

Nepal-German Chamber of Commerce and Industry

NGCCI NEWS

Volume -XIX, No. 1, September 2010



EXPORT SECTOR Paper and Office Supply



CMT International Fair 2010

NGCCI coordinated country's participation at the annual Caravan, Motors and Tourism Fair (CMT) 2010 in Stuttgart, Germany



7 German Tea & Coffee Delegation

Official visit from Tea & Coffee Delegation from Germany led by Mr. Thomas Holf at NGCCI on April 1, 2010



5 Domotex 2010 Fair

NGCCI in association with NCEA and TEPC organized Delegation to Domotex 2010 in Hannover, Germany on Jan 18, 2010



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NGCCI NEWS

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Publisher:

NGCCI

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Design and Layout:

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Cover Photo:

Paperworld Nepal

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Preface



Dear NGCCI Members,

We are very happy to present you the revised edition of the NGCCI Newsletter "NGCCI News", which comes up in a new design and with new contents. We put a lot of efforts into this publication, which will be published regurlarly, with the objective to provide you with more business information as for example about specific export markets and important business events.

We are happy to announce that we have new support from Germany in our office. Mr. Sebastian Metz, CIM-Expert for export promotion and business development between Nepal and Germany, who had worked before in Algeria and now put all his energy into this new challenge in Nepal, joined our office in February 2010. We hope, with Mr. Metz, NGCCI will further enhance its activities and services to members and non-members and foster the trade and investment relations between Nepal and Germany.

NGCCI realized lots of successful business programs: NGCCI organized a High Level Business Delegation to Germany on the occasion of 50th Anniversary of Nepal German Diplomatic Relations in major cities of Germany to promote and develop a stronger relationship between the professionals of business communities of Nepal and Germany. NGCCI organized a very successful high-level delegation to CMT Stuttgart with the participation of Hon'ble Mr. Sharat Singh Bhandari, Minister for Tourism and Civil Aviation. In January NGCCI organized another high-level delegation to Domotex in Hannover – world's biggest carpet trade fair – again with the participation of Hon'ble Minister for Tourism and Civil Aviation. Furthermore NGCCI received a tea & coffee delegation from Germany and an official visit from SES. In order to enlarge our activities NGCCI will organize regularly the NGCCI Stammtisch the business networking event for and with NGCCI members. We will continue to put our efforts into the organization of more events from which our members can benefit.

Any suggestions how we can further improve the "NGCCI News" are most welcome and will take into consideration for the next issue.

> Khapaliya Rohini Thapaliya

> > President



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News and nggci activities

- NGCCI Export Promotion Programme
- Participation on CMT 2010 Stuttgart
- Delegation to Domotex 2010
- Meetings with IHKs
- Farewell of Mr. Meyer, Deputy Chief of Mission in German Embassy
- Official Visit from Senior Expert Service (SES)
- German Tea and Coffee Delegation
- Member Interaction Day
- 1 1 St NGCCI Stammtisch Business Networking Event

NGCCI Export Promotion Programme

ince February 23,2010 Sebastian Metz, CIM-Expert for Export Promotion and Busi ness Development, joined the office of Nepal-German Chamber of Commerce and Industry (NGC-CI). He supports NGCCI to further enhance its activities and services to members and non-members and to foster the trade and investment relations between Nepal and Germany.

The assignment was made possible due to the close cooperation between NGCCI, GTZ and CIM. The Centre for International Migration and Development (CIM) - a joint operation of the German Technical Cooperation (GTZ) and the German Federal Employment Agency (BA) - is the human resources placement organisation for German Development Cooperation. CIM-Experts and the different GTZ-projects in Nepal have a close relationship and work in a complementary manner together in order achieve the common goals of the German Development Cooperation.

In order to support the export activities of Nepalese companies and their entry on foreign markets – especially on the German market – Mr. Metz worked out an Export Promotion Programme, which had been presented during the Interaction Day Programme on the 19th May to the NGCCI-Members. This programme aims to help Nep

alese companies to find business partners abroad and to promote Nepalese exports products on foreign markets. In this regard NGCCI's export promotion programme also assists Nepalese companies to attend as well as to expose on international trade fairs in Germany. German trade fairs are one of the best possibilities to build up an international business network and to promote products in the international market.

In order to improve the knowledge about foreign markets and present business opportunities NGCCI aims to foster its publication service and will circulate business related information through its established communication channels as for example the NGCCI-News and through organising seminars and workshops about specific business topics.



