



## Bamboo value chains & inclusive green growth

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15<sup>th</sup> Anniversary Year





## BAMBOO

- > 1200 Species
- Tropics & sub-tropics
- Smallholder & plantation 'crop'
- Alternative for timber
- High innovation potential

# Commercially important bamboo species

Species	Area	Use
<i>Bambusa vulgaris</i>	Tropics	Construction, medicine, shoots
<i>Chusquea culeou</i>	S America	Furniture, handicrafts, construction
<i>Dendrocalamus asper</i>	(Sub-)Tropics	Construction, pulp, shoots
<i>Dendrocalamus giganteus</i>	(Sub-)Tropics	Construction, pulp, shoots
<i>Guadua angustifolia</i>	S & C America	Construction, furniture, handicrafts
<i>Melocanna bacifera</i>	SE Asia	Construction, shoots
<i>Oxytenanthera abyssinica</i>	Africa	Construction, handicrafts, shoots
<i>Phyllostachys edulis</i>	China	Industrial products, shoots
<i>Yushania alpina</i>	E Africa	Construction, weaving, furniture

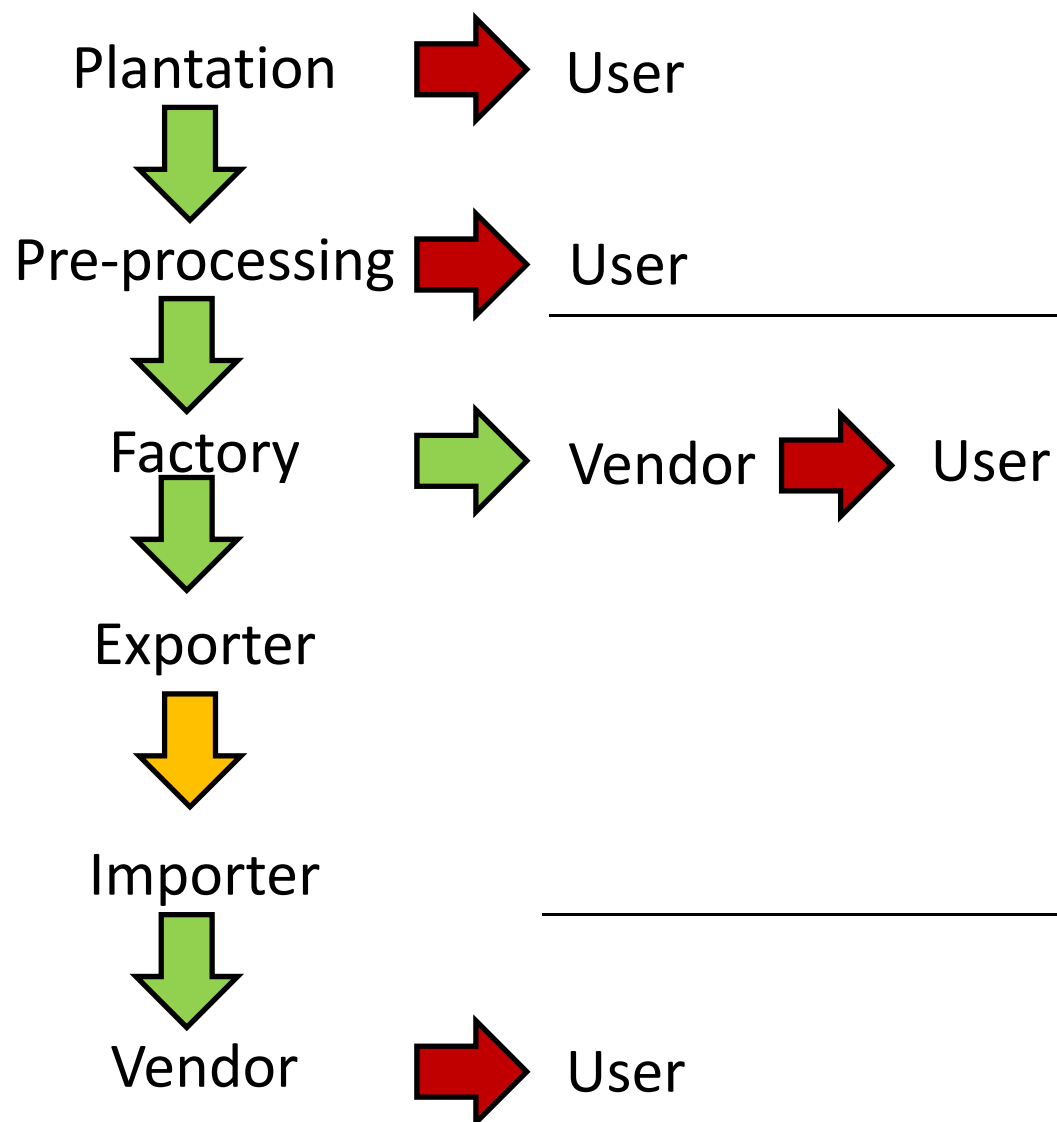
Excluding ornamentals

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# Bamboo Value Chains



Market

Informal  
(???)

Formal/National  
(14 bln USD in China)

Formal/International  
(1.5 – 2 bln USD)



