own carvings, and either selling them themselves, or selling them to curio shops in the country's urban areas. Some curio shops do have workshops set up to produce sufficient supplies for local sale and export. There are three large workshops operating in Malawi, with one additional large-scale workshop recently closed after several decades in operation; figures for total exports from these workshops are unavailable (F. Nyirenda, Malawi Export Promotion Council, pers. comm., 2000). Numerous small-scale handicraft shops and workshops also exist, and although none are formally exporting woodcarvings at present, seven have the potential to do so in the future (F. Nyirenda, Malawi Export Promotion Council, pers. comm., 2000; Anon., 1999a).

Species used in the Malawi woodcarving industry

Malawi's woodcarving industry is dominated by two species, Phingo *Dalbergia melanoxylon* and Nkolong' onjo *Combretum imberbe*, although other species appear depending on the region. A total of 22 species were found to be used for woodcarvings, and the figure could be higher if one takes into consideration that several species of *Albizia* are used, and additional area-specific species may not have been identified during this survey. Many species, however, were found to be used only rarely. For example, Tea *Camellia sinensis* was found only in

Zomba, where it is being used on an experimental basis by a single workshop. All species documented in trade are listed in Table 1.

Table 1
Tree species used in Malawi's woodcarving industry

SCIENTIFIC NAME	VERNACULAR NAMES	COMMENTS
<i>Acacia nigrescens</i>	Nkunku, Nkungu	Dark brown heartwood, close-grained, difficult to work.
<i>Azela quanzensis</i>	Msambafumu	Dark to orange-colored wood, extremely durable, heavy and insect resistant.
<i>Albizia</i> spp.	Mtangatanga, Nsenjere	Straight-grained wood, easy to work, polishes well.
<i>Burkea africana</i>	Mkaiati	Wood is pale yellow to reddish-brown, hard, heavy; susceptible to insects.
<i>Camellia sinensis</i>	Tea	Light wood, nice grain.
<i>Colophospermum mopane</i>	Tsanya	Wood is dark reddish-brown to black, hard, durable and heavy.
<i>Combretum imberbe</i>	Nangali, Nkolong'onjo, Nsinbiti, Mkotamo	Dark heartwood is heavy and hard, difficult to work, best used for ornaments.
<i>Dalbergia melanoxylon</i>	Phingo, Mpingo	Light sapwood, heartwood is dark purple to black, heavy, hard, close-grained.
<i>Eucalyptus</i> spp.	Eucalyptus	Reddish wood; exotic planted widely in plantations; invasive species.
<i>Gmelina arborea</i>	Malaina	Pale yellow wood, easy to work, polishes well; this species is an Asian exotic.
<i>Jacaranda mimosifolia</i>	Jacaranda	Pale light-colored wood, light weight; a widely planted American exotic.
<i>Julbernardia paniculata</i>	Ntondo	
<i>Khaya anthotheca</i>	Mbawa, Muwawa	Wood is reddish-brown, hard, insect resistant; easy to work and polishes well.
<i>Kirkia acuminata</i>	Ntunduwa, Ntungunduwa, Mtumbu	The wood is yellowish-brown, soft and light; but difficult to work due to silica crystals; polishes well.
<i>Newtonia buchananii</i>	Mkweranyani	Usually found in high altitude areas.
<i>Pericopsis angolensis</i>	Mwanga	Close-grained and fine, a general purpose timber.
<i>Pterocarpus angolensis</i>	Mlombwa	Orange to reddish-brown heartwood, durable, insect resistant, easily worked and polishes well.
<i>Pterocarpus rotundifolius</i>	Mbalitsa	Wood is light-coloured with an attractive grain.
<i>Swartzia madagascarensis</i>	Chinyenye	Wood is reddish-brown and heartwood may be purplish-black, durable, insect resistant.
<i>Terminalia sericea</i>	Naphini	Wood is yellow and hard, a general purpose timber.
<i>Toona ciliata</i>	Senderela	An exotic from Asia, planted extensively as a shade tree; wood is reddish, close-grained, may crack and doesn't polish that well.
<i>Widdringtonia whytei</i>	Cedar, Mulanje Cedar	Reddish-brown wood, heavy.

Note: For additional vernacular names in the other languages of Malawi, see Binns (1972).

Note: Two additional species, Katota and Mchelenge, were not identified.

Source: Binns, 1972; Chudnoff, 1984; Palgrave, 1977; TRAFFIC survey data.

Species chosen for woodcarving are selected primarily for their color, hardness, weight and finishing quality. Most of the species listed in Table 1 are dark red to deep brown or black, and the majority are heavy and durable woods, renowned for being quality timber species. The undisputed favorites are *Dalbergia melanoxylon*, *Combretum imberbe*, and *Pericopsis angolensis*. Three of the species are exotics, *Camellia sinensis*, *Gmelina arborea* and *Toona ciliata*. Neither *Gmelina arborea* nor *Toona ciliata* receives much praise from woodcarvers, but use is nevertheless increasing as supplies of indigenous hardwoods become more expensive and difficult to obtain. *Toona ciliata* has been recorded as used for making doors, coffins, tables, benches and bridges (Coote *et al.*, 1993), and *Gmelina arborea* is planted extensively in woodlots and is used for making the board game called *bawo*. It is interesting to note that elsewhere in the region, for example in Kenya, different exotics have become prevalent among woodcarvers. Of note are Mango *Mangifera indica* and Neem *Azadirachta indica*, both of which are acceptable timbers which are gaining popularity in Kenya, largely because of lack of indigenous raw material and efforts to promote these species as acceptable alternatives (Anon., 1999b). During this survey it was found that woodcarvers had never considered using Mango or Neem for carving. While it is virtually impossible to look across the landscape without seeing a Mango tree, Neem is less widely planted and woodcarvers have never considered it as a source of timber, although its value for medical purposes is well-known.

Table 2 illustrates the regional variation in use of woodcarving species in Malawi. While *Dalbergia melanoxylon*, *Combretum imberbe* and *Pericopsis angolensis* are popular in all districts, as are *Kirkia acuminata* and *Pterocarpus angolensis*, it is evident that certain species are only used in a few districts, and some species such as *Pterocarpus angolensis* are used primarily in a single district. Widespread use of *Dalbergia melanoxylon* and *Combretum imberbe* is attributed to the quality of the timber, as well as the perception that tourists will not buy anything else. When carvers were questioned about the possibility of using alternative species, this suggestion was often met with

a laugh, and the comment that such carvings would never be sold. Commercial buyers and tourists request "ebony" and "mahogany", and as such the dark brown/black wood of *Dalbergia* and *Combretum* are in demand, as is the reddish wood of *Pericopsis angolensis*. Also popular are the boxes and chests made from Mulanje Cedar *Widdringtonia whytei*, which has a rose-colored, relatively heavy wood. In general, tourists look for color and weight, and avoid purchasing light weight and light colored woodcarvings.

Table 2
Number of people reporting use of species, by District, 1998

SPECIES	Balaka	Chikwawa	Dedza	Lilongwe	Machinga	Mangochi	Mwanza	Salima	Zomba
<i>Acacia nigrescens</i>							29		
<i>Azela quanzensis</i>			3						
<i>Albizia</i> spp.		1	46			1		4	
<i>Burkea africana</i>			1		1		1	28	
<i>Camellia sinensis</i>									1
<i>Colophospermum mopane</i>	2	2	4	7		11	6	32	1
<i>Combretum imberbe</i>	7	31		19	3	14	102	43	4
<i>Dalbergia melanoxylon</i>	7	10	15	21		21	74	44	4
<i>Gmelina arborea</i>								9	
<i>Jacaranda mimosifolia</i>									1
<i>Jubberdandia paniculata</i>			1						
<i>Khaya anthotheca</i>			6		1	1			
<i>Kirkia acuminata</i>			26	3	3	5	1	5	
<i>Newtonia buchananii</i>					4				
<i>Pericopsis angolensis</i>	3		16	18	6	18	12	46	2
<i>Pterocarpus angolensis</i>			25	5	3	3	1	6	
<i>Pterocarpus rotundifolius</i>							1		
<i>Swarzia madagascarensis</i>								35	
<i>Terminalia sericea</i>								2	
<i>Toona ciliata</i>									1
<i>Widdringtonia whytei</i>				1				1	

Note: Blantyre District has been omitted from this table due to difficulties associated with surveying large numbers of venders. In general, the key species observed on sale were *Combretum imberbe*, *Dalbergia melanoxylon* and *Pericopsis angolensis*.

