DOI: http://dx.doi.org/10.21686/2410-7395-2025-4-28-43

КРЕАТИВНЫЕ ОТРАСЛИ КИТАЯ: ТЕНДЕНЦИИ И СТРУКТУРНЫЕ ПРЕОБРАЗОВАНИЯ В ПРОИЗВОДСТВЕ И ТОРГОВЛЕ [1]

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В данном исследовании анализируются развитие и структурная трансформация крупнейших креативных отраслей Китая с 2004 по 2023 г. Несмотря на то что Китай стал мировым экспортером продукции креативных отраслей с общим объемом торговли в 166,36 млрд долларов и устойчивым профицитом торгового баланса, в отрасли сохраняются структурные противоречия. Исследование показало, что креативные отрасли Китая демонстрируют динамику сильного производственного сектора и слабого контента, при этом основные продукты контента, такие как публикации, составляют всего 3,1% от общего объема экспорта и испытывают устойчивый дефицит торгового баланса. Инициатива «Один пояс – один путь» дает возможности снизить зависимость от рынков развитых стран. Для достижения устойчивого роста Китаю важно трансформировать креативные отрасли, отказавшись от акцента на масштаб и производство в пользу инноваций и качества контента. Исследование может стать основой разработки экономической политики для стран с развивающейся экономикой, стремящихся решить структурные проблемы креативных отраслей посредством регионального сотрудничества.

Ключевые слова: торговля креативных отраслей, культурная индустрия, торговля товарами культурного назначения, структурный дисбаланс, инициатива «Один пояс – один путь» (ОПОП), Китай.

CREATIVE INDUSTRIES OF CHINA: TENDENCIES AND STRUCTURAL TRANSFORMATION IN PRODUCTION AND TRADE [2]

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This study analyzes the development and structural transformation of China's cultural industries from 2004 to 2023. Although China has become the world's largest exporter of

[1] Исследование было поддержано грантом Российского научного фонда № 22-18-00679, https://rscf.ru/en/project/22-18-00679/

[2] The study was supported by the grant of the Russian Science Foundation N 22-18-00679, https://rscf.ru/en/project/22-18-00679/

cultural products, with a total trade volume of US$166.36 billion and a sustained trade surplus, structural contradictions persist within the industry. The study found that China's cultural industry exhibits a "strong manufacturing sector and weak content" dynamic, with core content products such as publications accounting for only 3.1% of total exports and experiencing a persistent trade deficit. The Belt and Road Initiative provides a crucial path to reducing reliance on developed countries' markets. China urgently needs to transform its industry from a scale-driven, manufacturing-dependent model to one centered on content innovation and quality to achieve sustainable growth. This study offers valuable insights for emerging economies seeking to address the structural challenges of cultural trade through regional cooperation.
Keywords: Trade in creative industries, Cultural industry, Cultural trade, Structural imbalance, Belt and Road Initiative (BRI), China.

Introduction

With the globalization of the knowledge economy, the cultural industry has become a key driver of global economic transformation [17]. The cultural industry is a knowledge-intensive industry based on individual creativity, skills, and intellectual property creation. Over the past two decades, the cultural industry has expanded rapidly around the world, with its growth rate exceeding that of many traditional industries [8]. The cultural economy can also enhance a country's image and influence, promote innovation in other industries, create high-quality employment opportunities, and stimulate economic growth and urban development transformation [7; 13; 25]. The cultural industry faces the market in the form of cultural products to achieve value exchange. Therefore, cultural products are a key bridge connecting creative supply and consumer demand.

Cultural products refer to goods and services such as artwork, heritage preservation, cultural industries, and art festivals. According to UNESCO, the cultural industry currently accounts for approximately 3.1% of global GDP, contributes to 6.2% of global employment, and creates approximately 50 million jobs worldwide. The cultural industry's economic contribution is estimated to be between $2.3 trillion and $4.3 trillion annually, and is projected to account for approximately 10% of global GDP by 2030. Consequently, many governments have established the cultural industry as a new pillar of national economic development.

The Chinese government has issued the "Several Economic Policies on Promoting High-Quality Cultural Development", which clearly puts forward the goal of developing the cultural industry into a pillar industry of the national economy. In 2023, the added value of China's cultural and related industries reached US$843.7 billion, accounting for 4.59% of GDP, an increase of 7.1% over the previous year. According to statistics from the General Administration of Customs, in 2023, the total import and export volume of China's cultural products reached US$166.363 billion, and China has become the world's largest exporter of cultural products [16]. A country's cultural output can influence the cognition of the international community and eliminate diplomatic and trade barriers. The popularization of cultural products can enhance the national brand and make other products and services more attractive [5; 17].