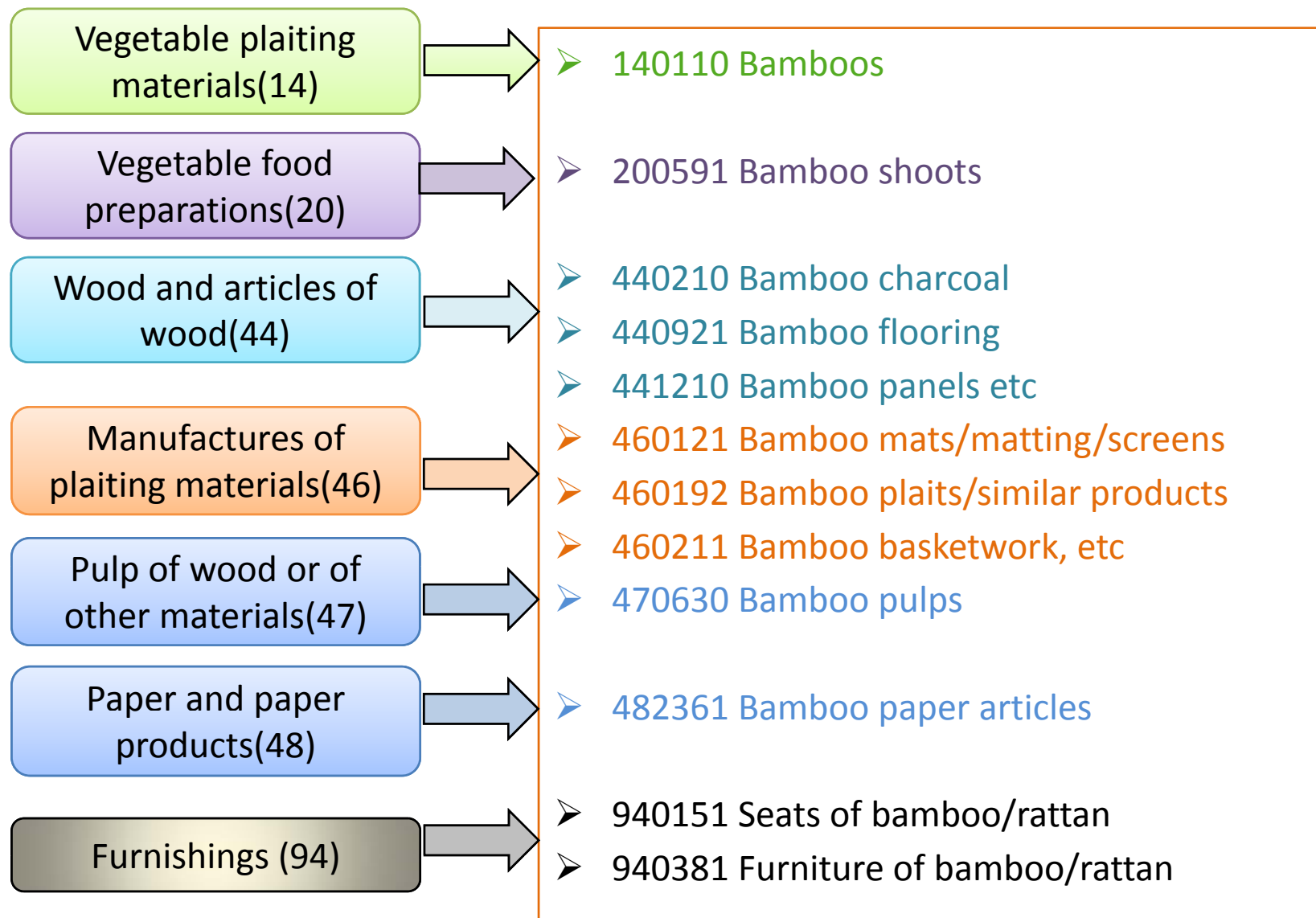


# HS Codes for bamboo

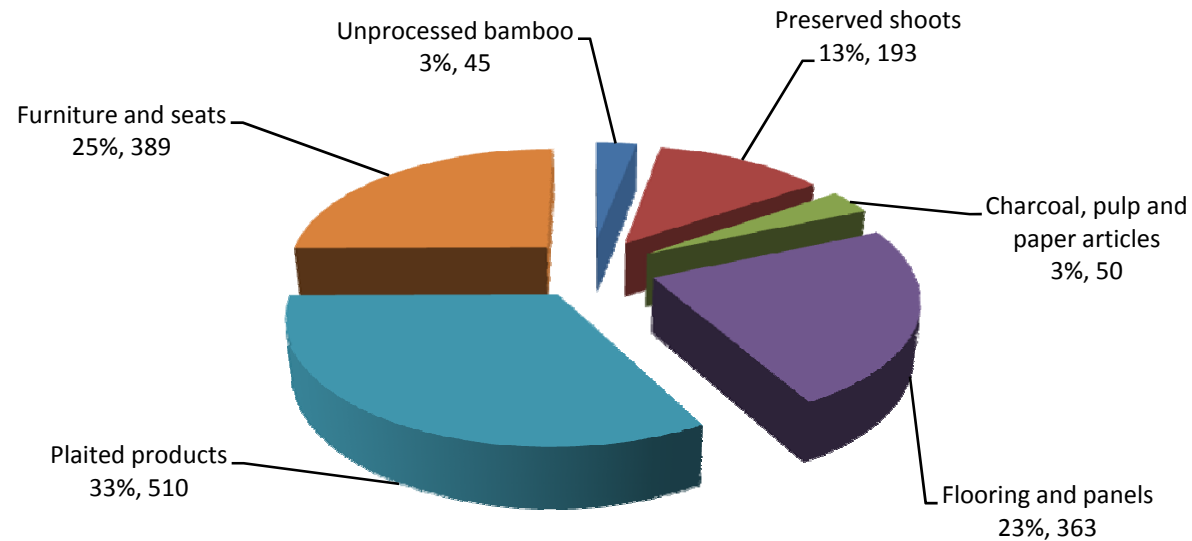
- Harmonized Commodity Description and Coding Systems: the international nomenclature for products classification;
- Six-digit code system at the international level; comprising approximately 5,300 article/product descriptions; arranged in 99 chapters and grouped in 21 sections;
- The Harmonized System has been adopted by most of the countries worldwide since it was introduced in 1988 and has undergone several changes-revision in products classification, in 1996, 2002 and 2007.