Sebastian Metz, CIM Expert for Export Promotion

NGCCI is a bilateral chamber of commerce and offer also to German companies, which like to build up business relations or intensify their engagement in Nepal, a wide spectre of services. Besides, NGCCI invites German and Nepalese companies to become member of NGCCI to benefit from its large business-network. NGCCI continues to enhance its activities and services in order to respond on the needs of Nepalese and German companies.

NGCCI's services are classified as follows:

Business Service:

In order to support your market entry and business activities in the respective market NGCCI provides services like:

- General economic information
- Address research
- Business partner research
- Organization of B2B-meetings
- Legal and custom information

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Publication Service:

NGCCI-members and partner organisations in Germany and Nepal receive the regurlarly published "NGCCI-News", which contains useful information about German-Nepalese business topics. Furthermore NGCCI is publishing the Member Directory that contains useful contacts information. NGCCI provides also on its homepage (www.ngcci.org) information about the Nepal-German business relations.

Trade Fair Service:

NGCCI-Members receive further information about trade fairs in Germany - world's leading trade fair destination - and assistance in order to attend the adequate business event - as visitor or exhibitor.

NGCCI-Stammtisch:

NGCCI-Members and partners are invited to the regularly organized Business Networking Event, called "NGCCI-Stammtisch".

Business Delegations:

NGCCI organizes business delegations to Germany and Nepal.

Trainings / Workshops / Seminars:

NGCCI organizes with partner organisations workshops and seminars about different business topics.

Visa Service:

In cooperation with the German embassy NGCCI provides - after document-verification - a visa-recommendation letter joining your visa application.

Trade and Legal Assistance:

NGCCI helps to find a convenient solution in cases of trade and payment problems with your business partner.

Agreements for NGCCI-Members:

NGCCI will conclude further agreements with service companies like airlines and hotels in order to provide NGCCI-Members with attractive tariffs.

Human Resources:

NGCCI helps European students to find an internship in Nepal. Students who like to enlarge their professional and personal international experience are invited to address their application to NGCCI.

Participation on CMT 2010 Stuttgart

tion at the annual Caravan, Motors and Tourism Fair (CMT) 2010 in Stuttgart, Germany in cooperation with Nepal Tourism Board (NTB) GTZ Nepal, National Tea and Coffee Development Board and Honorary Consulate General of Nepal in Stuttgart Mrs. Ann Katrin Bauknecht. CMT is the Europe's largest public exhibition for tourism and leisure caravan and motor which was staged at the New Stuttgart Trade Fair Centre from January 16- January 24, 2010.

GCCI coordinated country's participa

Nepal German Chamber of Commerce and Industry (NGCCI) has been coordinating the country's participation in CMT at Stuttgart, Germany since 1994 in cooperation with Mrs. Ann Katrin Bauknecht Honorary Nepalese Consul General of Stuttgart. Nepal first participated at the Fair in 1994 with a small information counter. In 1995 Nepal at the invitation of the state of Baden Wuttertemberg and Messe Stuttgart participated as the partner country. Since then, Nepal is taking part at the fair regularly.

To present and promote Nepal as holiday-destination for the German as well as European market, disseminate Nepal as a safe destination to travel, promotion of business contacts between travel and tour operators and promote Nepal Tourism Year 2011, Nepal Tourism Board along with Royal Mt. Trekking Pvt. Ltd., Nature Trail Travel & Tours Pvt. Ltd., Om - Mane Trekking P. Ltd. Saathi Nepal Travel and Tours Pvt. Ltd participated as exhibitors in the Nepal Stall.



NGCCI Officials, Exhibitors with Lord Mayor of Stuttgart Dr. Wolfgang Schuster and Honorary Consul General of Stuttgart Mrs. Ann-Katrin Bauknecht



Hon'ble Minister for Tourism and Civil Aviation Mr. Sharat Singh Bhandari led the Nepal Delegation to CMT 2010. The other Members of Delegation are NGCCI President Mr. Rohini Thapaliya, Immediate Past President Mr. B.K Shrestha, Executive Member Mr. Krishore Raj Pandey Executive Member Mr. Herbert Wesely, NGCCI Chief Executive Officer Ms. Saraswati Maharjan, Member Mr. Alex Lal Muktan, Mr. Jitendra Bhattarai , Officer, NTB and Mr. Rajendra Bajgain, Gorkha Encounters

Minister Bhandari addresses Press Conference

Hon'ble Minister for Tourism and Civil Aviation Mr. Sharat Singh Bhandari addressed a Press Conference organized at the CMT 2010 in Stuttgart Germany on Jan 19, 2010 to update the tourism trade situation of Nepal and proclaim Nepal Tourism Year 2011.

