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# Trade Overview 2018

## Bamboo and Rattan Commodities in China

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## **The International Bamboo and Rattan Organisation**

INBAR, the International Bamboo and Rattan Organisation, is an intergovernmental organisation bringing together 46 countries to promote the use of bamboo and rattan for sustainable development.

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## **International Bamboo and Rattan Organisation**

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Data source: China Customs

## Introduction

Bamboo, the fast-growing grass plant, and rattan, the spiky climbing palm, are widely distributed across Africa, Asia and Latin America. They grow quickly, mature within a few years and have a wide range of possible applications. Bamboo and rattan are important natural resources, and many people in bamboo- and rattan-producing regions of the developing world rely on these plants as a source of energy and livelihood.

Globally, China has the greatest abundance of bamboo resources. With an estimated 6.5 million hectares of bamboo forests (as of 2018) comprising 40 genera and 800 species, China boasts the world's largest bamboo forest area and bamboo diversity. It is also the leading producer of bamboo products. Bamboo has some 10,000 documented applications, and can be used as a material in construction, interior design, furniture, paper, packaging, medicine, food, textiles and chemicals. According to estimates made by the China Bamboo Industry Association, the total output value of China's bamboo industry in 2018 was USD 39.6 billion (RMB 280 billion).

In recent years, the advent of technological innovations, such as bamboo scrimber and bamboo fibre-based winding pipes, show the steps China's bamboo industry is taking towards higher resource efficiency, higher value addition, lower carbon emissions and greener, more environmentally friendly production. According to China's National Plan for the Bamboo Industry,<sup>1</sup> by 2020, China's bamboo industry will have a total output value of USD 43 billion and employ 10 million people.

Aside from bamboo, China has some 300,000 hectares of natural rattan-growing area, consisting of 4 genera and 41 species. The annual production of wild rattan ranges from 4000 to 6500 tonnes. In Southern and South China, there are only 5000 hectares of rattan plantations; because of this shortage of rattan resources, China imports around 30,000 to 40,000 tonnes from Southeast Asia annually.

China's rattan industry has a history of more than 150 years. Today, rattan is mainly used to make furniture, mats, curtains, baskets and handicrafts. With more than 150,000 people employed in rattan, the sector plays an important role in promoting economic development.

As China continues to shift from high-speed growth to high-quality development in its economy, domestic demand will have a stronger influence on market growth, and the impact of foreign demand will be more moderate. Increased uncertainty in international trade, including current trade tensions between China and the USA, may also drive a transition in China from massive imports and exports to a focus on high-quality imports and exports.

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<sup>1</sup> China's National Plan for the Bamboo Industry 2011 to 2020 is a comprehensive national strategy for bamboo sector development.

## 1. Bamboo and rattan imports and exports in China, 2018

Despite the considerable complications facing China's international trade in 2018, the country's foreign trade volume managed to reach a record high, breaking RMB 30 trillion's worth of annual imports and exports, and keeping China firm in its position as the global leader of trade in goods.

In 2018, China's total international trade volume of forest products reached USD 165.3 billion, representing a year-on-year increase of 10.7 per cent. Most notably, the export value of this sector reached USD 83.7 billion, with an increase of 11.4 per cent, and the import value stood at USD 81.6 billion, with an increase of 10.1 per cent. In 2018 exports increased by a significantly larger margin than the year before, a change partly attributable to fluctuations in traditionally competitive products including panels, and wood and bamboo furniture. Imports, by contrast, had an increase rate half as large as the previous year. As with 2017, in 2018 lumber, wood pulp and paper were the major imported commodities.

According to trade data from China Customs, China's export of bamboo and rattan products reached around USD 2.22 billion<sup>2</sup> in 2018, representing an increase of 7 per cent from the previous year. As shown in Figure 1 below, exports of bamboo tableware were estimated at about USD 930 million, accounting for 42 per cent of total exports. Exports of industrialised bamboo products, including flooring, plywood and building materials, amounted to USD 300 million, accounting for 14 per cent of the total. Exports of edible bamboo shoots were USD 310 million, accounting for 14 per cent of total exports, and the export value of woven bamboo products was USD 270 million, accounting for 12 per cent. Bamboo and rattan furniture, bamboo and rattan raw materials, woven rattan products and bamboo charcoal made up a relatively small proportion of exports, with no category accounting for more than 6 per cent of total exports.

