



Willow Coffins Production: Accessing the Market

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1. Introduction

With the decline in church attendances over the last few decades, and the growth in environmental awareness, many people are choosing alternatives to the traditional burial and are personalising their funerals by following approaches that leave less of an impact on nature. These 'green' or 'natural' burials are often in woodlands or meadows set aside as natural burial grounds. They involve ceremonies that are intensely personal to the deceased and use products that biodegrade easily and are produced with less impact on natural resources. At natural burial grounds all products buried must be fully and easily biodegradable, graves are often not marked and the ground is not always consecrated. These relatively recent developments in the funeral market have generated new opportunities for funeral professionals and the products they offer.

Willow coffins have been around for a long time but have enjoyed a resurgence in popularity as a widely accessible alternative to traditional wooden coffins. They offer personalisation, affordability and fulfil the green credentials necessary for 'natural burial' as willow is a sustainable material that is used untreated. A number of high profile celebrities have recently been buried in willow coffins which has done a great deal to raise the products' profile

1.1 Background

Cambrian Mountain Willow (CMW) began trading in autumn 2006. An opportunity arose for Robert Luxton (Sole trader) to take over the management of willow coppice fields that had been planted in 2000 and 2002. These fields contain over 60 varieties of willow that have a range of uses and therefore can supply to a number of markets. These include structural willows suitable for bio-engineering (erosion control, bank stabilisation and bio-remediation), landscaping and live garden structures and sculptures as well as varieties suitable for traditional weaving, as garden ornamentals, biomass fuel and as hedging.

The majority of sales fulfilled by CMW involve live willow ready and prepared for re-planting. This makes the business an acutely seasonal activity. Winter and early spring is harvest and re-planting season and is therefore the time when the majority of the business is done. Summer and Autumn are mainly spent maintaining the fields and running courses. To develop CMW into a business that can generate sales all year round it is important to:

- (1) Utilise the willow crops already grown by CMW.
- (2) Take advantage of local skills and expertise.
- (3) Identify an emerging market that CMW could feasibly exploit.

After much thought about possible avenues to follow (these included Willow garden fencing, baskets, garden structures and play structures for children), it was decided that further detailed investigation into the production of willow coffins offered the greatest opportunity to develop a profitable and sustainable second branch to CMW.

The purpose of this study is, therefore, to investigate the feasibility of producing, marketing and selling willow coffins from a workshop in Powys. This report aims

specifically to:

- (a) Investigate the current place of willow coffins within the coffin market
- (b) Identify competitors
- (c) Identify the customers and the route to selling
- (d) Objectively assess the feasibility of such an enterprise.

2. Methodology

A broad review of available products was initially undertaken using a combination of desk and web research. This was then followed up with the formulation of a questionnaire (Appendix 1) directed at two of the most important routes to supply, green/ natural burial site managers and undertakers. The surveys were conducted over the phone and were restricted to Wales. Initially businesses in Powys were interviewed and then the survey was extended to larger population areas in Wales such as Swansea and Cardiff. An attempt was made to contact 50 funeral professionals, however in the time allowed the total number contacted was 35 of which 14 were able to give good information. The focus of the questionnaire investigated sourcing, pricing, the proportional demand for willow coffins in comparison to other products on the market, the demand for green burials, customers' demographic and their reactions to 'environmentally friendly' and 'locally made' / 'made in Wales'. The questionnaire also looked at opinions on coffin design and how the market was developing. Finally, confirmation was sort from each interviewee that they would be interested in offering any future products to customers. Results were then collated. It was found that interviews sometimes developed into a wider discussion during which extra and anecdotal information was offered that proved very useful.

3. Assessment of Market

3.1 Natural Burial Statistics

- 63% of people in the UK like the idea of environmentally friendly coffins
- 64% of the UK adult population like the idea of green funerals
- Since 1993 the number of natural burial sites in the UK has grown from 1 to now over 200
- Green and woodland burials account for over 5000 burials each year in the UK. This figure is growing.
- Some new natural burial sites have planning for several thousand burials.
- The growth of this sector is monitored and in some part regulated by the Association of Natural Burial Grounds and the growing popularity of this form of funeral is reflected in the existence of the Natural Death Centre.

Information above from; Mintel Market Research (The Mintel report, 2007 considers the growth and development of non-traditional funerals which are responding to changes in consumer attitudes to death and to funerals) and The Natural Death Handbook, 2003.