Looking back at the history of China's rapid economic growth, it was mainly based on large-scale resource input, a large amount of capital and labor supply. This model has brought about tremendous growth in the national economy, but it is no longer suitable for the operation of China's economy today [23]. In today's world where resources are no longer abundant, labor costs are rising, and environmental problems are becoming increasingly serious, the country needs to develop industries with high added value, low resource consumption, high-capacity utilization, and environmental protection. The cultural industry is an industry with these characteristics.

Literature Review

Different countries have different definitions of cultural industries. The concept of cultural and creative industries (CCIs) matured in the early 21st century. In 2001, John Hawkins systematically expounded on the "creative economy" that creates wealth through creativity and intellectual property rights [6], while the UK Department for Culture, Media and Sport (DCMS) officially defined the "creative industries" for the first time [10]. Since then, international definitions have become diversified: UNCTAD and UNESCO adopt an inclusive framework, emphasizing its symbolic value [26]; the United States focuses on "copyright industries" and South Korea focuses on cultural commercialization [18]. China's current definition is relatively broad, viewing it as "an emerging industry that commercializes cultural elements and intellectual property rights." This diversity highlights the need for specific analysis based on national conditions.

Academic research generally agrees that CCIs are key catalysts for economic growth and transformation. Its theoretical basis can be traced back to Solow's (1956) growth model that emphasizes technological progress [4], and its significant contribution to GDP has been confirmed by empirical studies such as Padalino (1997) [20]. Florida's (2005) "creative class" theory and subsequent research show that CCIs can promote regional innovation and new enterprise formation through talent aggregation and knowledge spillovers [3; 9; 21]. However, existing research focuses on overall economic contributions and lacks analysis of the internal value chain structure and structural contradictions of manufacturing-intensive economies [8; 19]. Cultural trade is constrained by economic scale, cultural and geographical distance, and institutional environment. Economic factors are the basic driving force. As Krugman [14] explained the home market effect, the GDP and per capita income level of trading partners significantly promote cultural trade through economies of scale [24]. Although geographical and cultural distance usually creates resistance by increasing transaction costs and reducing affinity, the low materiality and high content orientation of digital products (such as streaming) can partially offset this negative impact [1; 2; 28;]. Furthermore, the institutional environment constitutes a key framework. Efficient legal systems, digital governance, and free trade agreements can lower barriers, while protectionist policies inhibit market access [22]. Therefore, understanding a country's cultural trade situation requires a comprehensive consideration of the interaction between its economic foundation, cultural affinity, and institutional policies.

Existing research suffers from two key gaps: first, a lack of systematic structural analysis of China's cultural trade; and second, insufficient exploration of the strategic role of China's policy-driven model (the Belt and Road Initiative) in cultural trade. Therefore, this paper aims to fill these gaps through a structure-oriented analytical framework and provide insights into how emerging economies can address trade structural challenges through regional cooperation.

Methodology and Data Sources

This article primarily utilizes structural analysis and time series data trend analysis, combined with descriptive statistics and graphical visualization, to systematically analyze the scale, structure, and market distribution of China's cultural product trade from 2004 to 2023, as well as the current status of cultural trade with countries and regions along the Belt and Road Initiative.

This article draws on official Chinese and internationally authoritative databases. Macroeconomic indicators are provided by the National Bureau of Statistics of China. The authors compiled detailed data on cultural product imports and exports based on the 2024 Statistical Yearbook of the National Bureau of Statistics of China. The Ministry of Commerce of the People's Republic of China provides statistical data related to the Belt and Road International Cooperation Platform, which is used to analyze cultural trade between China and countries along the Belt and Road Initiative.

Structural Analysis of China's Cultural Industry and Trade

The Chinese government attaches great importance to the development of the cultural industry, viewing it as a key engine for enhancing the country's cultural soft power and promoting high-quality economic development. Through a series of top-level designs and strategic plans, such as the "Several

Economic Policies to Promote High-Quality Cultural Development"[1] and the "14th Five-Year Plan for Cultural Industry Development"[2], the Chinese government has provided institutional guarantees and policy support for the development of the cultural industry. China's spending on culture and tourism has increased from 48.01 billion yuan in 2012 to 128.04 billion yuan in 2023, an average annual growth of 9.3%[3].