Source: TRAFFIC survey data.

Types of woodcarvings produced in Malawi

Malawian woodcarvers produce a wide variety of carvings, which include utensils, chessboards, furniture, ornaments and other items. In order to ascertain species preference for production of different types of carvings, these have been divided into five categories: 1) utensils, which include bowls, goblets, spoons, mortars, and salt/pepper shakers; 2) chessboards and pieces; 3) furniture, such as lamps, candle holders, ash trays, cigarette boxes, and chief's chairs; 4) ornaments, which include figurines, masks, animal carvings, bangles, necklaces, and walking sticks; and 5) other, which consists of any other carving that does not fit into the above four categories. Certain species are preferred for producing different types of woodcarvings, and these preferences are presented in Table 3.

Table 3
Percentages of woodcarvers reporting preferences for selected tree species, by carving category

SPECIES	UTENSILS	CHESSBOARDS	FURNITURE	ORNAMENTS	OTHER
<i>Albizia gummifera</i>	0.3%	4.6%	2.6%	3.6%	0%
<i>Colophospermum mopane</i>	4.0%	1.3%	3.0%	3.3%	2.0%
<i>Combretum imberbe</i>	41.0%	8.6%	34.3%	45.6%	42.6%
<i>Dalbergia melanoxylon</i>	34.3%	13.3%	22.6%	36.3%	14.3%
<i>Kirkia acuminata</i>	0.6%	6.0%	2.3%	7.0%	0.6%
<i>Pericopsis angolensis</i>	15.0%	5.6%	24.0%	22.0%	10.0%
<i>Pterocarpus angolensis</i>	1.3%	1.6%	2.0%	5.0%	0.6%

Source: TRAFFIC survey data.

While the variety of woodcarvings produced in Malawi is quite broad, the country is best known for its chief's chairs. These are large items, usually carved from Mwanga *Pericopsis angolensis*, but other species are used as well, such as Mtangatanga *Albizia* spp., Tsanya *Colophospermum mopane* and Mkweranyani *Newtonia buchananii*. Many of the large trees required to make a chief's chair have disappeared from forests close to woodcarving sites. It is reported that one can carve two to five chairs from a large tree, but that the interior wood is wasted when making the chair.

Sources of Malawi's woodcarving species

Woodcarvers were interviewed to ascertain how they acquire the timber they use, and where they get it from. In certain areas such as Mua, respondents reported that timber was relatively available, and that they could access sufficient supplies, while in others, in particular in Blantyre, respondents voiced concern about wood shortages. Woodcarvers have several avenues open to them to acquire timber, and these include: acquiring permits from the Forest Department to collect dead wood from Forest Reserves; purchasing timber from vendors; and purchasing timber from private landowners and village headmen. Not surprisingly, many woodcarvers acquire timber illegally without permits from Forest Reserves and other protected areas.

Photo 3

Mtakataka woodcarver with warrior carved from Mtangatanga *Albizia* spp.



Credit: Nina Marshall

The illegal nature of much of the trade in woodcarvings was not an impediment to data collection for this survey, however, as most woodcarvers spoke openly about the obstacles they encounter in their business, and were eager to seek solutions to the many problems they deal with on a daily basis, such as regulation, lack of customers, and increasingly, a lack of preferred woodcarving species. Information about source is presented below by district.

Balaka District: In this district, woodcarvers reported acquiring their wood supplies from private land and customary land.

Blantyre District: Most of the 500+ vendors selling carvings at the Blantyre PTC reported purchasing carvings for resale. Depending on the orders that are made by visiting dealers and the need to increase stocks for display, vendors reported traveling widely to purchase woodcarvings, for example to Mangochi, Mwanza, Chileka and Thyolo. It was reported that a lot of carving is done at the border (via Mwanza to Mozambique), and the semi-processed carvings brought to Blantyre for finishing and sale.

Chikwawa District: Timber used by woodcarvers from this district originated primarily from private and customary land. Carvers specified purchase from village headmen, and Village Natural Resource Committees.

Dedza District: Woodcarvers reported acquiring timber primarily from protected forests, but also by purchasing from timber vendors. At Mua, woodcarvers reported purchasing dead wood by the meter sourced from the nearby Mua/Livulezi and Tsanya Forest Reserves; this wood is primarily available as firewood. No shortages of wood were reported, although woodcarvers at the Mua-Monkey Bay junction lamented the absence of very large Mwanga *Pericopsis angolensis*, the favorite for producing chief's chairs. In fact, it was reported that extremely large specimens had been gone for many decades (C.M. Chigunda, Mtakataka woodcarver, pers. comm., 2000).

Lilongwe District: Forest resources in this district are extremely degraded. As such, all respondents reported purchasing their timber from visiting vendors.

Machinga District: Most respondents reported purchasing their timber, from chiefs/customary land, as well as from the Forestry Department. Due to the high cost of purchasing indigenous timber, and especially the transport costs, woodcarvers occasionally resort to using the exotics *Gmelina arborea*, *Toona ciliata*, and *Eucalyptus* spp. Source areas for large trees include Mongolo Mountain (12-15 km away), and Ngatala Mountain (50 km away).

Mangochi District: Most respondents reported purchasing their timber, and it was noted that supply was not a problem; timber could always be acquired. Shortages of the popular Phingo *Dalbergia melanoxylon* and Nkolong'onjo *Combretum imberbe* in the region, were however reported by woodcarvers at Club Makokola. Orders are placed to acquire these species from Njelaza (50 km away) and Blue Mountain (70 km away) (M. Askiwy, Zopanga-panga Village woodcarver, pers. comm., 2000).

Mwanza District: A small number of respondents reported purchasing timber, but far more reported acquiring it from protected forests, and private or customary land. It appears that wood supply is more plentiful in this district, and sales from farmers and village headmen are common.

Salima District: All respondents reported purchasing their timber, as timber resources in this region have been depleted. Woodcarvers at Senga Bay reported supply shortages, and that large sized *Pericopsis angolensis* in the Senga Hills were no longer available. It was also stated that the soils of the region are unfavorable to *Dalbergia melanoxylon* and *Pericopsis*, hence these species have never been plentiful in the area. Wood is reportedly sourced from Mua Forest Reserve (in particular *Pericopsis angolensis*), and from as far away as Mwanza District, where carvers acquire *Dalbergia melanoxylon*, *Combretum imberbe* and *Pericopsis angolensis*. Some travel by boat for five hours across Lake Malawi and 70 km inland to Makanjila to obtain supplies of *Dalbergia melanoxylon* (P. Kondowe, Senga Bay woodcarver, pers. comm., 2000).

Zomba District: Woodcarvers reported purchasing their timber, primarily from customary and private land. It is also likely that wood is sourced from the forest reserves on the Zomba plateau.

It is interesting to note that while forest reserves supply woodcarvers in Chikawa, Dedza, Machinga, Salima and Mwanza Districts, customary and private land is an important source of wood for the remaining districts. Mwanza District seems to have the most options for woodcarvers, with sources identified as protected forests, as well as customary and private land. A few producers indicated that they on occasion obtain timber from Mozambique, and it is highly likely that a significant portion of the carvings produced at the border originate from Mozambican forests. However, while woodcarvers reported shortages of preferred species in certain areas of the country, few people actually said that they could not obtain what they needed from within Malawi. Trade in wood from Mozambique is certain to occur, but its importance to the woodcarving industry is unknown at present. Imports go largely undocumented, because the border is porous; one can cross it virtually anywhere

Photo 4

Woodcarver working at Mtakataka, Dedza District



Credit: Nina Marshall

without controls. Reported imports of timber from Mozambique are presented in Table 7; these figures do not clarify the issue and it could be possible that woodcarving timber enters the country as fuelwood. Further, few people (if any) would travel hundreds of kilometers by bicycle simply to cross the border at a designated Customs point (Samalani, National Statistical Office, pers. comm., 2000). At the same time, the status of forests across the border in Mozambique are far better than those within Malawi in Mwanza District, and therefore the possibility that wood stated as originating from Mwanza District actually comes from Mozambique.