3.2 Product Competition

The market is at its simplest split into two choices, 'traditional wooden coffins' (within which there is a great deal of choice and range of cost to the customer) and 'alternative coffins'. Alternative choices are varied and are usually chosen over some concern for the environment as they involve the use of fewer resources and contain materials that will more easily biodegrade. They include

Shrouds - The body is wrapped in a simple or decorated material such as cotton or felt. These are used to wrap bodies both before they are laid into a coffin or as an alternative to a coffin.

Cardboard Coffins - A simple and cheap option that allows the coffin to have a traditional shape and to be decorated (painted) to follow the requests of the deceased or the family. Funeral directors are not entirely happy with the perceived flimsiness of these products.

Bamboo / Grass coffins - These have a traditional shape but either the materials or the products themselves are imported over long distances reducing their eco-credentials.

Willow Coffins - Willow coffins are available in a selection of shapes that range from traditional coffin shapes to those with rounded ends, rectangular and pod shaped. A great many of these are imported from Asia and Eastern Europe but there are a number of companies based in the UK producing on both a large scale and individuals that make to order on a small scale.

Other products include eco-pods made of papier mache or KEP (biodegradable with cellulose fibres).

3.3 Overview of UK Made Willow Coffin Competition

Below are listed the main coffin producers and suppliers in Britain. Makers advertise through funeral trade catalogues and publications as well as through websites some attend trade shows. Prices below are for adult coffins. **It is of interest to note that none of the business mentioned below are based in either Powys or Wales.**

*The Somerset Willow Company – These offer both imported and British made coffins (retail £350 - £390) with cotton liners as extra (£35)

*Peace Funerals – offer the Mawdsley coffin (retail @ £400)

*Environmental Coffins (£350-400 retail)

*Tony Carter - Willow Chrysalis Coffins (£350-400 retail)

A few companies offer British willow coffins as part of a wider business and prices can reach as high as £785 retail (The woodland and wildlife conservation Co.) Other British coffin makers exist but it is treated as a very low key affair and products are made to order on request. At the moment large importers such as SAWD Partnership and Earth to Heaven offer only imports

3.4 Results of Questionnaire

3.4.1 Current Market Information

* The first important result is that Green burial sites do not usually supply coffins to customers. They often act as an information service and advertise where (often web sites) customers can go to source a selection of products. The vast majority of willow coffins used in natural and traditional burial is sold through local funeral directors. Funeral directors in Powys report a relatively low demand with most supplying only 1-2 willow coffins per year. The numbers sold tend to increase proportional to the density of population with directors in major population centres such as Cardiff and Swansea reporting sales as high as 20-40 per year.

* These sales include a mixture of imported and UK made willow coffins from makers and specialist wholesalers. Imported coffins can be purchased by directors at prices from £180 to £240 whereas UK made coffins wholesale for £300 - £400. These prices usually include delivery and directors tend to expect next day delivery. There was often some uncertainty among funeral directors about the origin of the coffins they sold.

* Numbers of burials at green/natural sites ranged from around 5-15 per yr at smaller sites to over 100 per yr in larger urban areas where natural burial sites are occasionally linked to (or on the same site as) conventional cemeteries.

* Despite there being a lot of press articles and other popular literature that describe 'do it yourself' green funerals, it is clear from our interviews that these are rare if non-existent in some regions. Typically our surveys found that between 95 - 100% of funerals at green sites are handled by undertakers. There was a clear cultural divide here with some rural undertakers having not even heard of 'green burials' and urban areas being far more informed about the choices available.

* Natural burial sites report a fairly consistent result of between 50 - 70% of burials they deal with will use a willow coffin whereas at traditional cemetery funerals the figure is below 5%.

3.4.2 Marketing Considerations

* Businesses report that generally there is no strong age related trend when choosing a green burial and those customers come generally from the surrounding area, although, because of the comparatively low numbers of green sites, particularly in Wales, a small selection does come from long distance.

* There was no particular consensus from green site managers or funeral directors on whether people's decision to have an alternative burial was ethically based or not. Other reasons included a liking for a more peaceful and beautiful location and no grave maintenance. It was clear that cost was not a consideration.

* Most managers at green sites were uncertain as to whether having products advertised as 'locally made' or 'made in Wales' would increase sales of these items. Reactions ranged from very positive to don't know. The reaction was far more positive from funeral directors and funeral organisers. One in particular (Lovingly Managed, who operate from three bases in South Wales) have a policy of offering and promoting locally made products whenever possible.

* The majority of professionals spoken to in the survey consider that the market for

alternative funerals and the associated products such as willow coffins will only grow in the future

3.4.3 Willow Coffin Design

* Generally funeral directors were pleased with the quality of willow coffins on offer, however below is a list of concerns raised.