Figure 1 shows the evolution of the added value of China's cultural and related industries and their share of GDP from 2004 to 2023, demonstrating a trend of steady expansion and sustained growth. In 2012, the added value of cultural and related industries as a percentage of GDP exceeded 3% for the first time, reaching 3.36%, a significant milestone. By 2023, the added value of cultural and related industries reached 5.95 trillion yuan, accounting for 4.59% of GDP, an increase of 0.17 percentage points over the previous year. The continued growth of cultural and related industries highlights their growing role in the national economy and their potential to enhance China's cultural soft power and international trade.

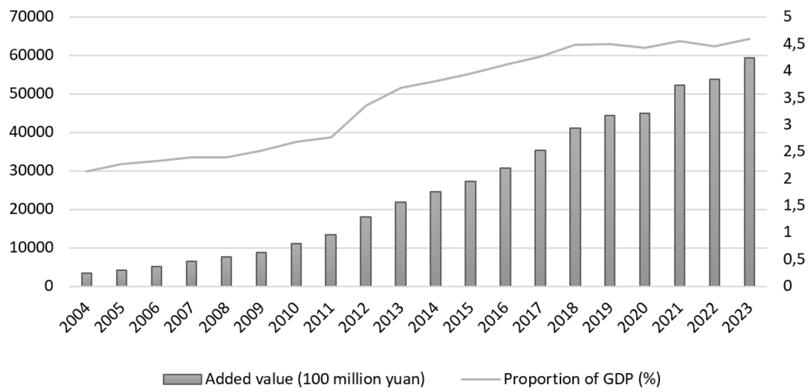

Figure 1. Value Added and GDP Share of China's Culture and Related Industries[4]

As shown in Figure 2, China's cultural product trade has achieved significant growth in the past two decades, with the total trade volume increasing from US$18.72 billion in 2005 to US$166.363 billion in 2023, with an

[1] Several Economic Policies to Promote High-Quality Cultural Development. – URL: https://www.gov.cn/zhengce/zhengceku/202501/content_7000959.htm

[2] 14th Five-Year Plan for Cultural Industry Development. – URL: https://www.gov.cn/zhengce/2022-08/16/content_5705612.htm

[3] Chinese Government Network. – URL: https://www.gov.cn/lianbo/bumen/202409/content_6976124.htm

[4] Compiled by the author based on reports from the National Bureau of Statistics of China (2004–2023). – URL: https://www.stats.gov.cn/sj/ndsj/

average annual growth rate of 14.2%. The total trade volume has increased nearly tenfold.

As shown in Figure 3, between 2005 and 2019, the average growth rate of China's cultural product trade (14.7%) significantly exceeded the GDP growth rate (10.8%) during the same period, confirming the positive role of cultural trade in driving economic growth. Furthermore, the pace of expansion of cultural trade has roughly synchronized with, but slightly slowed down, the overall growth of the cultural industry (average 16.5% from 2005 to 2023).

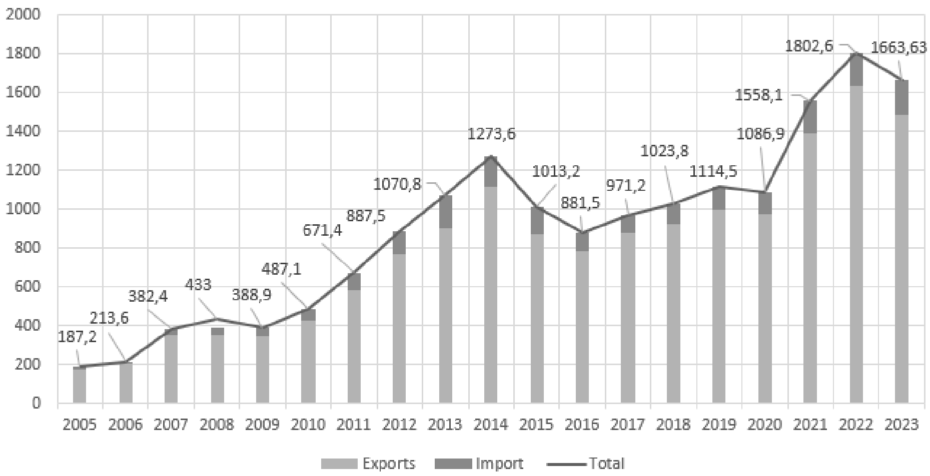

Figure 2. China's Trade in Cultural Products (In US$ 100 million)[1]