# 12 6-digit Bamboo HS Codes (Since 2007)



# Global Trade



- Most trade within Asia, within Europe, and between Asia and Europe and N America
- China and Vietnam main exporters
- EU, USA and Japan main importers

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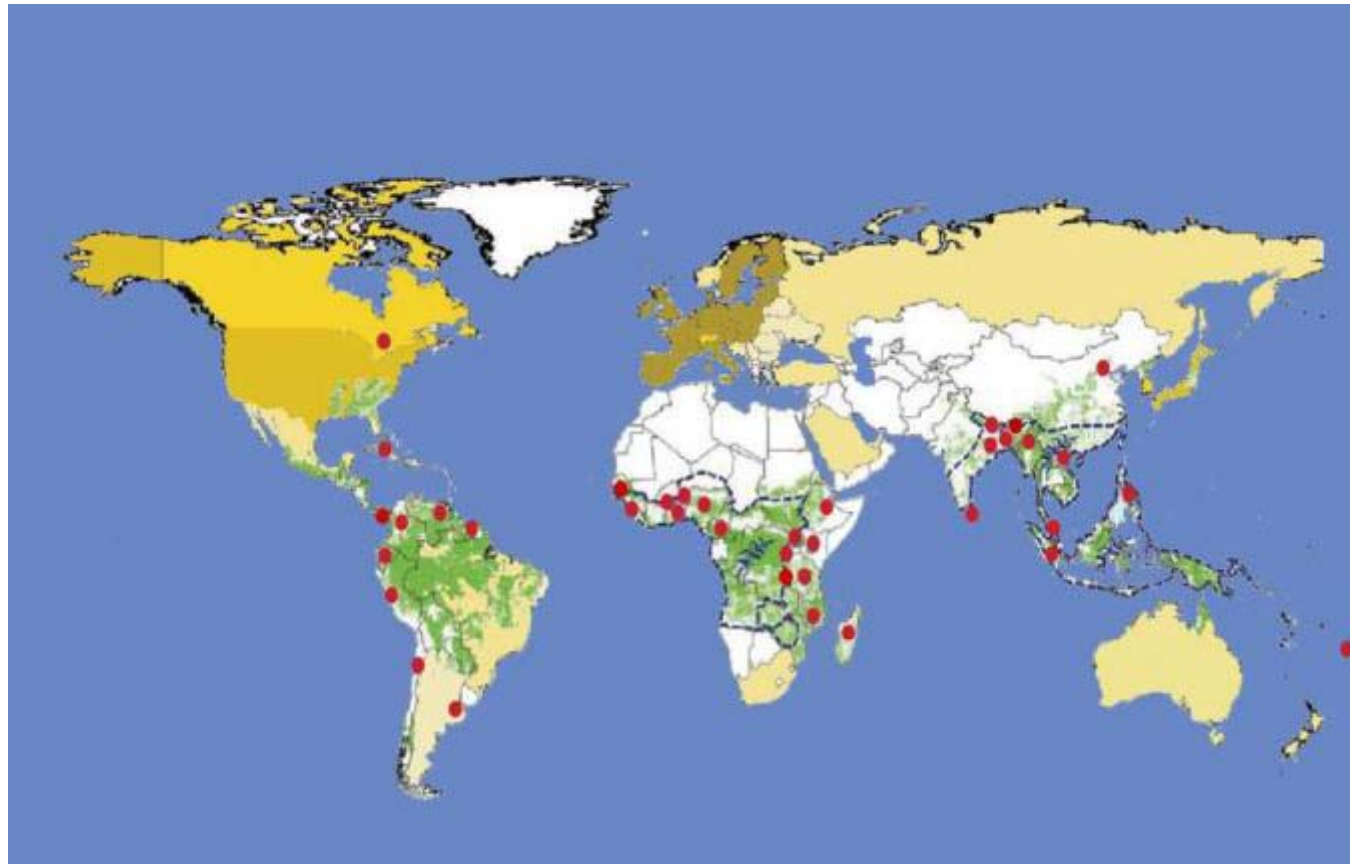
## Trade in China

- Bamboo industry output increased from 2.5 in 2000 to 14 bln USD in 2008
- Export increased from 0.3 in 1992 to 1.4 bln USD in 2008
- Annual growth 18%





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**The World of Bamboo & INBAR member countries**

# Trade Statistics

- UN Comtrade Database:

<http://db.comtrade.un.org>

- EU Trade Statistics:

<http://exporthelp.europa.eu>

- INBAR bamboo and rattan trade database:

