



International Trade of Bamboo and Rattan in China in 2017





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Introduction

Bamboo and rattan are two of the most important non-wood renewable resources, offering a unique suite of characteristics, high economic value and a wide range of applications. The bamboo and rattan industry plays an important role in providing employment opportunities and increasing farmers' income, contributing to poverty alleviation and the development of the local economy. An enormous variety of products can be made from bamboo and rattan, especially that bamboo has over 10,000 estimated uses for construction, decoration, furniture, paper, packaging, transportation, medicine, food, textiles and chemicals.

Globally, China has the greatest abundance of bamboo resources. With an estimated six million hectares of bamboo forests covering 40 genera and 500 species, China is the leading country in terms of the diversity of bamboo species and extent of bamboo forest area. It is the largest producer and exporter of bamboo and rattan products.

According to estimates made by the Chinese Bamboo Industry Association, the total output value of China's bamboo industry in 2016 was USD 31.8 billion (RMB 210.6 billion). According to the China Bamboo Industry Development Plan, the total output value of the Chinese bamboo industry by 2020 will reach USD 48 billion and employ 10 million people.

Aside from bamboo, China has some 300,000 hectares of natural rattan resources consisting of 4 genera and 41 species. The annual production of wild rattan ranges from 4000 to 6500 tonnes. In southern and southwestern China, there are only 5000 hectares of rattan plantations, and because of the shortage of rattan resources, China's annual import of rattan resources from Southeast Asia ranges from 30,000 to 40,000 tonnes.

China's rattan industry has a history of more than 150 years. Today, the main rattan products include rattan furniture, rattan seats, curtains, baskets and handicrafts. With more than 150,000 people employed by the rattan industry, it plays an important role in promoting regional economic development.

As China continues to undergo a shift from high-speed growth to high-quality development in its economy, the function of domestic demand in promoting market growth will be stronger, and foreign demand growth will be increasingly moderate. In the meantime, China's foreign trade will also transition from massive imports and exports to quality imports and exports.



1. Imports and exports of bamboo and rattan products in China, 2017

In 2017, China's total international trade volume of forest products reached USD 150.05 billion, representing a year-on-year increase of 10.1 per cent. In particular, the export value reached USD 74.65 billion, with an increase of 1.4 per cent, and the import value stood at USD 75.4 billion, with an increase of 20.1 per cent. In other words, imports and exports accounted for around half of the total trade volume, with imports increasing significantly and exports growing slowly. The major constraints in China's export growth of forest products come from two aspects: trade protection actions, such as anti-dumping and anti-subsidy and the measures of developed countries to improve products' environmental protection standards, and active competition from developing countries for an international market share.

According to trade data from China Customs, China's exports of bamboo and rattan products were approximately USD 2.08 billion ^① in 2017, representing an increase of 6 per cent compared with that in the previous year. As shown in Figure 1.1 below, exports of bamboo tableware were estimated at about USD 782 million, accounting for 38 per cent of the total exports. Exports of industrialised bamboo products, including bamboo flooring, bamboo plywood and bamboo building materials, were about USD 375 million, accounting for 18 per cent of the total. Exports of traditional bamboo products made from bamboo shoots were about USD 297 million, accounting for 14 per cent of the total exports, and the export value of woven bamboo products was about USD 283 million, accounting for 14 per cent. The proportions of exports of bamboo and rattan furniture (5 per cent), BR raw materials (4 per cent), woven rattan products (3 per cent) and bamboo charcoal (2 per cent) were relatively small.