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<sup>2</sup> There is a notable data discrepancy between data sources regarding China's bamboo and rattan trade. According to the UN Comtrade database, China exported about USD 1.18 billion of bamboo and rattan products in 2017. However, data sources from China Customs indicate USD 2.2 billion-worth for the same year. This difference of some RMB 1 billion may be due to the fact that China Customs has more individual HS codes for bamboo and rattan products, arguably offering a more accurate view of bamboo and rattan trade.

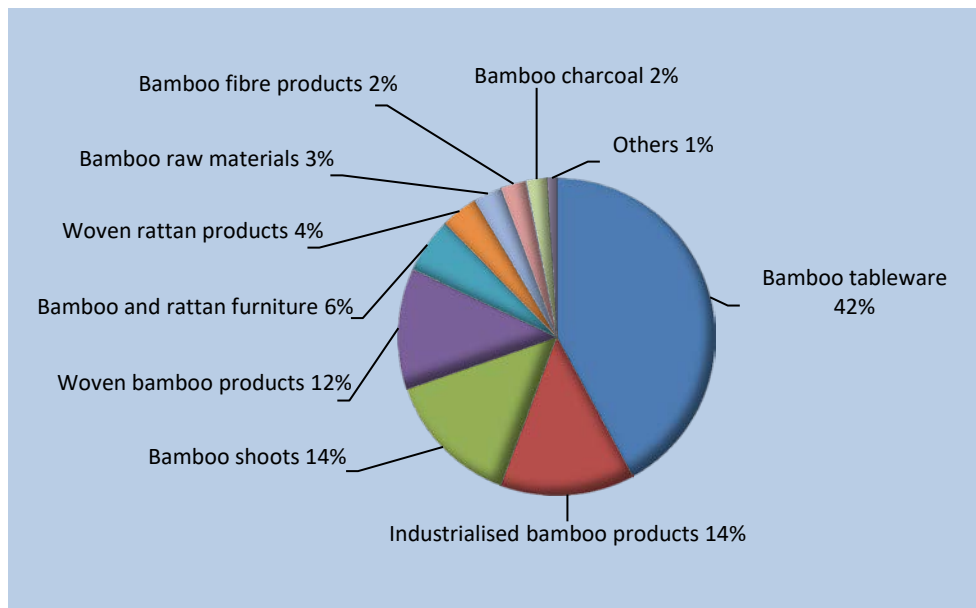


Figure 1. China's export of bamboo and rattan products in 2018

China's import of bamboo and rattan products was estimated at about USD 31 million in 2018, representing a decrease of 17 per cent from the previous year. As shown in Figure 2 below, bamboo and rattan raw materials accounted for the greatest proportion of imports, at 53 per cent of the total. The import value of bamboo and rattan furniture totalled USD 3.6 million, equivalent to 12 per cent of overall imports; bamboo and rattan woven products, bamboo-based panels, and bamboo tableware accounted for 12 per cent, 8 per cent, and 7 per cent of imports respectively. Because of its shortage of natural rattan resources, China imported USD 16 million-worth of rattan cane in 2018, accounting for 51 per cent of total imports. Imported rattan cane plays an important role in meeting the needs of China's developing rattan industry.

China's import and export of bamboo and rattan products corresponded to more general trends in its 2018 imports and exports: a modest increase for exports and a similar decline for imports. The growth in bamboo and rattan exports is noteworthy in the context of the ongoing China-US trade conflict and intensified anti-dumping and protectionist measures taken by some developed countries; it can be attributed to the Chinese government's policies to promote the steady growth of foreign trade and continue its policy of 'opening up'. The steady rise of domestic demand also contributes to this increase. The decrease in bamboo and rattan imports, meanwhile, can be explained partly by growing domestic supply and the enhanced competitiveness of domestic suppliers; however, it also reflects the more general transition of China's economy from growth in numbers to growth in quality.