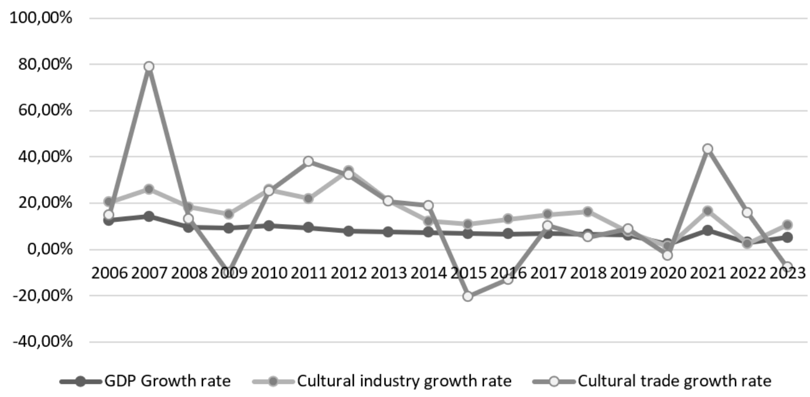

Figure 3. Comparison of the growth rates of China's cultural products trade, cultural industries and GDP[2]

[1] The data from 2005 to 2023 are from the Cultural Trade Public Information Service Network of the Ministry of Commerce of the People's Republic of China. – URL: https://tradeinservices.mofcom.gov.cn/list/wenhua/shujutj/1/cateinfo.html.

[2] National Bureau of Statistics of China. – URL: https://www.stats.gov.cn/sj/ndsj/

Figure 3 shows that the growth rate of the cultural industry is slowing down over the long term, while the growth rate of cultural trade fluctuates most significantly, with GDP growth serving as a stable benchmark. This reflects the fact that cultural trade is influenced by external factors such as global market demand and the international trade environment.

In the field of cultural trade, as shown in Figure 4, from 2015 to 2022, China's cultural trade export market was primarily dominated by countries and regions such as Hong Kong, the United States, Japan, the United Kingdom, and Germany. The economic size of trading partners has a positive impact on cultural trade exports [1; 24]. The United States currently holds the top position among China's cultural trade partners. China's cultural trade exports are primarily directed to developed countries and regions.

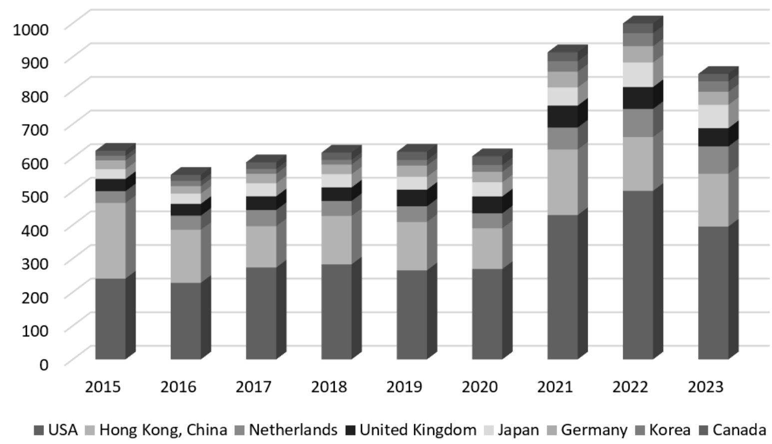

Figure 4 China's cultural product trading partners and trade volume (In US$ 100 million)[1]

The structure of China's cultural product trade is analyzed from three dimensions: commodity structure, business entity structure and trade mode structure.

As shown in Table 1, China's cultural products trade in 2023 exhibited a serious structural imbalance. Publications trade, at $5.1 billion, accounted for only 3.6% of total trade, highlighting its marginal position. In stark contrast, trade in handicrafts ($45.22 billion), cultural products ($78.48 billion), and cultural equipment ($33.39 billion) dominated. China's cultural trade is heavily skewed toward tangible products and manufacturing, while core content industries such as publications remain severely underdeveloped.