The new and attractive DVD was presented by Nepal Tourism Board showing prominent features and giving important information about Nepal as a favourite Tourist Destination. Press Conference was attended by National and International Journalists including representative from CMT Messe.



From left: NGCCI President Mr. Thapaliya, Hon'ble Tourism Minister Bhandari, Honarary Consul General Mrs. Bauknecht, Mr. Messner and Ambassador Mr. Pradhan at the Press Conference in CMT

Famous Mountaineer and Nepal friend and patron Mr. Reinhold Messner attended the press conference as main speaker whose presence also guaranteed maximum media attention.Mr. Messner broke a lance for the soft Tourism in Nepal, the main source of income for Nepal. He is planning a tour in the spring in the Annapurna region. He said, "New Trekking routes to explore, with road construction change many future paths, new ways are sought so."

President of NGCCI Mr. Rohini Thapaliya presented the current scenario of Tourism in Nepal and stated that the presence of Hon'ble Minister for Tourism Mr. Bhandari itself shows the commitment for the promotion of Tourism in Nepal and expressed his willingness to welcome all in the Land of Himalayas.

Ambassador of Nepal to Germany His Excellency Mr. Suresh Pradhan thanked all those concerned for organizing the event and also urged the Germans to work together to further enhance business activities between the two countries.

The programme was followed by questions and answers from the journalist audience. Token of appreciation was also presented to Mr. Messner, Mrs. Bauknecht and H.E Mr. Pradhan at the programme.



Hon'ble Minister Bhandari, Mr. Messner, NGCCI President Mr. Thapaliya, Immediate Past President Mr. Shrestha, other delegates and participants at Nepal Stand

Nepal Evening at Mercedes-Benz Museum

Nepal Evening was also organized on the same day with special guest speaker Reinhold Messner at Mercedes-Benz Museum Stuttgart which was hosted by Mrs. Bauknecht, Honorary Consul General of Nepal in cooperation with the Mercedes-Benz Company and Nature Life International.

Hon'ble Tourism Minister Mr. Bhandari addressed the gathering and shed light on Nepalese tourism and Nepal Tourism Year 2011.

Mr. Messner did long presentation in Germany regarding his mountaineering experience in Nepal which was able to provide wide publicity to Nepal. Mr. Messner's brilliant lecture and the high level reception afterwards with more than 300 VIP guests attending at the beautiful Mercedes-Benz Center in Stuttgart, the home

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base of Mercedes-Benz, was a great success and has been an outstanding evening which brought a lot of publicity for Nepal.

Ambassador Mr. Suresh Pradhan, CMT Delegates, Mr. Rohini Thapaliya, President of NGCCI, Coordinator Mr. Kishore Raj Pandey, CEO Ms. Saraswati Maharjan, Member Mr. Alex Lal Muktan from NGCCI and other participants were also present at the programme.

Nepal Stand at the main entrance of the main Hall No. 4 Touristik Hall the most prominent hall at Prime loca tion covered with beautiful painting of Mt. Everest at back and the Shyambhu Stupa at the top and decorated with prayer flags was able to reflect the glimpse of Nepal. The exhibitors with their professional German partners and attractive holiday packages attracted lot more visitors at the Nepal stall.

Nepalese high quality orthodox tea was also served free of cost to visitors as refreshment in cooperation with NGCCI Member All Nepalese tea and coffee Centre and National Tea and Coffee Development Board.

Delegation to Domotex 2010

GCCI in association with NCEA and TEPC organized Delegation to Domotex 2010 in Hannover, Germany on Jan 18, 2010. Deutsche Messe organized a luncheon programme in the honor of the Nepalese Official delegation to Domotex 2010 led by Hon'able Tourism Minister Sharat Singh Bhandari. President of NGCCI Mr. Rohini Thapaliya, NCEA Treasurer Mr. Lalit Kumar Agrawal, Executive Advisor Mr. Surendra Dhakal and Deputy Executive Director of TEPC Mr. Dinesh Gupta were also present at the luncheon. The Delegates had brief meeting with the chief of Deutsche Messe AG Dr. Andreas Gruchow at Contract World. Dr. Gruchow informed Nepalese delegation about the trend of Domotex, ever increasing competition among carpet exporting countries and level of participation in the Domotex. Hon'ble Minister Bhandari shed light on improving Nepalese political situation and the emphasis given by the government for the promotion of the export.

After the meeting Nepalese delegation visited the stalls of Nepalese carpet importers and exhibitor from Nepal, Kantipur Carpet Craft Industry.