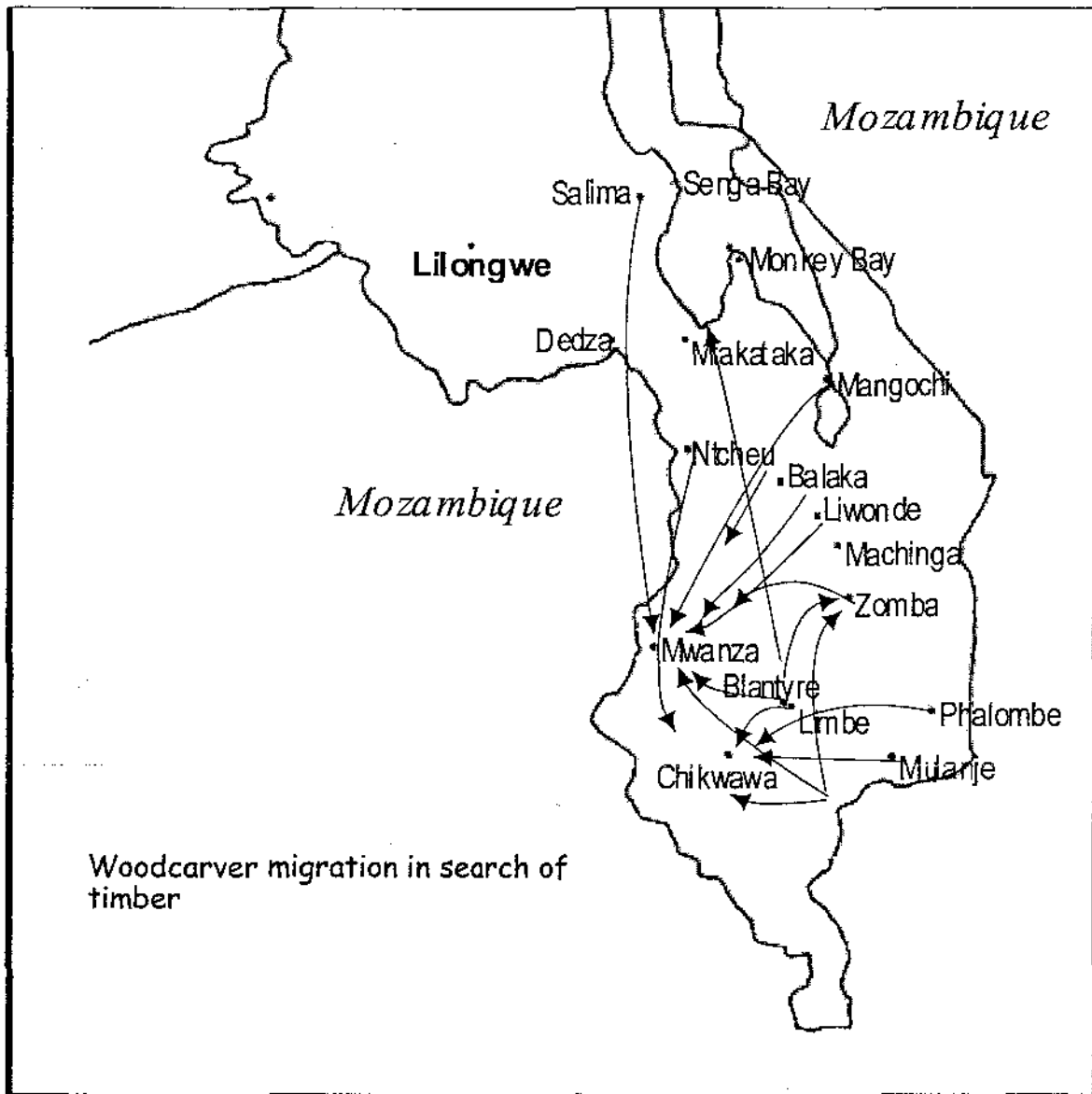
Availability of wood supply

Information on availability of woodcarving species was collected during this survey, by compiling woodcarver's views about whether species supply is thought of as being abundant, satisfactory, or critical. The results of this query were mixed, and little correlation was found between the status of species and the comments by woodcarvers. It was concluded that this was due to woodcarvers being able to travel throughout the region (transport costs permitting) to obtain required supplies, and the availability of wood from vendors who sell timber in areas where trees are scarce. A clearer picture arises when one examines the movements of woodcarvers over time, and the reasons for their change in location. Woodcarvers were asked if they had

operated anywhere previous to their current location, and if they had moved, they were requested to explain the reason. The two most frequently provided answers were because of scarcity of wood, and lack of customers. The movements of those who specified scarcity of species have been mapped out, as have the movements of those specifying relocation to access customers (see Map 2 and Map 3).