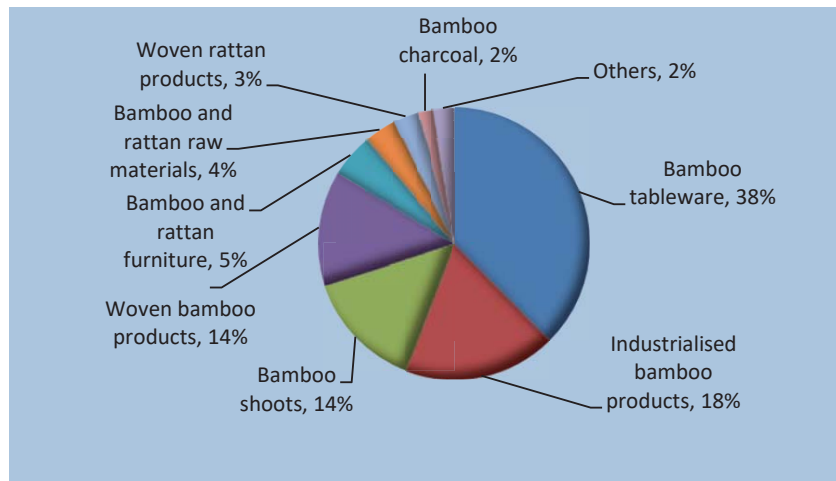


Figure 1.1. China's exports of bamboo and rattan products in 2017

China's imports of bamboo and rattan products were estimated at about USD 37 million in 2017, representing an increase of 40 per cent from the previous year. As shown in Figure 1.2 below, BR raw materials accounted for the greatest proportion of imports, at 52 per cent of the total. The import value of BR furniture totalled USD 3.5 million, equivalent to 9 per cent of the total, whereas BR woven products and bamboo tableware accounted for 9 per cent and 5 per cent of the imports, respectively.

Because of the shortage of natural rattan resources, China imported USD 18 million worth of rattan cane in 2017, accounting for 51 per cent of the total imports. Imported rattan cane plays an important role in meeting the development of China's rattan industry.

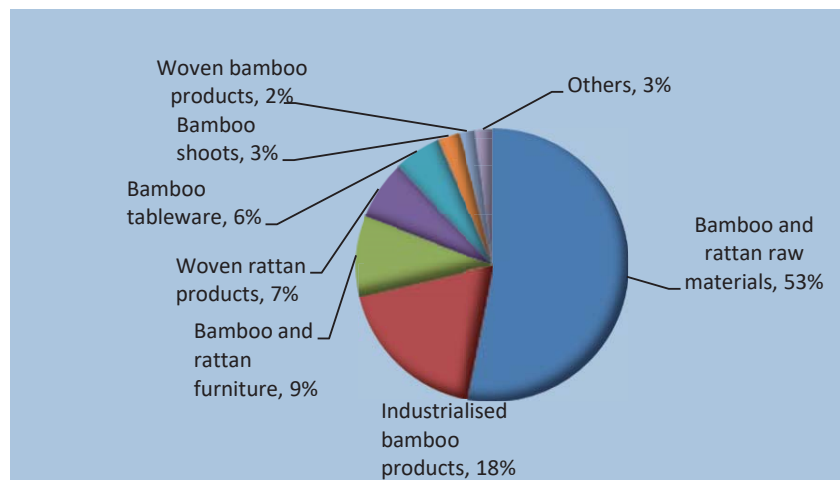


Figure 1.2. China's imports of bamboo and rattan products in 2017



2. Trade flow of bamboo and rattan in China, 2017

As China is a key global exporter and importer of bamboo and rattan products, the country's import and export structure and trends in the trade of bamboo and rattan products can influence the development direction of the international bamboo and rattan market. As shown in Table 2 (see the Appendix), the USA is China's largest trading partner for bamboo and rattan products.

In 2017, the trade value of bamboo and rattan products exported by China to the USA was almost USD 519 million, accounting for 25.0 per cent of China's total exports. This was followed by the EU and Japan, accounting for 20.4 per cent and 15.0 per cent of the total exports, respectively. The fourth to tenth largest importers of Chinese bamboo and rattan products were Taiwan, Australia, the UK, Malaysia, South Korea, India, and Singapore, respectively (see Table 2 in the Appendix).

In terms of trade partners that are exporters of bamboo and rattan products to China, Malaysia replaced Indonesia in 2017 to become China's largest trading partner. China's imports of bamboo and rattan products from Malaysia amounted to approximately USD 14.8 million, accounting for 39.8 per cent of China's total imports, followed by the EU, with a trade value of about USD 5.8 million and a share of 15.5 per cent. The third largest exporters to China are Vietnam, the Philippines and Indonesia, with a trade value of about USD 3.5 million and accounting for around 9 per cent each of China's total imports. These were followed by Taiwan, Myanmar and Japan (see Table 3 in the Appendix).