[1] Ministry of Commerce of China. – URL: https://data.mofcom.gov.cn/hwmy/imexCountry.shtml

Table 1

Import and export of cultural products by commodity category (2023)*
(In US$ 100 million)

Projects	Total	Imports	Exports	Trade balance
Publications	51	37.7	13.3	13.3
Arts, crafts and collectibles	452.2	366.1	86.1	86.1
Cultural supplies	784.8	761.9	22.9	22.9
Cultural equipment	333.9	282.5	51.4	51.4

* *Sources of Table 1; 2; 3*: The author compiled the data based on the 2024 Statistical Yearbook of the National Bureau of Statistics of China. – URL: https://www.stats.gov.cn/sj/ndsj/2024/indexch.htm

As shown in Table 2, general trade is the absolute main force, but there is a huge trade deficit; while processing trade and other trade have achieved a surplus and become a source of contribution to net exports.

Table 2

Import and export of cultural products by trade mode (2023)* (In US$ 100 million)

Projects	Total	Imports	Exports	Trade balance
General trade	865	771.4	93.7	677.7
Processing trade	436.7	412.6	24.1	388.5
Other trade	320.1	264.2	56	208.2

Table 3 shows the role and contribution of different types of enterprises in cultural trade. Collective, private, and other enterprises account for 70.1%. Their exports of 105.79 billion yuan far exceed their imports of 7.91 billion yuan, resulting in a significant surplus, indicating that private enterprises are the most important component of China's cultural product trade. Foreign-invested enterprises account for 25.4%, demonstrating their role in introducing foreign cultural products and technologies. State-owned enterprises account for 4.5%, having a relatively small impact on overall trade. China's cultural product trade has formed a diversified pattern of "private-led, foreign participated" trade.

Table 3

Import and export of cultural products by enterprise type (2023)
(In US$ 100 million)

Projects	Total	Imports	Exports	Trade balance
State-owned enterprises	73	38.9	34.1	4.8
Foreign-owned enterprises	411.9	351.3	60.5	290.8
Collective, private, and other enterprises	1137	1057.9	79.1	978.8

Cultural trade is increasing under the Belt and Road Initiative

The Belt and Road Initiative is a major international cooperation initiative proposed by Chinese leaders in Kazakhstan and Indonesia in September and October 2013, respectively. It includes the Silk Road Economic Belt and the 21st Century Maritime Silk Road. This initiative aims to promote global common prosperity and build a community with a shared future for mankind. It is the top-level design of China's opening up and economic diplomacy in the new era.

As shown in Figure 5, from 2008 to 2023, China's cultural product trade with Belt and Road countries and regions increased from US$5.89 billion to US$48.449 billion. The growth rate of trade accelerated significantly after 2022. Cultural product trade with Belt and Road countries and regions accounted for a record high of 29.87% of China's total cultural product trade. This also reflects the changing importance of the Belt and Road market relative to China's global cultural trade.