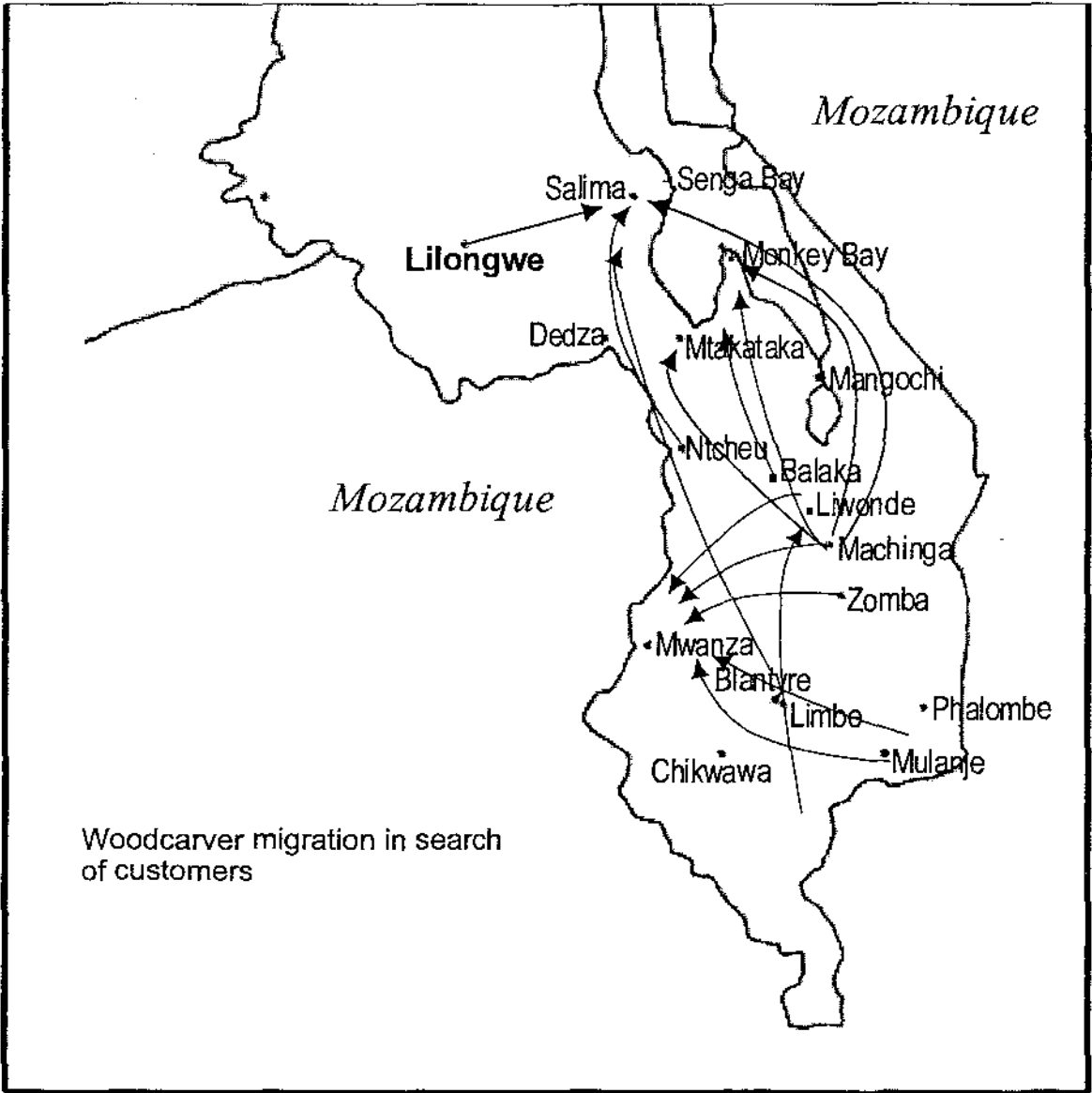
Map 2

Movements of woodcarvers due to scarcity of wood supply



It is evident from Map 2, which documents movements of woodcarvers due to scarcity of wood supply, that woodcarvers have been moving from the central and southeastern parts of the country into Chikwawa and Mwanza Districts. Only a few movements were recorded in the opposite direction, where several carvers moved from Thyolo and Blantyre up to Zomba, and to Mtakataka near the Mua Forest Reserve. Scarcity of species, in particular *Dalbergia melanoxylon* and *Combretum imberbe*, in the densely populated areas of Balaka, Liwonde, Machinga, Zomba, Blantyre, Thyolo, Mulanje and Phalombe, have prompted a mass movement of woodcarvers in search of new supplies. This is not to say that woodcarvers are absent from these areas, in fact these areas do support woodcarvers (see section on *Malawi's woodcarvers*). However, one can see from Map 2 that of the woodcarvers who do operate in these areas, very few are recent migrants, in contrast to those in Chikwawa and Mwanza Districts.

Map 3
Movements of woodcarvers due to lack of customers



A reverse stream of movement is seen in Map 3, which documents movements of woodcarvers in search of customers. As with Map 2, woodcarvers seem to be departing the densely populated areas stretching from Balaka south to Thyolo and Mulanje. Destinations include Mwanza District, possibly because buyers visit the area to purchase carvings in bulk for export, and the tourist route along Lake Malawi. Senga Bay, Monkey Bay, Cape Maclear, Mua and the Mtakataka turnoff have absorbed the largest number of immigrants, all of whom stated lack of customers and poor business as reasons for moving. Lilongwe has also been a destination for woodcarvers, but since this city is only a transit point for tourists, fewer people have found it to be a lucrative site for vending. It is further apparent that Mwanza District (and to a lesser extent Chikwawa District) are receiving an influx of woodcarvers looking for customers and a reliable wood supply, but no one is moving from these districts.

Photo 5

Wastage of timber following harvest of the trunk, Mua Forest Reserve



Credit: Nina Marshall

Species mentioned as being particularly abundant in Mwanza District include *Combretum imberbe*, *Dalbergia melanoxylon*, *Pterocarpus angolensis*, *Kirkia acuminata*, *Albizia gummifera*, and *Pericopsis angolensis*. Species mentioned as being in short supply in Dedza District were *Colophospermum mopane*, *Pericopsis angolensis* and *Pterocarpus angolensis*. The most frequently mentioned species in discussions of insufficient supply were *Combretum imberbe* and *Dalbergia melanoxylon*. In general, reports of availability of species can be a barometer of supply, but they must be viewed with caution. Widespread availability could indicate that the species is common and in plentiful supply, or it could mean that the species is suffering significant decline because it is being harvested and placed on the market in large quantities. Finally, wood supply in Mwanza District may not be as plentiful as is perceived by the woodcarvers. Apart from the likelihood that supplies increasingly may be sourced in Mozambique, tree scarcity in the district has led some woodcarvers to switch to stone carving. A new association, the Umodzi Craft Society, has recently been formed with the aim of discovering markets and building capacity for carvers. The society currently has 30 members, who carve both stone and wood (Musukwa, 2000).

Regulation and Legislation

The *Forestry Act, 1997* and the *Forest Rules* under this Act, govern the management, conservation and utilization of forests in Malawi. The National Forestry Policy aims at promoting the sustainable management of Malawi's forest resources for the improvement of the quality of life of the people of Malawi (Anon., 1996a). A number of sections of the *Forestry Act, 1997* are directly applicable to the woodcarving industry. Specifically, in Part III, Purposes of the Act, two entries are directly relevant, and these are: 3(e) "to promote sustainable utilization of timber, fuelwood and other forest produce"; and 3(h) "to control trafficking in wood and other forestry produce including exportation and importation". Part VIII, Utilization of Forest Produce in Forest Reserves and Customary Land, pertains to licensing and sustainable use of forest produce on customary land, public land, forest reserves and protected forest areas. It is stated that it is prohibited to "cut, take, fell, destroy, uproot, collect and remove forest produce" (which as per Part I includes trees, timber, firewood, branch wood, poles, and roots) from the above-mentioned areas without a license. It is noteworthy that section 50(1), pertaining to customary land, states that residents of a village may collect forest produce from customary land other than village forest areas for domestic use. Section 50(3) further states that "where the wood arising from any activity on customary land is in excess of community domestic needs, the excess wood shall be disposed of by the village natural resources committee for the benefit of the community". This indicates that, theoretically, one cannot collect unlimited quantities of wood on customary land, aiming to sell it commercially. Part VIII further states that permits are required for import, export or re-export of forest produce; these permits are issued by the Director of Forestry.

Part X of the *Forestry Act* outlines the offenses and penalties that shall apply when the Act has been contravened. In the case of illegal harvesting of forest resources a person found guilty shall be liable to a fine of MWK5,000 and to imprisonment for a term of two years. Section 68 further sets out a fine of MWK20,000 and imprisonment for ten years, for any person who knowingly receives forest produce illegally, is found in possession of forest produce without a permit, or who traffics in forest produce without a license.

Part XII, which discusses miscellaneous issues, highlights two pertinent issues directly related to the woodcarving industry. First, the Director of Forestry is the only legitimate authority allowed by law to permit any individual to undertake a commercial venture such as woodcarving. None of the woodcarving producers and traders targeted during the course of this study was able to produce a signed permit from the Director of Forestry. Second, indigenous and endangered tree species cannot be cut down without the written permission of the Director of Forestry.

In addition to the licenses and permits that individuals are supposed to obtain prior to harvesting timber, a fee in the form of a royalty must also be paid to the Forestry Department (Table 4). These rates apply to standing timber. Smaller amounts of dead wood can be removed from forest reserves, at a price of MWK 5.00 per headload (this is generally removed for firewood).

Table 4
Forest (Amendment) Rules, 1999, Second Schedule, Royalties for Indigenous Trees

CATEGORY	SCIENTIFIC NAME	ROYALTY per TREE (MKW)
Class I	<i>Khaya nyasica</i> <i>Combretum imberbe</i> <i>Colophospermum mopane</i> <i>Dalbergia melanoxylon</i> <i>Pterocarpus angolensis</i>	1,500.00
Class II	<i>Albizia gummifera</i> <i>Newtonia buchananii</i> <i>Burkea africana</i> <i>Swartzia madagascariensis</i>	1,000.00
Class III	<i>Pericopsis angolensis</i> <i>Kirkia acuminata</i> <i>Gmelina arborea</i> <i>Acacia nigrescens</i> <i>Toona ciliata</i>	700.00

Source: Forest (Amendment) Rules, 1999.

Malawi provides protection to a number of tree species, in the *Forest Rules* (Laws of Malawi, Forest Chapter 63:01, 1984). No indigenous endangered tree shall be cut down without the written permission of the Director of Forestry. These species are: *Adina microcephala*, *Azelia quanzensis*, *Borassus aethiopicum*, *Bridelia micrantha*, *Burkea africana*, *Colophospermum mopane*, *Cordyla africana*, *Hyphaene crinita*, *Khaya nyasica*, *Pterocarpus angolensis*, and *Terminalia sericea*.

Implementation of forestry legislation and controls

It became apparent during the course of this study that indigenous trees whose conservation status is recorded as endangered, are being illegally exploited. Understanding of forest regulations varies from region to region, and it appears that woodcarvers in Lilongwe, Mangochi and Salima Districts have limited knowledge of regulations, while in Mwanza, Dedza and Chikwawa Districts the understanding is better. This difference is attributed to the woodcarvers' proximity to the resource in the latter three districts, and the likelihood that they will be involved in the actual harvest. The former districts are home to woodcarvers who are primarily involved in carving and vending, and procure their supplies from elsewhere, often by purchasing from timber vendors. Notwithstanding, most individuals are familiar with the regulations pertaining to the extraction of indigenous timber resources from customary land, although many expressed confusion as to which regulations apply and at what times.

