Bamboo value chains & inclusive green growth

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15th Anniversary Year
BAMBOO

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

15th Anniversary Year
## Commercially important bamboo species

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

Excluding ornamentals
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)

- Vegetable plaiting materials (14)
  - 140110 Bamboos
- Vegetable food preparations (20)
  - 200591 Bamboo shoots
- Wood and articles of wood (44)
  - 440210 Bamboo charcoal
  - 440921 Bamboo flooring
  - 441210 Bamboo panels etc
  - 460121 Bamboo mats/matting/screens
  - 460192 Bamboo plaits/similar products
  - 460211 Bamboo basketwork, etc
  - 470630 Bamboo pulps
- Manufactures of plaiting materials (46)
  - 482361 Bamboo paper articles
- Pulp of wood or of other materials (47)
  - 940151 Seats of bamboo/rattan
- Paper and paper products (48)
  - 940381 Furniture of bamboo/rattan
- Furnishings (94)
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

The International Network for Bamboo and Rattan
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%
The International Network for Bamboo and Rattan

The World of Bamboo & INBAR member countries
• 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

Mid-elevation: Bamboo and mixed forests

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

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

15th Anniversary Year
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
<table>
<thead>
<tr>
<th>Chair: Walter Liese</th>
<th>Bamboo Value Chains and Inclusive Green Growth</th>
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<td>Guy Sneyers</td>
<td>Commodity Value Chains and Poverty Alleviation</td>
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<td>Yue Yongde</td>
<td>Bamboo Value Chain in China and the Importance of Research</td>
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<td>ICBR</td>
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<td>Fu Jinhe &amp; Tesfaye</td>
<td>Value Chain in Development: Bamboo Charcoal</td>
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<td>Johan Gielis</td>
<td>Temperate Bamboos in Ornamental Horticulture</td>
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<td>Oprins</td>
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<td>Kathleen Buckingham</td>
<td>Role of Certification in Value Chain Development</td>
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<td>Oxford University</td>
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Special thanks to Wu Junqi and Prof Zhu for data and advice

& Thank you very much for your attention

The International Network for Bamboo and Rattan