Nepal Evening in Domotex 2010 Fair

NCEA in association with NGCCI and TEPC organized Nepal Evening at Berlin Hall of Fair Premises. On the occasion, Hon'ble Minister gave away largest carpet importer award to Mr. Maurizio Maljevac of Ludwig Wissenbach GmbH and Mr. Juergen Deutmeyer of OCI. Similarly Hon'ble Minister also presented token of appreciation to Mr. Martin Folkerts and Ms. Maike Marienfeld.

Addressing the guests, officials of Deutsche Messe AG and Reporters, Chief Guest of the Evening Hon'ble Minister Bhandari informed that peace process in Nepal was near to a logical end and then after political stability a growth engine for economic development in the country would prevail. As the main agenda of all the political parties has been a sustainable economic development of the country through export promotion, carpet will be a sector to revive at its utmost, he added. For this, the government of Nepal has decided to form a High Level Task Force (HLTF) on Carpet. Such a body will forward the suggestions to the government to be implemented within this year, he informed.



Hon'ble Tourism Minister Bhandari addressing at the Nepal Evening programme in Domotex 2010

Welcoming the guests at Nepal Evening, President of NGCCI Mr. Rohini Thapaliya said that Nepal and Germany had marked fifty years of their Diplomatic Relations last year. Germany has remained as before major trade partner in carpet sector and thus the carpet importers from Germany have always been Nepal's trade ambassadors in Europe and suggestion put forward by them can be pertinent to revive the industry, he added.

Speaking on behalf of German Importers, Mr. T Graebner suggested that the German importers frequently visiting Nepal for trade purpose should not be given hassles in immigration. The Nepali carpet was awarded prestigious Carpet Design Award in Domotex 2010.

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Meetings with IHKs

uring CMT Delegation a brief meeting was held with Mr. Tassilo Zywietz, Managing Director, Foreign Trade and Services and Mr. Julio Neto, Deputy Managing Director of Stuttgart Chamber for mutual cooperation between IHK Stuttgart and Nepal German Chamber of Commerce and Industry on Jan 20, 2010.



Delegates at the meeting with IHK Stuttgart

Hon'ble Minister, Ambassador Pradhan and Mrs. Baukneckt, President Rohini Thapaliya, Coordinator Kishore Pandey, CEO Saraswati Maharjan and other members of delegation were present at the meeting.

Meeting with Offenbach and Frankfurt Chamber

CEO Saraswati Maharjan had meeting with Mr. Jurgun Brautigam and Mrs. Barbara Daniel Consultants of International Department of Offenbach Chamber of Commerce and Industry on Jan 26, 2010.

Likewise she had also meeting with Ms. Monika Goldbach, Director for International Business, Frankfurt Chamber of Commerce for mutual cooperation.

Farewell of Mr. Meyer, Deputy Chief of Mission in German Embassy

resident Mr. Thapaliya hosted a dinner reception on April9, 2010 at his residence on behalf of NGCCI to bid farewell to outgoing Deputy Chief of Mission at German Embassy Mr. Norbert Meyer and Madam Catherine Meyer. Mr. Thapaliya thanked Mr. Meyer for the continuous support to the chamber and its activities during his tenure.

Mr. Meyer, who was in Nepal since July 2005 expressed that his stay in Nepal is always memorable. He said, NGCCI has made considerable effort to strengthen the bilateral trade and investment between Nepal and Germany since its inception and also wished for success in its future efforts.

A token of appreciation was also presented to Mr. Meyer and Madam Catherine Meyer.

NGCCI Executive Board Members, representatives from German Embassy, representatives of diplomatic corps and leading businessmen were present at the function.

Official Visit from Senior Expert Service

roject Coordinator (Asia) SES, Germany Ms. Ulrike Puetz, on her visit to Nepal visited NGCCI with Mr. Harihar Subedi, Resident Representative SES on March 11, 2010. They had brief meeting with CEO Saraswati Maharjan and CIM Expert Mr. Sebastian Metz. Matters of mutual cooperation were discussed at the meeting. Ms Putz and Mr. Subedi expressed their willingness to work together to enhance mutual endeavors.



Mrs. Puetz, SES-Coordinator for Asia, Ms. Maharjan, CEO NGCCI and Mr. Subedi, SES-Representative in Nepal

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German Tea and Coffee Delegation

group of Tea/Coffee Delegation from
Germany led by Mr. Thomas Holf visit
ed NGCCI on April 1, 2010 coordinated by
NGCCI Member Mr Udaya Chapagain. President Mr. Thapaliya welcomed the delegates and briefed about chamber activities



Tea Delegates during meeting at NGCCI

The delegates had brief meeting and interaction with President Mr. Thapaliya and NGCCI Members from Tea and Coffee sector present at the meeting.