Efforts by Forestry Department officials to enforce legislation, especially in forest reserves, are met with difficulties at every step of the way. Apart from reports of corruption among department employees, more tangible obstacles are evident. For example, forestry officials charged with protecting the Mua, Livulezi and Tsanya Forest Reserves in Dedza District report inadequate staff and resources (there is no telephone, and the one motorcycle they have is broken) to police the area. Patrols are conducted three times per week, and each patrol results in at least one confiscation of illegally acquired timber, yet forestry officials must travel by public transport to report the offense at Dedza, and have little ability to remove seized timber from the site of confiscation. Most cases result in nothing more than confiscation of material; in 1999 only one person apprehended by the Mtakatika forestry officials went to trial and subsequently was fined MWK 3,000 (L. Solijala, Forestry Assistant, Mtakatika, pers. comm., 2000).

The domestic trade in Malawi's woodcarvings

This study has revealed that a significant quantity of woodcarvings are sold locally within Malawi. Customers for these woodcarvings include local residents and tourists who buy souvenirs, and traders (both local and foreign) who purchase woodcarvings for export. Traders generally sell their woodcarving products either at local markets, outside established retail shops, street markets, roadside vending stalls, or by unlicensed street vending or barter. During this survey it was found that the two most common selling locations favored by the majority of traders were street markets and strategic roadside vending.

Collection of data on customers indicates that there is a significant internal trade in woodcarvings largely due to the percentage of traders reporting sales to other traders. According to the information presented in Table 5, certain districts are favored by those buying souvenirs, such as Lilongwe, Mangochi and Salima Districts, while others experience more resident and trader purchases, in particular Dedza, Mangochi, Mwanza and Salima Districts. Of note is that tourists purchase a limited number of items, while traders and local residents who purchase for resale, buy in much larger quantities.

Traders generally purchase woodcarving products with a view to either re-selling in cities such as Blantyre and Lilongwe or exporting to regional destinations. Tourist purchases are made at popular tourist sites such as Senga Bay and Monkey Bay on the shores of Lake Malawi, or at sites along the routes where tourists would normally travel to get from one tourist spot to another. Tourists are a common site in Salima, Mangochi, Lilongwe, and Dedza Districts, all of which are situated along the main tourist routes of Malawi.

Data collected during this survey indicate that ornaments are the most popular woodcarvings, followed by utensils and furniture, while games (chessboards) are considered to be the least popular woodcarving products. However, not all the woodcarvings are consistently popular throughout all the districts. For instance, games, ornaments, and utensils are not popular woodcarving products in Machinga and Balaka Districts. There were only three districts in which all five categories of woodcarving products were thought to be popular, Salima, Dedza and Lilongwe. This could be attributed to the fact that these three districts also happen to be Malawi's popular tourist destinations. Additionally, the choice and variety of woodcarving products is also perceived as

being wider as opposed to some of the other districts such as Machinga and Balaka which specifically specialize in producing woodcarvings for furniture purposes only.

Table 5

Categories of customers purchasing woodcarvings in Malawi

DISTRICT	TRADER	TOURIST	RESIDENT
Balaka	Low	Low	Low
Chikwawa	Low	Low	Medium
Dedza	Medium	Medium	High
Lilongwe	Low	High	Low
Machinga	Low	Low	Low
Mangochi	Medium	High	Medium
Mwanza	Very high	Low	High
Salima	High	High	High
Zomba	Low	Low	Low

Source: TRAFFIC survey data.

Pricing

The prices quoted for various woodcarvings during this survey varied considerably. It was determined that this was due to the different considerations that vendors of woodcarvings use to decide what price to charge. Variable costs (the costs of materials, labour and transport) and market forces (the strength of the local currency) are the main considerations when pricing woodcarving products. Naturally, woodcarvers also used their bargaining expertise when selling carvings, and used factors such as nationality, dress and language as a means to determine what price to ask. It was also observed that the techniques employed in determining woodcarving prices varied between districts. For example, market forces and variable costs were said to be most important in Dedza, Mwanza and Salima Districts. In general it was observed that most individuals are not very perceptive when determining the price of their woodcarving products. For example, few consider transport and material costs as being important pricing determinants. It was observed that large woodcarving products, such as standing statuettes like the Malawi fisherman, generally command high prices, followed by the medium-sized woodcarvings like furniture (chiefs chairs) and chessboards. Table 6 illustrates the variations in price between districts for categories of woodcarvings.

Table 6

Mean prices for curios in selected districts, 1998

DISTRICT	MEAN PRICE CHARGED (MWK)				
	CHESSBOARDS	OTHER	FURNITURE	ORNAMENTS	UTENSILS
Balaka	-	655.00	8.50	-	-
Chikwawa	-	28.57	4.09	3.22	11.88
Dedza	-	490.50	40.47	36.58	3.58
Lilongwe	254.54	562.27	361.18	197.53	162.18
Machinga	-	-	105.08	-	-
Mangochi	185.14	225.58	149.57	52.26	45.78
Mwanza	-	50.41	10.13	2.32	3.73
Salima	219.92	287.23	195.77	81.12	47.12
Zomba	104.16	188.20	50.00	40.89	60.79
MEAN	190.94	310.97	102.75	59.13	47.86

Source: TRAFFIC survey data.

Volume of domestic trade

Ascertaining the volume of domestic trade in woodcarving is hindered by the sporadic nature of sales. Woodcarvers report that sales vary widely, and are totally dependent upon tourist arrivals and occasional visits by foreign buyers. In all areas surveyed, souvenir sales range from about ten to 20 small items per month, and about zero to ten larger items, such as chief's chairs. Numerous woodcarvers mentioned months where virtually nothing was sold; these periods corresponded with low tourist arrivals and no visits from larger buyers.

Woodcarvers did report that buyers occasionally arrive and either buy what they want on the spot, or place an order which is then filled by the woodcarvers at the site. These visits, however, were by and large unpredictable and the woodcarvers had no way of preparing for such large orders, as they did not have the capital to purchase sufficient supplies of timber to produce large quantities of woodcarvings.

Photo 6

Curio stalls at Senga Bay, Salima District



Credit: Nina Marshall

International Trade

Due to the irregular patterns of domestic sales, international trade figures have been examined and are regarded as being the most accurate source of information on trade volumes, because it appears that a significant portion of the woodcarvings sold locally are eventually exported. In Blantyre, it was reported that dealers from Italy, Canada, the Netherlands, Portugal, and USA among others, arrive with containers and fill them up; this happens about twice per year. Quantities exported directly by Blantyre vendors are variable, with one exporter reporting exports of five to six cartons of mixed carvings every two to three months, with a weight range of 175 to 450 kg. This exporter reported on the type of documentation required for export, which corresponded to documentation reportedly received by the Customs and Excise Department, and which is then sent on to the National Statistical Office in Zomba (R. Dula, Controller Audit, Customs Department, Blantyre, pers. comm., 2000).

Table 7
Imports of timber from Mozambique, 1996-1998

IIS CODE and DESCRIPTION	1996		1997		1998	
	VALUE MWK	QTY (m ³)	VALUE MWK	QTY (m ³)	VALUE MWK	QTY (m ³ /KG)
44072300 Sawn Baboen, Mahogany, Imbuia and Balsa Wood	25,813	14	-	-	-	-
44012200 Non-coniferous Wood in Chips or Particles	-	-	-	-	23,189	91 kg
44072100 Sawn Dark Light Red Meranti, White Lauan, Meranti, Seraya	-	-	-	-	251,914	20 m ³
44079900 Other Sawn Wood of Thickness Exc. 6 mm	-	-	36,737	11	811,317	285 m ³
TOTAL	25,813	14	36,737	11	1,086,420	91 kg; 305 m³

Note: There were no imports of timber recorded from Mozambique in 1995.

Source: National Statistical Office (Economics), Zomba, 2000.