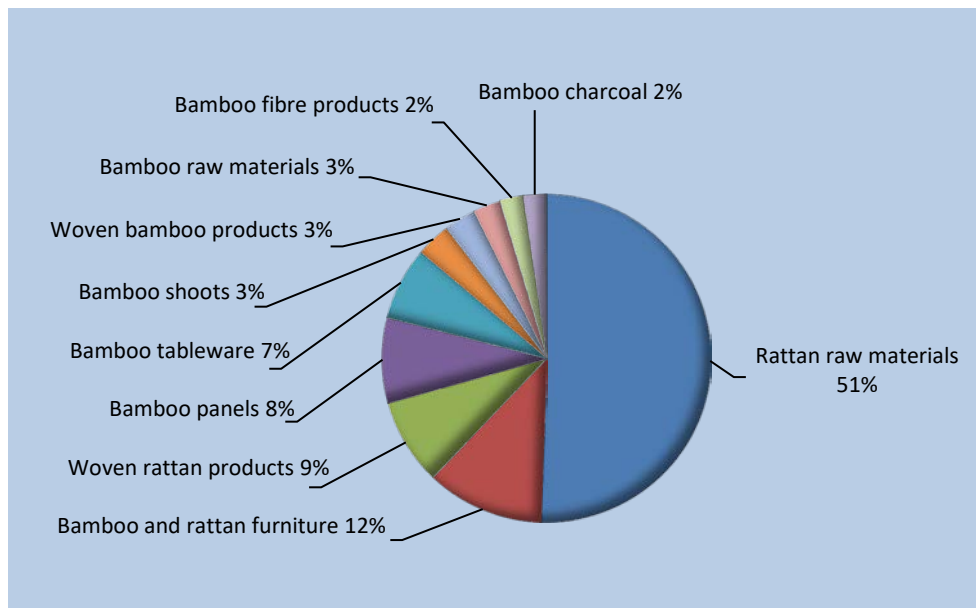


Figure 2. China's import of bamboo and rattan products in 2018

## 2. Trade flow of bamboo and rattan in China, 2018

As China is a key global trader 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 Annex), the EU is China's largest trading partner for bamboo and rattan products. In 2018, China exported USD 540 million-worth of bamboo and rattan products exported to the EU, accounting for 24 per cent of China's total exports. This was followed by exports to the USA and Japan, which accounted for 23 per cent and 15 per cent of the total, respectively. The next largest importers of Chinese bamboo and rattan products were Taiwan (China), Vietnam, India, South Korea, Australia, Thailand, and Canada, respectively (see Figure 3 below).

In terms of trade partners that export bamboo and rattan products to China, Malaysia was still China's largest trading partner in 2018. China's import of bamboo and rattan products from Malaysia amounted to approximately USD 11.4 million, accounting for 37 per cent of China's total imports, followed by Vietnam and Indonesia, with a trade value of about USD 3.8 million and a share of 12 per cent. The third largest exporter to China is the Philippines, with a trade value of about USD 3.6 million, accounting for around 12 per cent each of China's total imports. These were followed by the EU, Taiwan (China) and Japan (see Figure 3 below).