3. International trade trends of bamboo and rattan products in China, 2007–2017

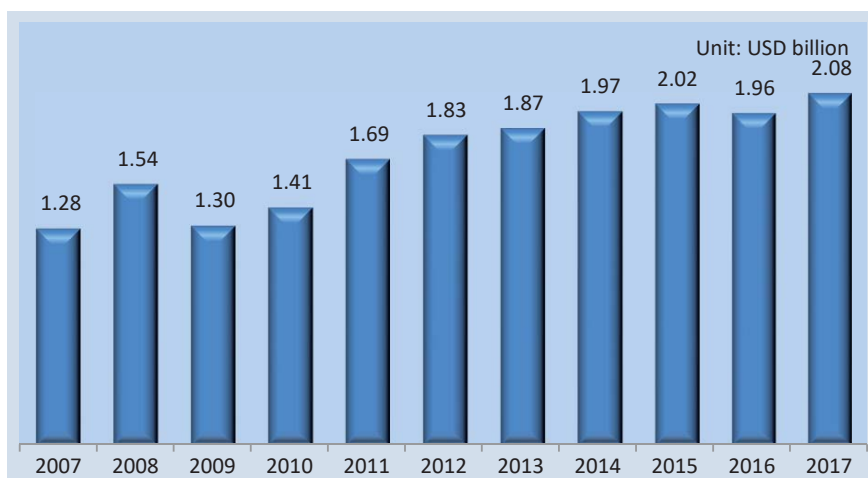


Figure 3.1. Export value of bamboo and rattan products from China to the world, 2007–2017

In the recent decade, China’s trade volume of forest products has continued to grow. The most remarkable changes are evident in the worldwide exports of wooden furniture, paper products, plywood, and paper and paperboards, which have increased by 13.8 per cent, 11.6 per cent, 8.5 per cent and 5.0 per cent, respectively. World imports of raw timber, sawn timber and wood pulp have also increased obviously by 18.7 per cent, 17.4 per cent and 16.1 per cent, respectively. Presently, China takes up as much as one third of the world’s export of plywood and wooden furniture, one fifth of the export of either woodworks or paper products, one eighth of the export of fibreboards and fibre pulp and one tenth of the export of veneers.

Figure 2.1 above shows that the export value of bamboo and rattan products from China grew from USD 1.28 billion in 2007 to USD 2.08 billion in 2017, representing an increase of over 62 per cent. During this period, the varieties of bamboo and rattan products exported by China also increased from 25 to 28 categories. In terms of the trade value of traditional export products, exports of bamboo shoots increased by 53 per cent, and BR furniture exports increased by 172 per cent. Of particular significance was that more industrialised bamboo products emerged, including bamboo flooring, bamboo veneer, bamboo tableware and bamboo building materials, and the net export value increased by USD 7.46 billion.

From 2007 to 2017, the bamboo and rattan import market in China showed an overall downturn, and it was a period of great market volatility.

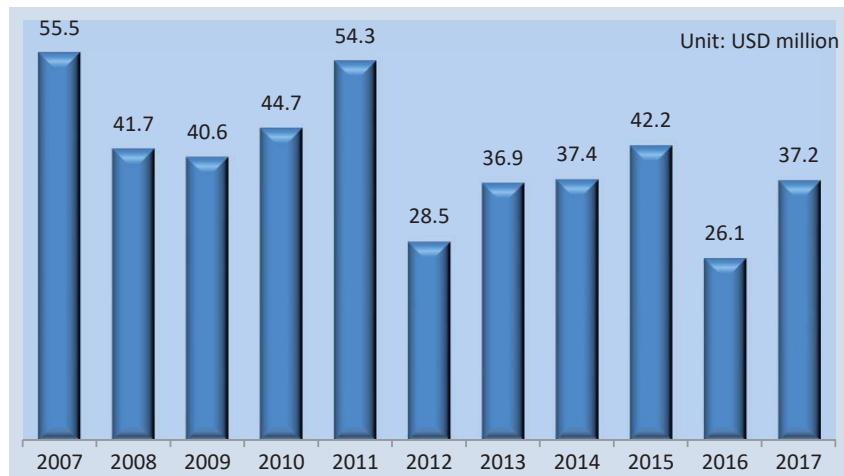


Figure 3.2. China's imports of bamboo and rattan products from the world, 2007–2017