Table 8
Exports of curios (Statuettes and other ornaments of wood) from Malawi, 1995-1998

HS COMMODITY CODE 44201000 --- Statuettes and other ornaments of wood								
IMPORTING COUNTRY	1995		1996		1997		1998	
	VALUE MWK	QTY (KG)	VALUE MWK	QTY (KG)	VALUE MWK	QTY (KG)	VALUE MWK	QTY (KG)
Austria	-	-	6,640	532	-	-	-	-
Canada	-	-	-	-	358	3	-	-
Central African Republic	-	-	-	-	3,500	140	-	-
Germany	-	-	-	-	-	-	60,000	260
Ireland	-	-	1,000	35	-	-	-	-
Italy	800	30	-	-	-	-	-	-
Japan	1,800	520	325	65	-	-	-	-
Kenya	-	-	400	120	-	-	14,395	200
Mozambique	-	-	-	-	16,453	12	-	-
Namibia	-	-	-	-	-	-	450	30
Netherlands	-	-	420	24	23,304	412	49,245	1,040
South Africa	7,250	760	31,783	3,026	103,600	4,918	258,821	18,912
Spain	-	-	-	-	-	-	339,610	1,600
Switzerland	-	-	600	50	-	-	-	-
United Kingdom	88,850	813	90,121	2,130	7,000	519	217,729	1,724
United States of America	-	-	51,719	372	71,500	2,118	47,455	24
Zambia	-	-	-	-	-	-	1,550	196
TOTAL	98,700	2,123	183,008	6,354	225,715	8,122	989,255	23,986

Source: National Statistical Office (Economics), Zomba, 2000.

Table 9 Exports of curios (Wood marquetry and inlaid wood caskets and cases for jewels) from Malawi, 1995-1998

HS COMMODITY CODE 44209000 — Wood marquetry and inlaid wood caskets and cases for jewels								
IMPORTING COUNTRY	1995		1996		1997		1998	
	VALUE MWK	QTY (KG)	VALUE MWK	QTY (KG)	VALUE MWK	QTY (KG)	VALUE MWK	QTY (KG)
Australia	48,483	2,486	3,800	1,216	86,707	2,150	31,956	614
Austria	1,900	205	2,380	55	-	-	-	-
Belgium	-	-	200	8	1,900	28	-	-
Bosnia and Herzegovina	200	15	-	-	-	-	-	-
Botswana	14,208	1,692	10,980	1,101	10,800	693	-	-
Brazil	-	-	-	-	-	-	5,900	399
Canada	6,300	1,018	349,152	6,443	900	44	-	-
China (Taiwan)	97,195	9,773	56,025	19,535	248,036	17,000	-	-
Cyprus	2,000	86	982,859	2,335	-	-	-	-
Czechoslovakia	45,959	647	89,417	2,022	-	-	-	-
Denmark	800	18	6,500	91	-	-	109,723	5,022
France	500	58	1,000	87	114,000	662	-	-
Germany	5,300	197	26,275	1,172	3,380,669	12,272	1,250	11
Greece	39,146	2,943	55,116	1,702	-	-	-	-
Hungary	52,623	2,704	5,903	298	6,080	682	-	-
Israel	97,368	4,664	73,319	15,264	45,400	4,126	-	-
Italy	3,900	322	455,278	12,668	967,756	14,655	30,000	193
Japan	1,650	119	-	-	8,130	346	-	-
Kenya	1,800	420	13,856	2,850	6,280	1,820	6,890	1,856
Korea (South)	-	-	-	-	1,000	35	1,800	159
Kuwait	-	-	1,000	27	-	-	-	-
Lesotho	-	-	2,000	180	-	-	-	-
Luxembourg	-	-	10,000	298	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-
Mauritius	1,000	61	-	-	446,250	8,925	-	-
Mozambique	4,000	401	1,700	500	250	2	3,000	465
Namibia	23,894	3,371	10,880	1,357	2,300	210	2,360	30
Netherlands	1,100	50	4,111	675	52,000	2,695	3,100	160
New Zealand	5,580	92	6,861	568	8,100	252	-	-
Norway	700	41	-	-	1,350	109	2,680	128
Portugal	13,645	472	13,450	616	11,426	369	451,933	6,000
Reunion	6,940	353	-	-	-	-	-	-
South Africa	1,099,734	267,078	2,271,673	208,428	990,382	96,851	326,452	52,555
Spain	-	-	-	-	-	-	2,000	90
Swaziland	3,020	1,573	1,600	1,110	4,750	345	3,800	355
Switzerland	1,750	70	-	-	-	-	-	-
Uganda	3,300	660	4,300	440	-	-	-	-
United Arab Emirates	-	-	2,965	283	18,200	310	182,465	728
United Kingdom	159,765	13,626	540,732	35,449	1,320,870	44,587	679,886	19,212
United Republic of Tanzania	-	-	-	-	528,000	5,000	-	-
United States of America	248,466	9,317	304,977	6,080	1,748,538	16,414	1,179,455	9,916
Zambia	2,696	196	1,460	42	195,443	2,514	21,702	1,341
Zimbabwe	172,593	23,272	166,664	13,399	54,310	1,687	4,900	652
TOTAL	2,167,515	348,000	5,476,433	336,299	10,259,827	234,783	3,051,252	99,886

Source: National Statistical Office (Economics), Zomba, 2000.

As mentioned above, Malawi's trade in woodcarvings is most pronounced for its international component. Malawian woodcarvings are now widely available throughout the world, with 45 countries documented as importers for the period 1995 to 1998. Of note are the large number of African countries importing Malawian woodcarvings; these include Botswana, Central African Republic, Kenya, Lesotho, Mozambique, Namibia, South Africa, Swaziland, Tanzania, Uganda, Zambia, and Zimbabwe. This intra-regional trade points to the popularity of Malawian woodcarvings, and the many tourist markets in neighboring countries where these products are sold.

In order to ascertain total exports of wood curios from Malawi, two different Customs codes must be examined. These are: 1) 44201000 – Statuettes and other ornaments of wood; and 2) 44209000 – Wood marquetry and inlaid wood caskets and cases for jewels. The first code is self-explanatory, while second code appears to include a variety of items other than wood curios. However, according to Samalani (Samalani, National Statistical Office, pers. comm., 2000), it is in this category that chief's chairs are recorded, as are medium to large boxes and chests. Wood caskets are not a notable export from Malawi, hence this Customs code can reliably be regarded as a code pertaining to woodcarvings. To ascertain total exports, these figures for both codes must be combined; Tables 8 and 9 contain export figures for these categories. Total exports of woodcarvings are 350,123 kg for 1995, 342,653 kg for 1996, 242,905 kg for 1997, and 123,872 kg for 1998. A decline in exports can be observed for the period, with a marked drop in 1998 in the larger woodcarvings of chairs and chests, and an increase in the smaller carvings (statuettes and other ornaments).

As can be seen from Tables 8 and 9, Malawi's woodcarvings are exported to a large number of countries. Examination of the trade data reveals that certain countries are consistent importers, the most notable being South Africa and the United Kingdom. Table 10 presents the figures for the top three importers for the period 1995 to 1998, by volume and by value. For all years, the top three importers dominate the trade, with total imports for the three countries never comprising less than 60% of the overall market for either volume or value.

Table 10
Malawi's top three importers, by weight and value, and percent of total, 1995-1998

1995	1 st Country	2 nd Country	3 rd Country	TOTAL for all 3	% of ALL
KG	South Africa 267,838 kg	Zimbabwe 23,272 kg	United Kingdom 14,439 kg	305,549 kg	All: 350,123 87%
VALUE	South Africa MWK 1,106,984	United Kingdom MWK 248,615	USA MWK 248,466	MWK 1,604,065	All: 2,266,215 70%
1996					
KG	South Africa 211,454 kg	United Kingdom 37,579 kg	China (Taiwan) 19,535 kg	268,568 kg	All: 342,653 78%
VALUE	South Africa MWK 2,303,456	Cyprus MWK 982,859	United Kingdom MWK 630,853	MWK 3,917,168	All: 5,659,441 69%
1997					
KG	South Africa 101,769 kg	United Kingdom 44,587 kg	USA 18,532 kg	164,888 kg	All: 242,905 67%
VALUE	Germany MWK 3,380,669	USA MWK 1,820,038	United Kingdom MWK 1,327,870	MWK 6,528,577	All: 10,485,542 62%
1998					
KG	South Africa 71,467 kg	United Kingdom 20,936 kg	USA 9,940 kg	102,343 kg	All: 123,872 82%
VALUE	USA MWK 1,226,910	United Kingdom MWK 897,615	South Africa MWK 585,293	MWK 2,709,818	All: 4,040,507 67%

Source: Calculated from data contained in Tables 8 and 9.