Member Interaction Day

n the May 19, 2010 NGCCI organized a Member Interaction Day in order to present Mr. Metz, CIM-Expert for Export Promotion, and his newly worked out NGCCI Export Promotion Programme to the NGCCI-Members. After the programme presentation NGCCI-Members used the opportunity to pose further questions about the programme. Furthermore NGCCI-Members discussed about actual export issues they are confronted with. Consequently, NGCCI will adapt and improve its services in order to respond to the needs of member companies in order to enhance their competitiveness and enlarge their international business network. The Interaction Day had given also the possibilities to strengthen the ties between NGCCI-Members.



Participants on Member Interaction Day

1st NGCCI Stammtisch – Business Networking Event

epal German Chamber of Commerce and Industry organized "NGCCI-Stammtisch" – the Business Networking Event for Members on July 30, 2010 at Hotel Malla, Kathmandu.



Participants on the 1st NGCCI Stammtisch - the Business Networking Event

The main objective of NGCCI's first "NGCCI-Stammtisch" – the Business Networking Event for and with NGC-CI-Members – was to update members about possibilities to develop business abroad, to inform about up-coming business events and NGCCI-activities and to give the opportunity to get in contact with other NGCCI members.

Welcoming the participants President of NGCCI, Mr. Rohini Thapaliya, shed light on NGCCI programs and up-coming activities. Mr. Sebastian Metz, CIM-Expert for Export Promotion at NGCCI, presented the Export Promotion Program, which aims to help Nepalese companies to find business partners abroad and to promote Nepalese export products on foreign markets. Ms. Shusmita Malla from GTZ/CIM - the human resources placement organisation for German Development Cooperation, presented different programs of GTZ/CIM in Nepal and the possibilities how Nepalese companies can benefit from these programmes.

The programme was followed by active interaction with the participants which was focused on hydropower and renewable energy, tourism, nepalese coffee and members' business activities.

The programme was moderated by Vice President and Membership Committee Coordinator Mr. Senon Dorje Lama. Around 50 member companies and their business partners participated in the program. The program was also attended by representative from the German Embassy Ms. Ulrike Kochalski.

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Economy

- Nepal-German Foreign Trade
- Export Sector Paper And Office Supply
- Presentation Of NGCCI-Members

Nepal-German Foreign Trade

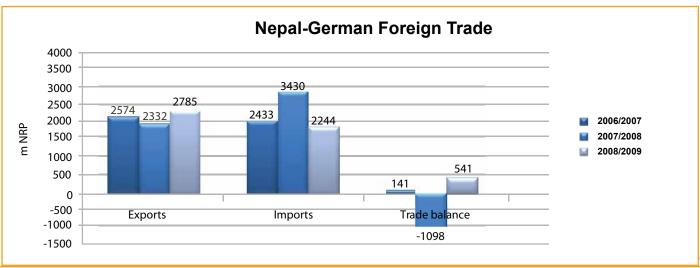
he overall Nepal-German foreign trade had declined in the period of the fiscal year (FY) 2008/2009. The total bilateral trade fall from 5,762 million NRP to 5,029 million NRP which stands for a decline of 13%. Contrarily to the development of the overall Nepal-German trade, Nepalese exporters raised their business with Germany by 19.4% to 2,785 million NRP in FY 2008/2009.

Increasing exports and sharply declining imports from Germany – by -34.6% in comparison to FY 2007/2008 to 2,244 million NRP – had turned the trade balance into a surplus of 541 million NRP. In FY 2007/2008 the bilateral trade balance had turned for its first time into a trade deficit for Nepal because of shrinking exports and sharp increasing imports from Germany.

The increase of exports to Germany was in major parts driven by an increase of the export categories "Textiles, clothing and accessories" (+11.6%) and "Others" (+388%). Especially products like woolen shawls (+195%), apparels (+64.1%) and paint ings (+765%) increased in the bilateral trade while the export of carpets dropped from 1.67 bn NRP to 1.45 bn NRP (-13.2%). Textiles and apparels are the major export products and make more than 80% of the total exports. Remarkable is the develop

ment of Nepalese exports of paper and office products which increased by 66.4% in comparison to the previous year. These products seem to have a good potential to be merchandised in Germany. More information about this export sector and business opportunities for Nepalese exporters are given in another article of this newsletter edition.