<http://trade.inbar.int/>

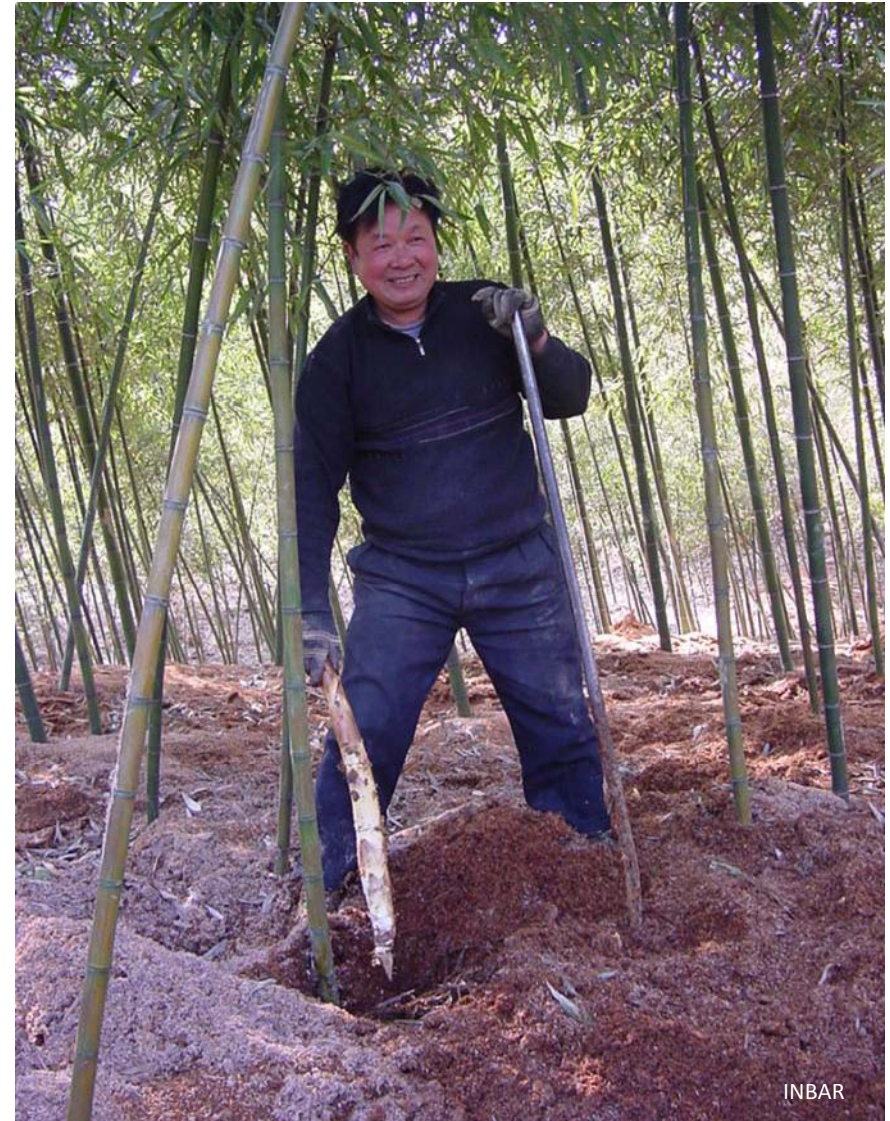


# Bamboo in Zhejiang-Lin'an, China





1. Scientific planning
2. Protection, rehabilitation and reconstruction of the local ecosystems
3. Developing environment friendly products/enterprises
4. Participatory decision making
5. Disclosure of rural areas
6. Development and implementation of supportive policies



## Impact

Indicator	1980	1990	2000	2009
Total population	450,200	494,000	512,000	526,000
Rural population	414,500	444,000	429,000	416,000
Per capita GDP (USD)	300	400	1,600	6,500
Poverty index	60	40	5	benefits
Forest area (1000 ha)	n/a	117	121	140
Bamboo forests (1000 ha)	n/a	36	56	65
Bamboo value (mln USD)	n/a	15	90	404
Bamboo value (mln RMB)	n/a	72.2	750	2,760
Nature reserves (ha)	n/a	1,899	4,626	7,994
Paved roads rural areas (%)	n/a	70	99.5	100
Washing machines (/100 rhh)	0*	12	52	88
Cell phones (/100 rhh)	n/a	n/a	18	204