Procedures for export of woodcarvings are well-known to local exporters, and documents are easily procured. For example, necessary Customs forms can be purchased at local stationary shops. International traders can rely on the Malawi Export Promotion Council to provide information on required documentation and transport routes, and this organization has produced literature to facilitate the exporting process. Annex I contains excerpts from this literature on export documentation and export routes.

DISCUSSION

Malawi's woodcarvers operate in a largely unstructured manner in all sizable urban areas in the central and southern parts of the country. Choice of location is dominated by two factors, the search for sufficient timber supplies and access to customers. Woodcarvers situated in resource-poor areas are able to acquire timber from districts and neighboring countries where forests are able to supply the preferred species (in particular *Dalbergia melanoxylon*, *Combretum imberbe* and *Pericopsis angolensis*), and transport or purchase the timber from these areas to where they operate. Resource-rich areas are generally typified by fewer customers, as these areas are off the tourist route, however it is increasingly evident that buyers travel to these regions to purchase woodcarvings in bulk. Reports of wood scarcity are widespread, and have resulted in movements of woodcarvers to better sites, however, this scarcity has not precluded acquisition of required timber.

Photo 7

Woodcarvers displaying their craftwork at Mtakataka, Dedza District



Credit: Nina Marshall

Trade in Malawian woodcarvings is on the surface largely domestic, but the vast majority of these items are exported. Customers buying woodcarvings are tourists who purchase souvenirs they can carry out of the country themselves, but more importantly, customers are local residents and foreign buyers who purchase with the aim of exporting the woodcarvings. This observation is supported by a review of international trade data revealing 45 importing countries, and healthy markets especially in South Africa, USA, and the United Kingdom. Reported exports of wood curios have declined from 350,123 kg in 1995 to 123,872 kg in 1998. The reported value of exports has increased from MWK 2,266,215 in 1995 to MWK 4,040,507, but in real terms, this also represents a decline because of the devaluation of the Malawi Kwacha.

A reduction in exports could be attributed to better implementation of forestry legislation, however this survey reveals that controls are not adhered to nor enforced to any great extent. Exploitation of forest resources continues unabated, with the result being extreme depletion of selected species in Blantyre, Dedza, Lilongwe, Machinga, Mangochi, Salima and Zomba Districts. It is apparent that reduced timber supply in these districts is causing harvesters to focus on Chikwawa and Mwanza Districts, as well as on neighboring Mozambique. This could be a major factor contributing to the decline in exports of wood curios from Malawi.

The need to plant trees valued for woodcarving was brought up in discussions with woodcarvers, and despite the acknowledged length of time required for these species to reach harvestable size, woodcarvers thought that the Forestry Department should be attempting to establish plantations of desired hardwood species. The traditional species cultivated are Pine and *Eucalyptus*, both of which are not in demand by woodcarvers. Also suggested as a potential plantation species that could be promoted by the Forestry Department is the exotic, *Toona ciliata*, although many woodcarvers still regard it as substandard and not an option while indigenous hardwoods are still available.

A poor economic and employment environment in Malawi means that woodcarving will remain an important option for many Malawians, but at the same time, it is clear that this option is becoming less attractive as the price of timber rises due to transport costs and unavailability of preferred species. For the industry to persist in the future, efforts must be made to secure the wood supply, and this objective must be met with a number of activities which include: cultivation of preferred species; increased regulation to maintain wild stocks; education of woodcarvers about alternative exotic species; campaigns to promote alternative species among consumers; and establishment of co-operatives and associations to assist in meeting these objectives.

CONCLUSION AND RECOMMENDATIONS

The woodcarving industry, like many of the users of Malawi's forest estate, selects species for a targeted harvest. Preference for durable, heavy, dark woods with a beautiful grain, has resulted in the depletion of numerous indigenous hardwoods, most notably *Combretum imberbe*, *Dalbergia melanoxylon* and *Pericopsis angolensis*. Side by side with this reduction in availability of preferred indigenous hardwoods, is a decline in exports of wood curios. At the same time, there is no indication that the number of woodcarvers is decreasing, as it would be if people opted for different means to earn a living. The reality of the situation is that few other employment options exist, and as such woodcarvers continue to derive what income they can from a decreasing resource base. Malawi's forest resources will continue to decline unless measures are taken to improve forest management and address the factors contributing to over-exploitation. It can be expected that at least in most areas, a lack of wood will result in reduced income to woodcarvers. While woodcarving is only one of the many factors having a negative impact on Malawi's forests, action taken to address the problems of the industry would be beneficial to both carvers and the resource they rely on. Suggested actions to address the situation are listed below, and come under the categories of cultivation, promotion/education, inventories, regulations and industry organization.

Cultivation of alternative exotic species

There is an urgent need to substitute declining indigenous hardwoods with fast-growing alternative species. Efforts should be made to cultivate and encourage the use of such species. Efforts should ideally be led by the Forestry Department and the Forest Research Institute of Malawi (FRIM), as tree planting initiatives are ongoing, both in government-owned plantations, and throughout the country under forest extension initiatives. Cultivation of alternative species must take place in government plantations, and must also take place on other categories of land ownership (i.e it must also be undertaken where possible by woodcarvers, as this sector should develop partial responsibility for the resources they use). Action by the Forestry Department may out of necessity have to be preceded by a shift away from the standard species that are planted (*Pinus* and *Eucalyptus*), to those that are regarded as more appropriate for different end-uses by various sectors. For the woodcarving industry, the suggested alternative exotic species are: *Gmelina Gmelina arborea*, *Grevillea Grevillea robusta*, *Jacaranda Jacaranda mimosifolia*, *Mango Mangifera indica*, *Neem Azadirachta indica* and *Senderela Toona ciliata*.

Cultivation of indigenous species

Although alternative exotic species will assist in satisfying the demand for wood in the short term, the undisputed choice of species are the indigenous hardwoods. Despite the time required for the slow-growing indigenous species to reach saleable sizes, it should be recognized that demand for these species will never cease and that natural stocks will always be under pressure. Consequently, additional supplies of the preferred species will have to be generated. Cultivation by the Forestry Department, as well as by Malawi citizens, is an essential undertaking if Malawi's woodcarving industry is to use indigenous hardwoods in the future.

Promotion of alternative species and cultivation activities (among woodcarvers)

added product. Cultivation is already regarded as a necessary activity by those woodcarvers living in resource-poor areas, but little action has been taken to date. This interest should be capitalized upon, in particular where woodcarvers have stated that they would like to plant certain species, but do not know where to acquire seed. The FRIM Tree Seed Center has an important role to play in expanding their efforts to the woodcarving industry.

Promotion of appropriate species among consumers

Educating consumers about the state of the forest resources in the countries where they buy woodcarvings is no easy task. Even when consumers are aware of the damage they may be causing, they may still opt to purchase what they desire, rather than the environmentally friendly choice. While woodcarvers can publicize the value of purchasing carvings they produce from alternative exotic species from the conservation angle, since the industry is dominated by the international market, efforts could be directed toward the international consumer. It is evident from available trade data that the main consuming countries are South Africa and the United Kingdom, with USA, Zimbabwe and Taiwan importing smaller quantities. Consumer campaigns in these import destinations could comprise education initiatives among traders and key retail outlets, with the aim of increasing awareness about the plight of Malawi's forests, and the need to purchase environmentally friendly woodcarvings, i.e. alternative exotic species, or indigenous species that are sustainably managed or cultivated.

Inventories

As a matter of priority there is a need for the Forestry Department to actively initiate a comprehensive programme of forest surveys and inventories for the three most used timber species, *Combretum imberbe*, *Dalbergia melanoxylon* and *Pterocarpus angolensis*. These three timber species have been identified in this report as currently the most exploited for Malawi's woodcarving trade and there is a need to determine their conservation status as well as levels of extraction, so that effective management can be put into place.

Regulations

During this survey it was found that awareness about the rules and regulations governing forest exploitation is not uniform across the country. Further, adherence to regulations is poor in many areas, resulting in illegal extraction and over-exploitation from Malawi's protected areas. In order to increase compliance with Malawi's forestry legislation, any awareness programme that is implemented among woodcarvers should include a component on regulations.