Export category	Value in FY 07/08 in '000 NRP	Value in FY 08/09 in '000 NRP
Food (+Tobacco)	66.359	63.296
Minerals products	271	39
Chemical, pharmaceutical substances and plastic	8.942	8.469
Leather and articles thereof	18	7.259
Wood and articles of wood and Paper products	23.017	42.810
Textiles, clothing and accessories	2.077.408	2.318.511
Glass, ceramics, stones and articles thereof	13.197	24.188
Metals and articles thereof	7.171	6.119
Machinery and electrical equipment	83.715	70.500
Vehicles	2.457	2.381
Others	49.495	241.475
Total	2.332.051	2.785.047





The decrease of imports was mainly caused by the shrinking imports of "Machinery and electrical equipment" (-50.6%) from Germany as well of metals products (-67.7%). Machinery and electrical equipment are the major imports goods from Germany and stands for almost 50% of the total imports. Whereas, the imports of wood and paper products (+304%; esp. of newsprint rolls) as well as of chemical and pharmaceutical substances (+23.9%) increased in the FY 2008/2009 in comparison to the same period of the previous year.

Imports category	Value in FY 07/08 in '000 NRP	Value in FY 08/09 in '000 NRP
Food (+Tobacco)	186.001	163.351
Minerals products	2.786	22.672
Chemical, pharmaceutical substances and plastic	188.520	233.5432
Leather and articles thereof	0	17
Wood and articles of wood and Paper products	38.243	154.648
Textiles, clothing and accessories	1.180	18.311
Glass, ceramics, stones and articles thereof	14.904	42.181
Metals and articles thereof	357.859	115.646
Machinery and electrical equipment	2.244.064	1.108.832
Vehicles	91.209	121.409
Others	298.580	263.825
Total	3.430.346	2.244.435

(Source: Trade and Export Promotion Centre)

Export Sector: Paper And Office Supply

nformation about foreign markets and market entry strategies are crucial for export companies. Which (new) target market(s) should you aim for and which key product(s) should you choose? Which trade channel fits your company best and how do you promote yourselves to potential buyers? These are some of main questions for an exporter. NGCCI wants to support Nepalese exporters and its members doing business on foreign markets and presents therefore in every edition of "NGCCI-News" an export sector. The

following market information are mainly based on market research documents published by the Centre for the Promotion of Imports from developing countries (CBI). For further research information visit the homepage of CBI, www.cbi.eu.

The following export sector presentation is about the "Stationery, office and school supply sector". NGCCI decided to present this sector because the Nepalese paper and office supply sector is continuously developing its market abroad. Nepalese exports of paper products raised by 37.5% in FY 2008/2009 - from 408 m NRP in FY 2007/2008 to 561 m NRP in FY 2008/2009. Nepalese companies can further enhance their position on the international market if their efforts are supported – amongst others - by given professional and valued information.

A lot of homework needs still to be done in order to achieve the goal of a higher international market share. The Nepalese paper sector needs to strengthen its export activities and promote their products internationally in more professional way. Furthermore there is a need of being more aware of necessary product innovations and adapting continuously the products to international trends (design and useability).

The following information is after all not only of interest for the paper sector. In our "Info-Boxes" we want to point out useful information for every exporter.

Sector Presentation

The product groups of the stationery, office and school supplies sector are: paper-based items, filing products, storage products, writing and drawing instruments, presentation and planning materials, office & desk accessories, greeting cards, cases and satchels, and office furniture. Considering Nepalese industry structure we focus some information on paper-based items, filing products, storage products, office & desk accessories, greeting cards and cases and satchels.

Consumption in EU and Germany

Total EU stationery consumption is estimated to be around € 18 billion (2007). During the period 2004–2007, EU consumption grew by 1.6% in total. The market for stationery in Europe used to be considered a mature and saturated market, with a high level of replacement purchases.

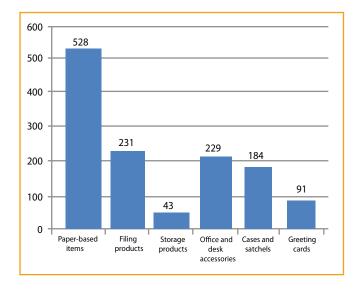
Forecasts for the total market size of the stationery sector in the coming years indicate that the market will increase slightly, by 1 - 1.5% per year. Some EU countries,

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mainly in Central and Eastern Europe, are growing faster than others, but the biggest markets - such as Germany, the UK, France and Italy - will achieve only small increase.