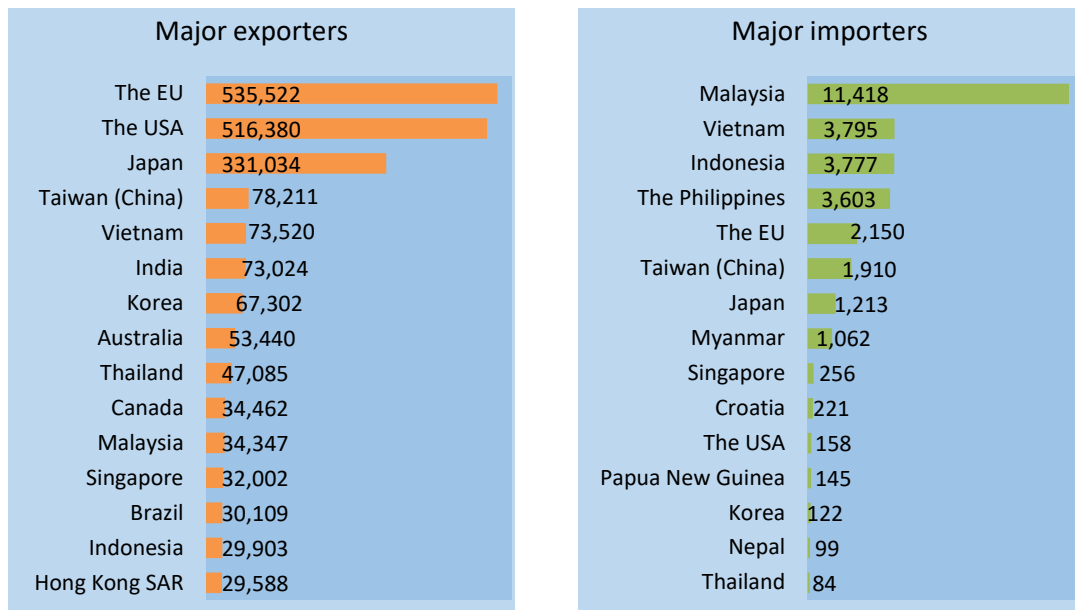


Figure 3. China’s major exporters and importers of bamboo and rattan products in 2018 (Unit: USD thousand)

Statistics shows that in 2018, China’s trade in forest products with Belt and Road<sup>3</sup> countries achieved a year-on-year growth of 4.7 per cent, accounting for 32 per cent of China’s total trade in this sector. The country’s trade in bamboo and rattan products also benefited from the progress made in forestry cooperation within the Belt and Road framework. Sustainable development and utilisation of overseas forest resources is a focus of the Belt and Road Initiative, and cooperation mechanisms with relevant key countries and regions have strengthened in recent years. In particular, ASEAN-China forestry cooperation has been established, and bilateral cooperative agreements signed with countries including Laos and Myanmar.

Over the last decade, the trade volume of China’s forest products has continued to grow. Currently, China provides one third of global exports of plywood and wooden furniture, as well as one fifth of woodwork and paper products, one eighth of fibreboard and fibre pulp and one tenth of veneers.

Figure 3 above shows that the export value of bamboo and rattan products from China from 2009 to 2018 has increased steadily; this rise was particularly sharp during the first few years of the decade, followed by a more moderate growth in recent years. Since 2014, the value of China’s exported bamboo and rattan goods has steadied at roughly USD 2 billion, registering a spike of over 70 per cent from 2009.

<sup>3</sup> The Belt and Road Initiative is the global development strategy adopted by the Chinese government in 2013 which promotes international infrastructure and trade links. Not all INBAR Member States take part in the Belt and Road Initiative.

### 3. Export trends of bamboo and rattan in China, 2009-2018



Figure 4. Export value of bamboo and rattan products from China, 2009–2018

During the period 2009 to 2018, 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 73 per cent, and bamboo and rattan furniture by 130 per cent. Notably, this period saw the emergence of highly processed, industrial bamboo products, including flooring, panels, tableware and construction materials. In 2018, China’s overall export value in this sector achieved a net increase of USD 920 million from that in 2009.

The stable rise in China’s export and import of bamboo and rattan products in the past ten years can be attributed to a number of factors. The main contributor is the timely, powerful stimulus package that the Chinese government put forward in response to the global financial crisis in 2008, which paved the way for the sector’s fast growth during the first five years leading to 2013. Secondly, China’s rapid economic growth in the past decade, and particularly the increasing contribution of domestic consumption to GDP, has benefited export and import trade. Thirdly, vacillations in the international trade environment had a limited effect on the foreign trade in bamboo and rattan products. In the next decade, as US trade policy is expected to grow more unpredictable and trade conflicts between the USA and China risk becoming a long-term issue, China’s trade in forest products, including bamboo and rattan products, will be more uncertain. However, overall, there is still a high probability that bamboo and rattan trade will maintain its trajectory of stable growth.

## Conclusion

Bamboo and rattan are two very important resources for improving livelihoods, protecting the environment and promoting green development in bamboo- and rattan-producing regions. Globally, China has the greatest abundance of bamboo and rattan resources, as well as one of the most established bamboo industries, and is the largest producer and exporter of bamboo and rattan products.