Notes: n/a – not available; benefits – local government provides benefits to poor people; \* - 1982; rhh – rural households

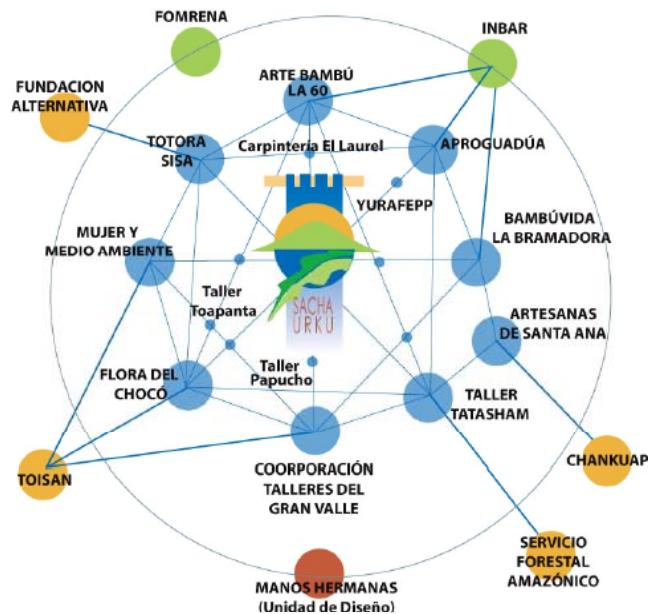
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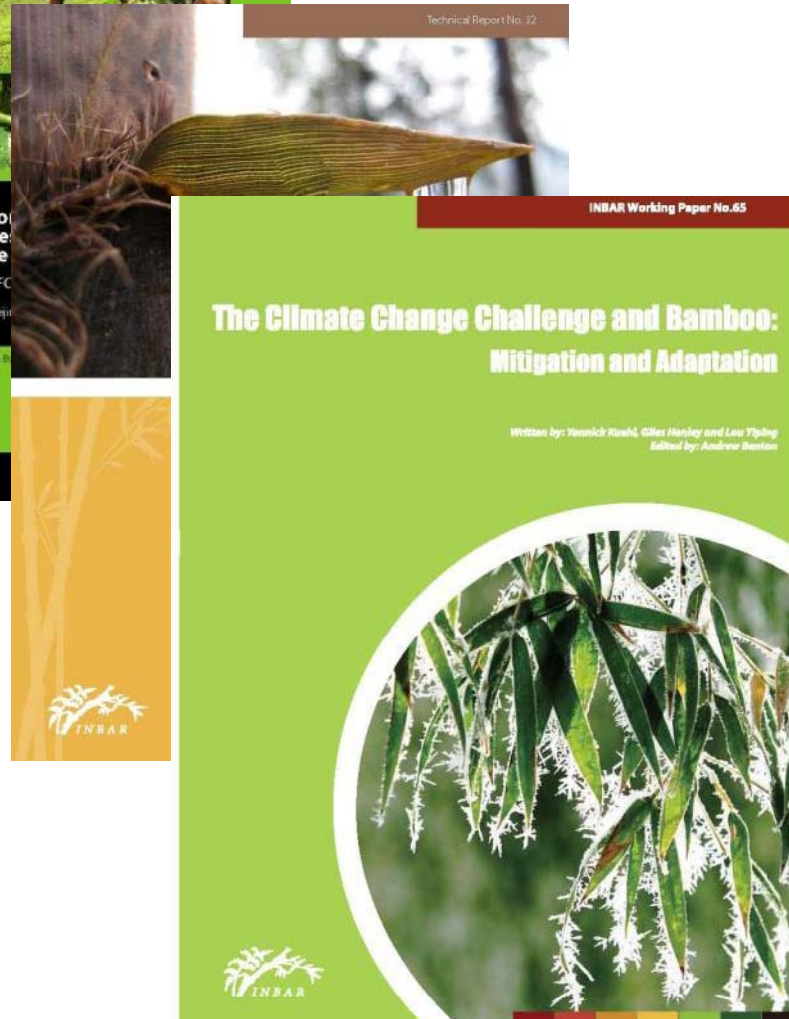
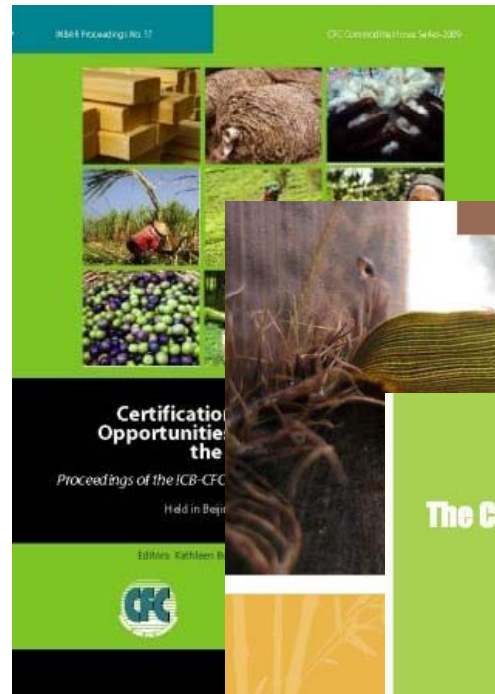