The total consumption of stationery in 2007 in Germany amounted to \in 3.3 billion. The German market accounted around 19% of the total EU stationery consumption in 2007 and it is the largest consumer of stationery items. Between 2004 and 2007 total stationery consumption in Germany decreased by around 0.2% annually. German consumers are increasingly putting price above all other considerations when purchasing stationery, leading to a declining market in absolute value terms. Consumption in Germany is forecast to remain stable during the coming two years.

German consumption of selected products groups (in million Euro)



Market segments

Customers for stationery can be separated into four different segments: professional users, (including large offices), schools and universities, small office and home office (SoHo) users and private users. Professional users, together with the SoHo users, account for the major share of stationery expenditure.

The professional user generally considers stationery to be a commodity; and in principle puts cost and economic considerations before fashion appeal. A prime requirement next to product pricing and quality is reliable (next-day) delivery.

Most schools and universities are subsidised by the government, and they receive a yearly budget per pupil/student. The trend of school-going population in Europe is expected to decline in the future due to low birth rates. School enrolments generally do not correlate with economic conditions. This is why the school stationery market is generally less sensitive to economic cycles than the other market segments.

The SoHo users, like the professional users, value quality and functionality. The SoHo users, however, are also sensitive to design and colour. SoHo users, in general, do not want to spend too much time or money purchasing commodity stationery.

Largely due to the individualization trend, the stationery needs and preferences of the private users have changed and diversified over the recent years. There is, however, still a distinct difference between commodity and speciality stationery. For commodities, price is generally the main purchase criterion. In the specialty segment, product quality, branding and design are important purchase criteria. Stationery in this segment must be able to satisfy consumer status expectations.





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Production in EU and Germany

In 2007, EU production totalled € 27.5 billion, an overall increase of 8% since 2003. Italy was the country with largest production in the EU, accounting for 24,9% of EU production, followed by Germany, the United Kingdom, France and Spain. European production of stationery is expected to remain stagnant overall in the coming future. Nevertheless, Eastern Europe and other lower-cost EU members such as Poland are to expect increase in the manufactured levels. In pursuit of greater efficiency, many Western European manufacturers are seeking to establish or buy manufacturing bases in low-cost countries, often in Asia and also closer to home, in Eastern Europe.

Because of increasing competition, manufacturers are searching for ways to differentiate their products from their competitors', in order to drive growth in the mature stationery market. Product and design innovations are important means for manufacturers to extend their market.

Estimated total production of German stationery for 2007 was € 5.3 billion. German production accounted for around 19% of total EU production in 2007. Total German production in the stationery market has increased over the last few years by about 1.2% annually. Analysis show that stationery production in Germany was stable over recent years and is expected to remain so in the coming years.

Trade Channels

Office & school supplies are distributed through many different trade and retail channels. In the past decade, mergers and acquisitions have been a continuing feature of this industry. Consolidation is still occurring, but at slower pace than in the previous years. There are several different types of trade channels, which take stationery products from manufacturers to the end users, each with a slightly different role.

Publishers

Besides designing their own stationery, publishers are also active in the development and marketing of licensed stationery. They make use of the intellectual property of other companies to help sell their products. Through a licence agreement with the holder of the intellectual property rights of a brand, trademark, patent, character, etc., the company is authorized to make use of the property right under certain defined circumstances.

The company has to pay a fee when making use of the intellectual property of another company. The publishers mostly concentrate on the design and the marketing aspects of the products, outsourcing the production of their stationery to manufacturers in low-wage countries, but manufacturers in Europe are also important sourcing locations, because of the shorter supply lines.

Agents

Agents are intermediaries who have the legal authority to act on behalf of the manufacturer, although they do not take legal title to the product. Their prime function is to bring buyer and seller together and act as an intermediary between them.

The agent receives a commission from the manufacturer. Most agents represent more than one manufacturer, although they usually try to avoid acting for competing companies.

Buying Groups

The role of buying groups is very important in the market for stationery, office & school supplies. Buying groups are individual dealers / wholesalers / retailers who cooperate as a single buying and marketing force. A buying group will have a central buying department and most of them hold inventory so that the group also acts as wholesaler and distributor.

Importers / Wholesalers

Generally the importer / wholesaler distributes stationery to all sorts of retailers, from independent stationery shops to contract stationers. In addition to their primary tasks of buying and selling, managing import and export formalities, and holding stock, they can supply considerable information and guidance to a manufacturer.

Contract stationers

Contract stationers are involved in business-to-business sales of stationery, computer supplies, office furniture, and similar products. Contract stationers usually supply medium and large professional users. The latter however generally account for the lion's share of their business. Contract stationers source most of their stationery directly from the manufacturers; however agents and importers are also used.