- (a) Willow coffins are noisy (creaking when lifted)
- (b) Handle positions cause knuckles to rub against the willow
- (c) Deceased can be seen through the sides. There is a strong contrast in colour between the willow and often white shroud or liner. One undertaker lines the willow coffins with cardboard to screen off the deceased within.
- (d) Willow coffins can get stuck on runners at crematoriums and within the hearse.

3.4.4 Willingness to Order

• The feeling was that as long as the quality is excellent and consistent, the service is good and the price is within range then funeral directors will be willing to offer a new range of willow coffins (made in Powys) to their customers. The support was strongest from those operating near to natural burial sites and those conducting business in dense population areas. Below are the details of businesses that gave the strongest support.

Businesses willing to offer new Powys made willow coffins to customers.

Purple Funeral Company, Powys/Herefordshire	01544 239143
J. Pidgeons and Sons Ltd, Cardiff	02920 226604
Rhymney Funeral Services Ltd, Cardiff	02920 797516
D. J. Evans, Machynlleth	01654 700006
R. G. Peate, Welshpool	01938 559256
Lovingly Managed, Cardiff/Bridgend/Newport	01446 774855

4. Discussion of Business Feasibility

For willow weavers, coffins offer a rare opportunity to make a product that has a high sale value and potential for consistent demand. It also offers the opportunity to build a team of workers and operate in a workshop situation where costs can be reduced as scale builds.

Although the survey conducted could not be considered comprehensive, as many funeral directors did not want to discuss the issues, the positive feed-back we received from those professionals that were embracing the challenges of change within the sector, and the fact that 50-70% of natural burials involve willow coffins was very encouraging. Clearly, this is an emerging market that is nowhere near reaching its full business potential as green/natural burials only account for about 1% of the total burials in the UK per year and we have an increasingly informed, affluent and ageing population.

At this stage this report has shown that the best defined route to sales is through funeral directors that are based in densely populated regions. However, the development of a website as well as literature passed on through funeral directors could provide a less pressurised opportunity for customers to review their choices.

The biggest challenge appears to be competition from cheaper imported willow coffin suppliers. If quality is high and consistent it appears that price is far less of an issue particularly for those planning their own funerals. In these cases the more personalised the appearance of the products the more fulfilling the process of funeral planning can be. In order to capitalise on this trend it will be important to add value to coffins by offering a product that stands out from the 'plain' look of imported designs.

Again in more populous areas 'Made in Wales' marketing could have a positive effect particularly were people arrange their own funerals or families put decisions in the hands of professional organisers.

Coffin design is vital! The design must be cost effective, reliable and consistent, offer added value through shape, colour and weave patterns and be marketed effectively. It must overcome concerns raised that are possible to address (creaking is unlikely to be solved). Equally the service provided in terms of safe and reliable delivery must be as good as other suppliers who offer next day delivery.

It is important not to confuse the business of making coffins and getting involved with bereavement. For this reason a lot of thought must be given to remaining remote and reliant on professionals skilled and experienced in dealing with the sharp end of the funeral sector. Dealing with the bereaved direct could result in misunderstandings and disappointment and could easily be avoided by choosing to work through bereavement professionals. However, always supplying through funeral directors will reduce the price attainable for each item.

Overall, the feasibility of producing, marketing and selling willow coffins from a production base in Powys is positive and will rely on quality, design, cost effectiveness and marketing. These are not mutually exclusive and it will require a determined development stage in order to strike a balance between the above in order to make a profit and succeed as a viable business.

5. Appendix 1: Questionnaire for Funeral Professionals

BUSINESS NAME
CONTACT NAME
CONTACT NO.

1. Do you sell willow coffins to customers or do you direct people to suppliers?
2. Where or who do you source them from and are these originally made in the UK or imported?
3. Optional question. - How much do you buy willow coffins produced in UK and imported?
4. How many green burials are you involved in annually?
5. What percentage of your green and conventional burials uses willow coffins?
6. How popular are willow coffins in comparison to cardboard / bamboo / grass / shroud / wood?
7. Demographic / Does it tend to be younger people opting for green burial / willow coffins?
8. Are people’s decisions about green burial arrangements mainly cost based, ethically based or a matter of making a personalised choice?
9. What are people’s reactions to 'locally made', 'made in Wales' products? Would a tag like this help to generate sales?
10. How do you see the coffin market developing?
11. Do you have any particular problems with the structure and design of willow coffins? Any suggestions.
12. When quality willow coffins are produced in Powys would you be interested in placing orders from us or advertising our coffins to your customers?

Many thanks
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on behalf of GLASU Powys County Council 01982 552224