- Consortium supports > 200 artisans
- Provides market access, designs, revolving fund
- 9 Micro-enterprises, each sales of 6500 USD/year

**ECUADOR – Sacha Urku**

# 'Green' Developments

- Certification
- FLEGT/Lacey
- Climate Change



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# FLEGT/Lacey Act Impacts on BR Trade

- EU FLEGT Action Plan:

- Bilateral Trade Agreements (FLEGT licensed timber);
- EU Timber Regulation (Due Diligence System);
- Bamboo products covered.

- US Lacey Act:

- Definition/measures on illegal plant and plant products;
- Declaration for importing products;
- Bamboo products covered.





Covers almost all timber products, excluding recycled products, printed materials:

- HS Chapter 44: Wood and articles of wood
- HS Chapter 47: Pulp of wood or of other fibrous ...
- HS Chapter 48: Paper and paperboard...
- HS Chapter 94: Furniture; bedding....





# Bamboo Products covered by FLEGT/Lacey

- Existing UN HS codes covering Bamboo products
  - 4402: Bamboo charcoal (FLEGT/Lacey)
  - 4409: Bamboo flooring (FLEGT/Lacey)
  - 4412: Bamboo plywood (FLEGT/Lacey)
  - 4823: Bamboo paper articles(FLEGT)
  - 9401: Seats of bamboo/rattan(FLEGT)
- More HS Codes potentially covering Bamboo products
  - 4418: Builders' joinery and carpentry (FLEGT/Lacey)
  - 4419: Tableware & kitchenware (FLEGT/Lacey)
  - 4420: Statuettes & other ornaments (FLEGT/Lacey)





# Climate Change => A MAD Challenge



- Coping with Climate Change:
  - **Mitigation**
  - **Adaptation**
  - **Development**
- aka inclusive, green economy
- Old (& new) bamboo and recognized as a pro-poor, green commodity



# Bamboo value chains & inclusive green growth

Chair: Walter Liese	
Coosje Hoogendoorn INBAR	Bamboo Value Chains and Inclusive Green Growth
Guy Sneyers CFC	Commodity Value Chains and Poverty Alleviation
Yue Yongde ICBR	Bamboo Value Chain in China and the Importance of Research
Fu Jinhe & Tesfaye Hunde INBAR	Value Chain in Development: Bamboo Charcoal
Johan Gielis Oprins	Temperate Bamboos in Ornamental Horticulture
Kathleen Buckingham Oxford University	Role of Certification in Value Chain Development

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**& Thank you very much  
for your attention**

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