Thanks to supportive policies and the relative stability of the international bamboo and rattan trading environment, since 2009, the overall export value of Chinese bamboo and rattan commodities has been growing steadily. From 2013, the value of exports in this sector has steadied at roughly USD 2 billion, representing an increase of over 70 per cent from 2009. Bamboo- and rattan-based commodities continue growing in variety, with highly processed, industrial products comprising an increasingly larger share. The main export destinations are the USA, the EU and Japan as well as other developed countries.

China has a shortage of natural and planted rattan resources. In 2018, China's import value of rattan cane reached USD 16 million, accounting for 51 per cent of the country's total import of bamboo and rattan materials. This imported 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, through supply-oriented structural reforms, technological innovation and positive policy measures, to create products with higher resource efficiency, higher value addition, lower carbon emissions and greener, more environmentally friendly production. Bamboo and rattan products will also play an increasingly important role in replacing traditional industrial materials, such as hardwood, cement and plastics; promoting emission reductions; contributing to the globalisation of international trade; improving livelihoods in bamboo- and rattan-producing regions; and facilitating the realisation of the UN 2030 Agenda for Sustainable Development.

## Annex

**Table 1. International trade of main bamboo and rattan products in China in 2018**

Unit: USD thousand

Product	Export	Import	Product	Export	Import
Bamboo tableware	932,977	2,231	Bamboo fibre products	56,314	730
Bamboo shoots	308,459	1,052	Bamboo charcoal	48,604	669
Bamboo panels	304,053	2,596	Bamboo pulp/paper	14,006	16
Woven bamboo products	273,311	971	Rattan raw materials	5,975	15,692
Bamboo and rattan furniture	124,819	3,601	Engineered bamboo materials	301	0
Woven rattan products	83,848	2,643	Bamboo carvings	44	0
Bamboo raw materials	65,577	842			
Total	2,218,287	31,043			

**Table 2. China's main bamboo and rattan export partners in 2018**

Unit: USD thousand

Rank	Importer	Trade value	Rank	Importer	Trade value
1	The EU	535,522	11	Malaysia	34,347
2	The USA	516,380	12	Singapore	32,002
3	Japan	331,034	13	Brazil	30,109
4	Taiwan (China)	78,211	14	Indonesia	29,903
5	Vietnam	73,520	15	Hong Kong SAR	29,588
6	India	73,024	16	Israel	28,367
7	South Korea	67,302	17	Turkey	27,930
8	Australia	53,440	18	Russia	25,359
9	Thailand	47,085	19	Mexico	13,850
10	Canada	34,462	20	Saudi Arabia	13,830
	Others	143,021			
	Total	2,218,287			

**Table 3. China's main bamboo and rattan import partners in 2018**

Unit: USD thousand

Rank	Exporter	Trade value	Rank	Exporter	Trade value
1	Malaysia	11,418	11	The USA	158
2	Vietnam	3,795	12	Papua New Guinea	145
3	Indonesia	3,777	13	South Korea	122
4	The Philippines	3,603	14	Nepal	99
5	The EU	2,150	15	Thailand	84
6	Taiwan (China)	1,910	16	Russia	27
7	Japan	1,213	17	India	21
8	Myanmar	1,062	18	Morocco	9
9	Singapore	256	19	Ethiopia	6
10	Croatia	221	20	Hong Kong SAR	6
	Others	961			
	Total	31,043			

**Table 4. International trade of bamboo and rattan between China and the USA in 2018**

Unit: USD thousand

Product	From China to the USA	From the USA to China	Product	From China to the USA	From the USA to China
Bamboo panels	183,625	133	Bamboo raw materials	8,322	0
Bamboo tableware	151,049	8	Bamboo pulp/paper	5,237	0
Woven bamboo products	50,851	11	Bamboo charcoal	2,920	0
Bamboo shoots	47,617	0	Bamboo fibre products	568	0
Bamboo and rattan furniture	41,297	5	Rattan raw materials	415	0
Woven rattan products	24,463	0	Bamboo carvings	17	0
Total	516,380	158			