In 2017, the top bamboo and rattan product imported by China was rattan cane, which accounted for a relatively stable share of 70 per cent before 2016, but which dropped to about 50 per cent in 2017.



Conclusion

The environmental and social costs of economic growth should not be overlooked. To meet mankind's increasing needs, we must produce more quality products by using fewer clean resources. The concepts of sustainable development, green development and cyclic development will need to be accepted more widely.

Bamboo and rattan are two of the most important non-wood renewable resources. Globally, China has the greatest abundance of bamboo and rattan resources, and it is the largest producer and exporter of bamboo and rattan products.

The export value of bamboo and rattan products from China grew from USD 1.28 billion in 2007 to USD 2.08 billion in 2017. The variety of bamboo and rattan products continued to increase throughout this period, and the proportion of industrialised products also grew. The main importers of Chinese bamboo and rattan products are the USA, EU, and Japan, followed by a range of developed and developing countries and regions. Malaysia and Indonesia are the first and second largest exporters of bamboo and rattan products to China, respectively.

China has a shortage of natural rattan resources. In 2016, China's import value of rattan cane reached USD 14 million, accounting for 55 per cent of the total imports of bamboo and rattan materials. Rattan cane plays an important role in supporting the development of China's rattan industry.

China's bamboo and rattan industry will continue to develop, increasing its resource efficiency, producing a greater proportion of high value added products and shifting towards the use of low-carbon, green and environment-friendly models. Bamboo and rattan products will also play an increasingly important role in replacing traditional industrial materials, such as hardwood, cement and plastics, and in promoting energy savings and emissions reductions, thus enriching the international trade market and promoting sustainable development.

Appendix

Table 1. International trade of main bamboo and rattan products in China in 2017

Unit: USD thousand

Product	Export	Import	Product name	Export	Import
Bamboo tableware	450,374	1812	Bamboo flooring	59,689	129
Bamboo sticks	331,917	283	Bamboo fibre	37,340	713
Bamboo board	314,845	6658	Bamboo charcoal	36,357	361
Bamboo shoots	297,354	967	Bamboo pulp/paper articles	14,007	35
Woven bamboo products	283,316	650	Rattan furniture	12,285	2943
Bamboo furniture	96,763	588	Rattan plaits	5070	18,513
Bamboo poles	74,848	966	Bamboo carvings	53	0
Woven rattan products	62,755	2590			
Total	2,076,974	37,209			

Table 2. China's main bamboo and rattan export partners in 2017

Unit: USD thousand

Rank	Importers	Trade value	Rank	Importers	Trade value
1	USA	519,290	11	Vietnam	36,637
2	EU	424,040	12	Thailand	34,571
3	Japan	310,975	13	Hong Kong, China	33,496
4	Taiwan, China	77,702	14	Canada	28,243
5	Australia	62,604	15	Russia	26,708
6	UK	57,422	16	Turkey	26,537
7	Malaysia	56,810	17	Indonesia	25,357
8	South Korea	54,377	18	Brazil	24,658
9	India	52,688	19	Israel	24,242
10	Singapore	43,089	20	Iran	20,431
	Others	137,096			
	Total	2,076,974			

Table 3. China's main bamboo and rattan import partners in 2017

Unit: USD thousand

No.	Exporters	Trade value	No.	Exporters	Trade value
1	Malaysia	14,798	11	Singapore	373
2	EU	5785	12	UK	261
3	Vietnam	3580	13	Thailand	180
4	Philippines	3364	14	USA	161
5	Indonesia	3232	15	North Korea	122
6	Taiwan, China	1913	16	South Korea	88
7	Myanmar	1035	17	Nepal	82
8	China	863	18	Australia	55
9	Japan	771	19	Russia	26
10	Croatia	459	20	Laos	22
	Others	38			
	Total	37,209			