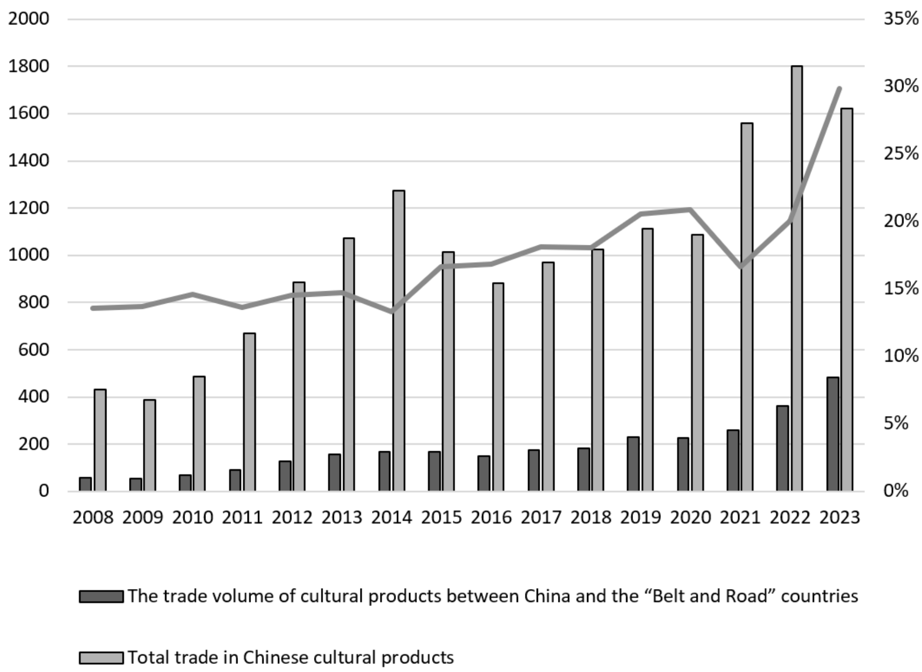

Figure 5. The trade situation of cultural products between China and the “Belt and Road” countries[1] (In 100 million U.S. dollars)

[1] Ministry of Commerce of the People’s Republic of China. – URL: https://tradeinservices. mofcom .gov.cn/list/wenhua/shujutj/1/cateinfo.html.

Discussion

The study reveals the multifaceted nature of China's cultural product trade in the global landscape. China has achieved a huge trade surplus thanks to its manufacturing strength, but it also needs to improve its exports of cultural content. In addition, at the regional level, China is exploring emerging markets through the Belt and Road Initiative. This complex combination of "strong manufacturing, weak content" and "market diversification" is the key to understanding the current situation and challenges of China's cultural trade. First, China's trade surplus exceeds US$127 billion, and its exports of cultural products and special equipment account for 48.4% of global exports. The data confirms China's central position in the global cultural product supply chain. However, this advantage is the spillover effect of industrial manufacturing capabilities rather than a reflection of cultural appeal. Second, the trade volume masks the structural imbalance of trade. The trade volume of cultural content accounts for only 3.1%, and the trade deficit is particularly significant. This means that China faces challenges in its transition from manufacturing to content. This is in stark contrast to the development path of countries such as South Korea and the United States, which focus on core cultural content such as film, television, music, and games [12]. China has failed to effectively form a virtuous cycle of independent intellectual property rights driving exports.

Importantly, the rise of the Belt and Road market provides a new way to solve this structural dilemma. Analysis shows that the proportion of cultural trade between China and countries along the Belt and Road Initiative has soared from 13.5% in 2012 to nearly 30% in 2023, making the region an important export market for Chinese cultural products and a new growth engine.

Currently, China's cultural trade mainly relies on developed markets, while emerging markets can effectively reduce dependence on traditional developed economies and enhance the resilience and security of foreign trade [27]. At the same time, countries along the Belt and Road Initiative have a stronger cultural affinity with China, providing China with a market with relatively low cultural discounts [29]. Taking the lead in gaining recognition and popularization of cultural content in countries along the Belt and Road Initiative is a more feasible and realistic path for the transformation and upgrading of China's cultural industry.

Conclusion and policy recommendations

This article draws four key conclusions from its study of China's cultural products trade from 2004 to 2023.

First, China's cultural industry has achieved significant growth in both scale and trade volume, highlighting its importance as a new pillar of the economy and a key link in the global supply chain. Second, there is a serious imbalance in the trade structure. Advantageous industries are heavily concentrated in cultural manufacturing, while core content products such as publications account for only 3.1%, and a persistent trade deficit exists. This reflects China's structural dilemma: strong cultural product manufacturing capabilities but weak content creation capabilities. Third, dependence on developed markets carries significant risks. Faced with globalization challenges and geopolitical conflicts, China's cultural product exports face potential risks, posing a challenge to the sustained and stable growth of trade.

Fourth, the market landscape is undergoing significant transformation. While traditional European and American markets remain dominant, trade with countries along the Belt and Road Initiative is rapidly growing, becoming a new growth point.

Based on the findings of this study of China's cultural products trade from 2004 to 2023, policymakers should implement the following comprehensive measures to promote industrial transformation and upgrading. First, to address the imbalance in trade structure, the government should strengthen content innovation and intellectual property protection. By establishing special funds and improving the legal framework, it should incentivize the development of core content products such as film, television, and publications, thereby enhancing added value and international competitiveness. Second, it should optimize the trade structure and provide tax incentives and export subsidies to disadvantaged industries, such as publications, to narrow the trade deficit. Furthermore, to reduce the risk of dependence on developed markets, it should deepen regional cooperation under the Belt and Road Initiative and utilize market diversification strategies to mitigate geopolitical shocks.

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Поступила: 30.09.2025 Принята к печати: 30.10.2025

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