



# VALUE CHAIN ANALYSIS

Oceania

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# Bark Painting



Image source: <https://www.ayersrockresort.com.au/stories/experience-indigenous-culture-in-uluru>



## Bark Painting: Design and Production Process

| Value Additions          | Description                                                       | Usage            | Dependency          |
|--------------------------|-------------------------------------------------------------------|------------------|---------------------|
| Bark preparation         | Harvest eucalyptus plants and prepare the bark.                   | Bulk volume      | Raw materials       |
| Design conceptualization | Plan design based on traditional stories or personal inspiration. | Fixed amount     | Cultural Traditions |
| Pigment preparation      | Collect and prepare natural ochres and other pigments.            | Custom amount    | Artisan skill       |
| Traditional Painting     | Apply pigments to bark using traditional techniques.              | Custom amount    | Artisan skill       |
| Fixing and finishing     | Apply fixatives and prepare for display or retail.                | Single item only | Artisanal tool      |

## Bark Painting: Distribution Channels

- Art galleries
- Auction houses
- Museum shops
- Online art platforms



## Bark Painting: Consumer Behaviour

| Particular                           | Description                                                                        |
|--------------------------------------|------------------------------------------------------------------------------------|
| Interest in Aboriginal culture       | Buyers now value the deeper cultural meanings within bark paintings.               |
| Appreciation for unique art forms    | Consumers appreciate the artistic uniqueness distinctive aesthetic style.          |
| Investment value of Aboriginal art   | Collectible nature attracts high net worth individuals due to investment potential |
| Desire for authentic cultural pieces | Genuine desire for authentic works directly supporting Aboriginal artists.         |

## Bark Painting: Market Dynamics

| Particular                               | Description                                                             |
|------------------------------------------|-------------------------------------------------------------------------|
| Growing interest in Aboriginal art       | Overseas interest and increasing appreciation is boosting demand.       |
| Supply cap on high-quality bark          | Limited availability of quality bark at present affects production.     |
| Concerns about authenticity and sourcing | Buyers seek assurance on ethical concerns of fair treatment of artists. |
| Influence of major events                | Market events like popular exhibitions and auctions influence prices.   |





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# Boomerang Making

Image source: <https://www.nma.gov.au/defining-moments/resources/earliest-evidence-of-the-boomerang-in-australia>



## Boomerang Making: Design and Production Process

| Value Additions       | Description                                                      | Usage            | Dependency          |
|-----------------------|------------------------------------------------------------------|------------------|---------------------|
| Sourcing & Selection  | Choose high-quality wood (eucalyptus, mulga, etc.)               | Fixed amount     | Raw materials       |
| Cutting & Shaping     | Using tools like chisels and saws to cut and shape the boomerang | Single item only | Artisanal tool      |
| Carving & Detailing   | Add unique artistic & custom carvings with traditional designs   | Fixed amount     | Artisan skill       |
| Polishing & Finishing | Sanding, polishing, and painting for protection and decoration   | Custom amount    | Artisan skill       |
| Trial & Testing       | Testing the boomerangs to ensure proper aerodynamics             | Single item only | Cultural Traditions |

## Boomerang Making : Distribution Channels

- Cultural tourism outlets
- Museums and Gallery exhibits
- Boomerang-specific ecommerce



## Boomerang Making : Consumer Behaviour

| Particular                            | Description                                                                                                                                      |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Appreciation of Heritage              | Consumers value the cultural significance of genuine Boomerangs, appreciating their traditional craftsmanship and ethically sourcing.            |
| Desire for Authentic Boomerangs       | Enthusiasts perceive Boomerangs as collectible items due to their high craftsmanship and historical relevance, often investing in unique pieces. |
| Price Sensitivity opposed to Replicas | Consumers are willing to pay premium prices for authentic Boomerangs, but most tend to be price-sensitive, seeking affordability in replicas.    |
| Preference for indigenous crafts      | Consumers with Aboriginal Australian ancestry value items made through traditional craftsmanship.                                                |

## Boomerang Making: Market Dynamics

| Particular                            | Description                                                                                                  |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------|
| Aboriginal Heritage and Tradition     | Boomerangs are more than recreational hunting tools, also depicting mythological scenes and cultural motifs. |
| Cultural authenticity over replicas   | Consumers seeking cultural authenticity due to growing interest in Aboriginal culture                        |
| Niche market, limited demand          | Steady but limited demand outside of Aboriginal Australian heritage events                                   |
| Declining number of skilled craftsmen | Fewer active artisans are commercially available, increasing production times                                |



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# Mulga Carvings



Image source: <https://www.carters.com.au/index.cfm/index/2124-mulga-wood/>



## Mulga Carvings: Design and Production Process

| Value Additions       | Description                                                     | Usage            | Dependency          |
|-----------------------|-----------------------------------------------------------------|------------------|---------------------|
| Wood Selection        | Choosing sturdy, appropriate pieces of Mulga wood.              | Fixed amount     | Raw materials       |
| Initial Shaping       | Rough carving and shaping using saws and knives                 | Custom amount    | Artisanal tool      |
| Detailing & Carving   | Intricate details carved to depict cultural symbols.            | Single item only | Cultural Traditions |
| Polishing & Finishing | Polished and stained to bring out the natural grain of the wood | Single item only | Artisan skill       |

