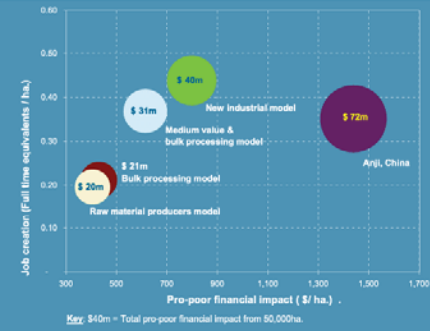


Policy Choices

- Policy can help create a high efficiency, high output industrial bamboo sector.
- A 'New Industrial Model' which maximises high value products and modelled on China's innovations is preferred to bulk processing (paper, pulp etc).
- Anji industrial mix is the same as proposed in Mekong. It creates more value owing to higher labour and material costs in China. A glimpse of future potential.



Summary of Mekong Bamboo Sector Potential

Sub sector	Overall impact	Impact scale			Impact efficiency			Gender bias of impact % of FTEs to women	Rural bias of impact % of FTEs to rural communities	Environmental impact
		Pro-poor financial impact	Financial output	Job creation	Pro-poor financial impact	Financial output	Job creation			
		USD millions	USD millions	FTE (000's)	USD/ha.	USD/ha.	FTE/ha.			
Handicrafts	*****	***	***	*****	*****	*****	*****	*****	*****	*****
Bamboo shoots	**	**	*	*****	*****	*	*****	*****	*****	*****
Industrial Processing	*****	*****	*****	**	**	**	***	***	***	***
Total		809	1,185	1,232	1,680	2,303	2.3	56%	56%	



Pro-Poor BAMBOO Opportunities in the Mekong

Next Steps

- Supply chain pilots in Laos Cambodia, replication in Viet Nam.
- National, provincial industry policy, sector promotion, business facilitation.
- Business Partnerships, provision of capital, Linkages to other markets.
- Wide collaboration, Mekong Bamboo consortium.

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Impacts of the MPDF Thanh Hoa Value Chain Pilot

- The Pilot project is helping transfer the New Industrial Model to Viet Nam.
- Total of preprocessing workshops creating 539 new jobs, annual salaries from preprocessing workshops is USD 294,000 in an area where incomes < USD 100 pa.
- Total sales value generated by the workshops is USD 280,000/month.
- 533 ha bamboo planted will generate USD159,000 per annum starting from 2010.
- Raw material demand is increasing, price has increased 20% to benefit of farmers.

Pro-Poor Bamboo Opportunities in the Mekong

The world bamboo market is USD 7 billion and growing. Up to 80% of this value is captured by farmers and workers through increased farm incomes and new jobs. Bamboo can be an engine for poverty reduction.

Oxfam Hong Kong (OxHK) and Mekong Private Sector Development Facility (MPDF) have completed a bamboo sector feasibility study for Viet Nam, Laos and Cambodia to complement the MPDF pilot bamboo value chain project in Thanh Hoa province, Viet Nam.



The Bamboo Market Opportunity

- The global market is USD 7 billion. By 2017 it may double/triple.
- China's share is ~ USD 6 billion.
- Chinese innovation means that bamboo properties of strength, hardness and attractiveness can be captured in a range of new products.
- Through this, bamboo products are penetrating large multi-billion dollar global markets like furniture, homewares, flooring, and building products.
- Current Mekong share is Viet Nam USD 250 million, Laos USD 4 million and Cambodia US 7 million.
- By 2017 Mekong potential is USD 1.2 billion pa with > USD 900 million pro-poor income.
- It could create an additional 800,000 jobs growing to 1.2 million with almost 50 - 60% of these jobs as rural on farm or processing jobs. More than 50% for women.
- It has positive carbon and environmental aspects compared to timber forests.



Innovations in The Bamboo Sector

- 3 sub-sectors: handicrafts, bamboo shoots, and industrial processing.
- Industrial streams for the bamboo sector include:
 - raw bamboo culm (scaffolding, traditional construction).
 - low value bulk (paper, pulp, charcoal).
 - medium value (chopsticks, blinds, building).
 - high value (flooring, laminated furniture).
- Industrial innovations in China have optimised output. Micro-businesses now pre-process at/near source, sending different parts of the plant into different product chains maximising efficiency.