**Table 5. International trade of bamboo and rattan between China and the EU in 2018**

Unit: USD thousand

Product	From China to the EU	From the EU to China	Product	From China to the EU	From the EU to China
Bamboo tableware	223,690	28	Bamboo raw materials	26,647	1
Woven bamboo products	83,907	51	Bamboo pulp/paper	4,788	4
Bamboo shoots	60,005	65	Rattan raw materials	2,794	0
Bamboo and rattan furniture	51,925	65	Bamboo charcoal	1,764	0
Bamboo panels	42,293	1,886	Bamboo fibre products	806	4
Woven rattan products	36,848	46	Engineered bamboo materials	57	0
Total	535,522	2,150			

**Table 6. International trade of bamboo and rattan between China and Japan in 2018**

Unit: USD thousand

Product	From China to Japan	From Japan to China	Product	From China to Japan	From Japan to China
Bamboo shoots	150,022	0	Woven rattan products	4,119	4
Bamboo tableware	127,465	246	Bamboo and rattan furniture	2,924	30
Woven bamboo products	24,206	237	Rattan raw materials	582	0
Bamboo charcoal	10,048	13	Bamboo pulp/paper	420	0
Bamboo panels	6,999	22	Bamboo fibre products	15	653
Bamboo raw materials	4,234	9	Bamboo carvings	0	1
Total	331,034	1,213			

**Table 7. International trade of bamboo and rattan between China and Malaysia in 2018**

Unit: USD thousand

Product	From China to Malaysia	From Malaysia to China	Product	From China to Malaysia	From Malaysia to China
Bamboo tableware	14,569	0	Bamboo raw materials	1,068	0
Bamboo panels	11,091	15	Rattan raw materials	99	11,400
Woven bamboo products	3,673	0	Bamboo charcoal	67	0
Bamboo shoots	1,283	0	Bamboo pulp/paper	32	0
Woven rattan products	1,221	3	Engineered bamboo materials	32	0
Bamboo and rattan furniture	1,191	0	Bamboo fibre products	21	0
Total	34,347	11,418			

**Table 8. International trade of bamboo and rattan between China and Indonesia in 2018**

Unit: USD thousand

Product	From China to Indonesia	From Indonesia to China	Product	From China to Indonesia	From Indonesia to China
Bamboo tableware	24,917	11	Bamboo and rattan furniture	61	2,386
Bamboo fibre products	3,816	0	Woven rattan products	29	1,161
Woven bamboo products	487	12	Bamboo charcoal	2	0
Bamboo panels	262	10	Bamboo pulp/paper	0	0
Bamboo raw materials	203	60	Rattan raw materials	0	137
Bamboo shoots	126	0	Bamboo carvings	0	0
Total	29,903	3,777			

**Table 9. International trade of bamboo and rattan between China and Vietnam in 2018**

Unit: USD thousand

Product	From China to Vietnam	From Vietnam to China	Product	From China to Vietnam	From Vietnam to China
Woven bamboo products	34,142	487	Woven rattan products	105	1,113
Bamboo tableware	21,073	970	Bamboo pulp/paper	69	0
Bamboo shoots	16,211	0	Bamboo raw materials	58	53
Bamboo panels	1,459	0	Bamboo and rattan furniture	9	772
Rattan raw materials	246	0	Bamboo fibre products	8	0
Bamboo charcoal	141	402	Bamboo carvings	0	0
Total	73,520	3,795			

**Table 10. International trade of bamboo and rattan between China and Taiwan (China) in 2018**

Unit: USD thousand

Product	From China to Taiwan	From Taiwan to China	Product	From China to Taiwan	From Taiwan to China
Bamboo tableware	58,434	419	Bamboo fibre products	268	0
Woven bamboo products	9,326	24	Bamboo charcoal	261	141
Bamboo raw materials	3,910	205	Woven rattan products	260	0
Bamboo panels	2,233	137	Bamboo pulp/paper	175	0
Bamboo shoots	1,947	982	Rattan raw materials	37	0
Bamboo and rattan furniture	1,356	2	Bamboo carvings	1	0
Total	78,211	1,910			



The International Bamboo and Rattan Organisation (INBAR) is the multilateral development organisation of 46 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 governments, private and NGO sectors to promote a global agenda for sustainable development using bamboo and rattan.