Table 4. International trade of bamboo and rattan between China and the USA in 2017

Unit: USD thousand

Product	From China to USA	From USA to China	Product	From China to USA	From USA to China
Bamboo board	176,192	83	Woven rattan products	14,202	
Bamboo tableware	90,470	55	Bamboo poles	9112	2
Woven bamboo products	58,432	3	Bamboo pulp/paper articles	5302	
Bamboo flooring	50,374		Bamboo charcoal	1152	
Bamboo shoots	42,507		Rattan furniture	502	7
Bamboo sticks	35,853	7	Bamboo fibre	411	
Bamboo furniture	34,596	3	Rattan plaits	187	
Total	519,290	161			

Table 5. International trade of bamboo and rattan between China and the EU in 2017

Unit: USD thousand

Product name	From China to EU	From EU to China	Product name	From China to EU	From EU to China
Bamboo tableware	92,935	41	Woven rattan products	22,791	7
Woven bamboo products	69,166	21	Rattan furniture	7865	50
Bamboo shoots	58,334	0	Bamboo flooring	3349	
Bamboo sticks	57,494	3	Bamboo pulp/paper articles	3216	16
Bamboo board	41,726	5,621	Rattan plaits	2064	0
Bamboo furniture	36,657	25	Bamboo charcoal	1165	
Bamboo poles	26,331	0	Bamboo fibre	941	1
Total	424,040	5,785			

Table 6. International trade of bamboo and rattan between China and Japan in 2017

Unit: USD thousand

Product name	From China to Japan	From Japan to China	Product name	From China to Japan	From Japan to China
Bamboo shoots	144,714		Woven rattan products	3435	1
Bamboo tableware	89,555	229	Bamboo furniture	2599	11
Bamboo sticks	27,518	30	Rattan plaits	616	
Woven bamboo products	26,340	100	Bamboo flooring	220	0
Bamboo charcoal	5690	7	Bamboo pulp/paper articles	200	
Bamboo board	5649	84	Rattan furniture	164	0
Bamboo poles	4230	5	Bamboo fibre	45	304
Total	310,975	771			

Table 7. International trade of bamboo and rattan between China and Malaysia in 2017

Unit: USD thousand

Product name	From China to Malaysia	From Malaysia to China	Product name	From China to Malaysia	From Malaysia to China
Woven bamboo products	20,309		Rattan furniture	280	
Bamboo sticks	17,690		Rattan plaits	265	14,663
Bamboo board	8710		Bamboo pulp/paper articles	220	
Bamboo tableware	3581		Bamboo furniture	156	
Woven rattan products	3500	0.70	Bamboo charcoal	56	
Bamboo poles	1045		Bamboo flooring	35	128
Bamboo shoots	935		Bamboo fibre	29	
Total	56,810	14,798			

Table 8. International trade of bamboo and rattan between China and Indonesia in 2017

Unit: USD thousand

Product name	From China to Indonesia	From Indonesia to China	Product name	From China to Indonesia	From Indonesia to China
Bamboo sticks	19,782	0.4	Bamboo charcoal	58	5
Bamboo fibre	2599		Bamboo pulp/paper articles	55	
Bamboo tableware	1911	1.1	Bamboo furniture	31	61
Bamboo board	366		Rattan furniture	15	2146
Woven bamboo products	302	10.2	Woven rattan products	6	967
Bamboo poles	119	0.6	Rattan plaits		41
Bamboo shoots	112				
Total	25,357	3,232			



The International Bamboo and Rattan Organisation (INBAR) is the multilateral development organisation of 43 Member States for the promotion of bamboo and rattan. INBAR supports its members to include bamboo and rattan in their sustainable development action plans and green economy strategies. It promotes innovative ways of using bamboo and rattan to improve rural livelihoods, protect the environment, address climate change and issues of international bamboo and rattan trade and standards. INBAR connects a global network of partners from government, private and NGO sectors to promote a global agenda for sustainable development using bamboo and rattan.