Increased awareness among wood harvesters must however, go hand in hand with improved implementation of regulations by the Forestry Department. Additional resources (staff, supplies and finances) are needed by those responsible for upholding Malawi's forestry legislation, but any such inputs should be complemented by improved performance in reducing corruption and unethical practices within the appropriate government departments.

Industry organization

Throughout TRAFFIC's research, woodcarvers and vendors alike lamented the deplorable state of Malawi's forest resources and the impediments that it presents to the future of the woodcarving industry. Woodcarvers in particular mentioned that much research had been done on their situation, but minimal action had been taken apart from initial research. Many woodcarvers expressed interest in establishing co-operatives to facilitate wood collection, tree planting, vending and accessing export markets. It appears that woodcarvers in Malawi are poised to work together to ensure a future for themselves, their industry and their forests, and this enthusiasm (and need) could be harnessed for the betterment of the industry as a whole. Although efforts at organization by SEDOM and MEPC may have failed in the past, it may be timely to attempt such efforts again.

There is at present an opportunity to bring together an important group of people, which if successful, could do much to address both the needs of the people, and the management and conservation of the forest estate.

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EXPORT DOCUMENTATION

Documentation in export trade is vital in that documents have to be completed before the consignment leaves the country of origin and at the destination to enable the consignee in the importing country to clear his goods through his local authorities.

TYPES OF DOCUMENTS GENERALLY REQUIRED BY AN EXPORTER

Most of the documents/forms discussed below are obtainable at your bank which will advise you the details of your export documentation and Exchange control requirement.

- (i) **EXPORT PERMIT:** - Some goods are subject to control and may not be exported without an export licence (appendix III). The document is completed so that the exporter is allowed to move the goods out of the country. The purpose of this document is to control how much is exported and to where.
- (ii) **EXCHANGE CONTROL - CDI FORM** - is an exchange control document/form which must be completed for all shipment of which value exceeds K2,000.00. Copies are sent to the Ministry of Commerce and Industry and the Reserve Bank of Malawi. The Reserve Bank will query the exporter at the end of the stated period at which payment was expected to be received to ascertain if such payment has actually been received. If not, then the Reserve Bank demands to know why the payment has not been received.
- (iii) **BILL OF ENTRY** - All exports must be cleared through Customs by submission of a Bill of Entry - Form 34. This document is completed for goods which are from Open Stock. Open Stocks mean that goods are either produced locally or were cleared on Form 21 on importation into this country for consumption. This document has to be completed and submitted in seven copies to Customs upon exportation of goods, which were produced locally or had previously been imported.
- (iv) **THE COMMERCIAL INVOICE** - The Commercial invoice is completed to enable the importer to clear his goods in his country. It contains the name of the exporter, weight, value and description of goods.
- (v) **CERTIFICATE OF ORIGIN** - The Certificate of Origin establishes in the importing country, the origin of the goods to ensure whether they are entitled to preferential duties or not. For example, Malawi Products to the EU have to be accompanied by a EUR1 form. Certificates of origin in Malawi include the Tobacco Control Commission certificate of origin and the Chamber of Commerce and Industry certificate of origin. These certificates are required for most shipments going to USA including most other countries outside the EU.
- (vi) **MOVEMENT CERTIFICATE** - Malawi being a member of the ACP Countries has to complete the EUR 1 Form for all its exports to the EU, in order to enjoy preferential duties; currently duty-free entry for most of them.

DA 59 CERTIFICATE - Exports to the Republic of South Africa must be accompanied by DA 59 certificate in addition to a certificate of origin. These can be obtained at a fee from the Malawi Chamber of Commerce and Industry.

FORM D - The form must be completed for exports to Botswana. Available from Malawi Customs Department, it exempts the importers from paying import duties.

ZIMBABWE CERTIFICATE OF ORIGIN FORM NO. 60 - Under the Malawi/Zimbabwe trade agreement, exports to Zimbabwe enjoy preferential treatment if accompanied by Zimbabwe certificate of Origin Form 60. The form must be completed and submitted to the Controller of Customs in Malawi for verification before the goods are exported to Zimbabwe.

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- (vii) **BILL OF LADING** - When goods have been shipped by sea this is the most important document. The Air Waybill, in the case of Air Freight, is both the consignment note and the Bill of Lading. The definition of the Bill of Lading is:
- (a) A receipt for goods given to the exporter by the shipping company.
 - (b) A document of title to the goods described on it.
 - (c) Evidence of a contract by the company to carry the goods from the port of sailing to port of destination. In countries where they have their own sea ports, the Bill of Lading is completed by the exporter himself. But in the case of Malawi, Bills of Lading have to be completed by the port agents at Nacala, and Durban.
- viii) **THE THROUGH BILL OF LADING** - This is a Bill of Lading normally issued by a clearing agent. The Through Bill of Lading usually is not negotiable at Customs, but counterpart port of destination.
- (ix) **THE CONSIGNMENT NOTE OR AIRWAY BILL** - An Airway Bill is issued for traffic by air, just as the road or railway consignment could as well be called the Road Way Bill or Rail Way Bill respectively.
Like other pre-shipping documents, a consignment note or waybill must bear a customs stamp in order to be accepted. The carrier (e.g. Malawi Railways or Air Malawi) will not accept a consignment note or Air Waybill which is not stamped by Customs.
- (x) **THE SHIPPING INSTRUCTIONS** - This document contains shipping instructions from the exporter to his clearing agent (in land or at the port).
- (xi) **THE CERTIFICATE OF HEALTH/SANITARY CERTIFICATE** - The certificate may be required by the importing country for animal products (Health Certificate) plants and plant products (Phytosanitary certificate). The Health Certificate in Malawi is issued by the Veterinary department and the phytosanitary certificate for agricultural produce by the Agricultural Research Council.
- (xii) **CERTIFICATE OF FUMIGATION** - Some products require fumigation before they can be exported. For such products like dried fish the customs authorities will require this document before passing the entries.
- (xiii) **GSP FORM A** - This document is issued for export of goods to developed countries which are offering preferential treatment to developing countries under Generalised System of Preferences. It is used in Malawi for exports to industrialised countries outside the EEC. It is obtainable from the Chamber of Commerce and Industry.

OTHER DOCUMENTS FROM BUYER REQUIRED BY AN EXPORTER - Apart from the payment documents, an exporter will require the following:

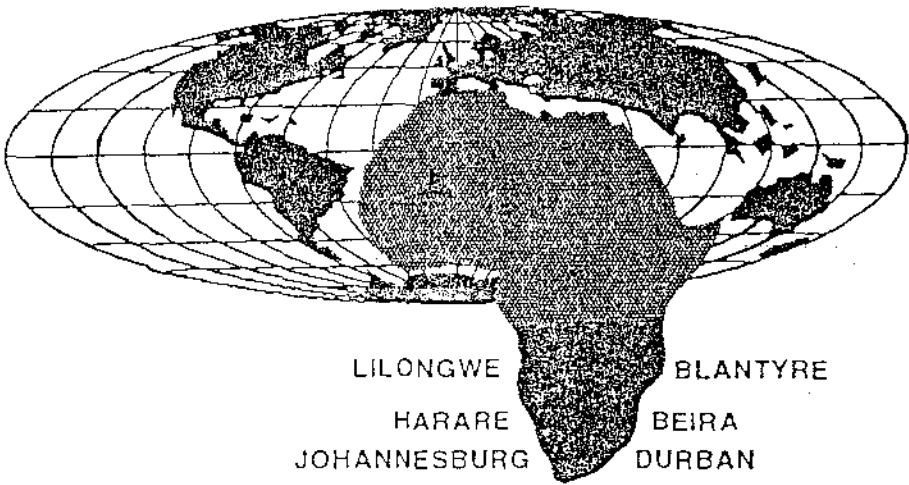
Import Permit - Trading in some products is controlled worldwide or from country to country. Items such as ivory, hides, ammunition, etc, require import permits in most countries. Import permits are required to control influx of prohibited items and drain of foreign exchange. An exporter will therefore require an import licence from his buyer to be attached to his documents for certification by customs authorities before shipping the goods.

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