## Mulga Carvings: Distribution Channels

- Museums and Art galleries
- Online niche art marketplaces
- Cultural groups and Art societies



## Mulga Carvings: Consumer Behaviour

| Particular                       | Description                                                                                                                                   |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Engaging with Indigenous stories | Buyers with Aboriginal ancestry want to engage with cultural narratives                                                                       |
| Desire for sustainable artwork   | Environmental factors drive interest in sustainably produced carvings                                                                         |
| Price Sensitivity to Mulga wood  | Consumers are unwilling to pay a premium for carvings made of Mulga, as carvings made from synthetic materials are affordable and accessible. |

## Mulga Carvings: Market Dynamics

| Particular                                          | Description                                                                                      |
|-----------------------------------------------------|--------------------------------------------------------------------------------------------------|
| Revival of interest in Indigenous art               | Due to its sustainable nature and ethical sourcing, Mulga carvings are slowly gaining popularity |
| Limited number of skilled artisans currently active | Few artisans create enough supply to meet growing global demand                                  |
| Lack of high quality Mulga wood                     | Creating sturdy pieces of Mulga carvings demands consistent supply of wood                       |





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# Pandanus Basketry

Image source: <https://marrawuddi.com.au/product/405-24-pandanus-basket/>



## Pandanus Basketry: Design and Production Process

| Value Additions  | Description                                                    | Usage            | Dependency    |
|------------------|----------------------------------------------------------------|------------------|---------------|
| Leaf Harvesting  | Pandanus leaves are harvested and stripped of fibers           | Fixed amount     | Raw materials |
| Leaf Preparation | Leaves are soaked in natural materials before dyeing           | Custom amount    | Artisan skill |
| Dyeing           | Mixed with dyes made from native plants, berries, and roots    | Batch capacity   | Raw materials |
| Weaving          | Strips are woven into tight patterns to create durable baskets | Single item only | Artisan skill |

## Pandanus Basketry: Distribution Channels

- Indigenous art galleries
- Cultural art markets
- Festivals of Aboriginal people



## Pandanus Basketry: Consumer Behaviour

| Particular                                   | Description                                                                                               |
|----------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| Interest in handwoven, eco-friendly products | Consumers value handmade and sustainable production processes                                             |
| Cultural significance and authenticity       | Purchasers want authentic Aboriginal-sourced Pandanus pieces                                              |
| Perceived lack of fashionability             | Due to a perception of being less fashionable compared to other traditional items, it has less preference |

## Pandanus Basketry: Market Dynamics

| Particular                | Description                                                                |
|---------------------------|----------------------------------------------------------------------------|
| Cultural storytelling     | Storytelling traditions drive the sale of these highly personalized items. |
| Indigenous art forms      | Appreciation for decorative utility items of Aboriginal heritage.          |
| Limited mainstream demand | Poor reach outside of indigenous urban centers limits the market scope.    |



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# Kete Basketry



Image source: <https://collection.pukeariki.com/objects/107028/kete-basket>



## Kete Basketry: Design and Production Process

| Value Additions  | Description                                                       | Usage            | Dependency          |
|------------------|-------------------------------------------------------------------|------------------|---------------------|
| Flax Harvesting  | Collecting long, sturdy flax leaves appropriate for basket making | Bulk volume      | Raw materials       |
| Leaf Preparation | Flax is stripped into thin fibers using traditional methods       | Fixed amount     | Artisan skill       |
| Dyeing of fiber  | Readied leaves are coloured using traditional dyeing methods      | Custom amount    | Artisan skill       |
| Basket Weaving   | Fibers are woven into intricate patterns to form the basket       | Single item only | Cultural Traditions |

## Kete Basketry: Distribution Channels

- Cultural stores
- Online artisan platforms
- Maori festivals



## Kete Basketry: Consumer Behaviour

| Particular                                | Description                                                                                                  |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| Appreciation of Heritage and Authenticity | The spiritual and cultural significance of Maori basket weaving and mythological narratives in their motifs. |
| Growing cultural pride in Maori heritage  | Purchasers of Maori-ancestry want to connect with their Maori heritage                                       |
| Niche market for handmade Maori items     | Consumers appreciate the labor-intensive and unique pieces                                                   |

## Kete Basketry: Market Dynamics

| Particular                              | Description                                                                |
|-----------------------------------------|----------------------------------------------------------------------------|
| Limited demand beyond Maori communities | High demand in Maori communities but limited exposure outside New Zealand  |
| Inconsistent Supply throughout the year | Artisan shortages and time-intensive production limits consistent supply   |
| Slow Production can not meet demand     | Slow production hampers capacity to meet consistent demand across the year |





# Thank You

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