Complementary to the trade channels there are various retail channels which will not be detailed any further in this edition.



N_{GCCI} N_{EWS}

Conclusion for your business

Among the many trading partners, you must identify those who match your own company profile and product range and are therefore most suitable for building up a relationship. Finally, the optimal trading partners will have to be chosen based on a well-founded SWOT (Strength, Weakness, Opportunities and Threats) analysis by each individual manufacturer.

INFO-BOX: Price Structure

The price levels in the entire supply chain are for the major part determined by the end-users and the market: "How much are they willing to pay for the product?". Due to the fact that the price, which the end-user is willing to pay, is determinant, it is of utmost importance for all players in the chain to know the end-user prices. The end-user prices are often called Retail Selling Prices (RSP) as that price is what all players in the entire chain will have to divide among themselves for the work they do: retailing, marketing, distribution, wholesaling, importing, transportation. They also have to bear in mind that sufficient money should be left to cover production costs plus, of course, the manufacturer's profit.

After the intermediaries' average margins are determined as a percentage of the RSP, it is possible to calculate the estimated FOB selling price. This will enable exporters to estimate their possible profit margin knowing the cost of inland transportation, loading and manufacturing.

The margins may vary per product, product group or negotiating power of the players and could be subject to change.

Desk (mainly internet) research as well as field research (shopping in the market place and visiting trade fairs) are of the utmost importance in tracing up to date RSP's.

Information on duties for specific products can be found at: http://ec.europa.eu/taxation_customs/dds/cgi-bin/tarchap?Lang=EN .

Trade: Imports & Exports in EU and in Germany

Total EU imports amounted to \in 12 billion in value in 2008. In comparison to 2004, imports have increased by 17.9%. Total EU imports increased by 4.2% on average annually in terms of value in the period 2004-2008.

Between 2004 and 2008, total imports from developing countries (DC) increased by 48% in value - 10.3% on average annually since 2004. Developing countries' share of EU imports is steadily increasing. The share of imports from developing countries grew from 10.4% in 2004 to 20.1% in 2008, \in 1.6 billion and \in 2.4 billion in value respectively.

China (15%) accounted for the major share of the EU's total imports from developing countries in 2008.

Many emerging countries have set up their own stationery industry, dedicated to low-priced exports. At the same time, many EU manufacturers have shifted their production to these countries, in order to combine their efficient and high-quality production systems with the low labour costs in these countries.

The EU countries are the leading exporters of stationery in the world, with Germany, Italy and France being among the world's largest exporting countries. In 2008, total exports from EU countries were valued at € 12.4 billion. Between 2004 and 2008, EU exports grew by 18%.

EU imports by product group:

Product Groups	EU-Im- ports in 2008 (mil- lion Euro)	Dev. during 2004-2008 (in %)	Dev. of imports from DC (2004-2008, in %)
Paper- based products	3,100	19.7	44.8
Filing products	547	34.7	94.1
Storage products	175	-2.8	-15.6
Office and desk accessories	3,400	11.3	46.0
Greeting cards	392	13.0	52.0
Cases and satchels	591	42.0	43.0

Total imports into Germany in value were € 1.8 billion in 2008. 22% of total imports in value came from developing countries. In 2008, Germany accounted for 15.2% of total stationery imports by EU countries, making it the largest importer in the EU ahead of the UK, France and Belgium. Total imports have increased by 17.1% since 2004.

The largest product group in German stationery imports in 2008 was Office and desk accessories (34%), followed by Paper-based items (22.1%). Total German imports of stationery products have increased between 2004 and 2008 at different rates for the various product groups. Furthermore, the developing country share varies between the product groups.



German imports by product-group:

Product Groups	Share of product group in comp. to total imports (2008, in %)	German imports dev. during 2004-2008 (in %)	DC share of German im- ports (2008, in %)
Paper-based items	22.1	22.5	21.1
Filing prod- ucts	4.4	73.6	13.3
Storage products	2.4	2.9	38.3
Writing and drawing instruments	17.0	12.9	34.5
Presenta- tion and planning materials	0.9	72.6	31.2
Office and desk accessories	34.0	14.3	10.0
Greeting cards	3.0	0.7	23.8
Cases and satchels	5.0	23.4	71.8
Office furniture	11.3	10.7	17.5

China is by far the biggest stationery supplier in total, accounting for 16.6% of total imports into Germany. At product group level, China leads the developing countries in exporting all products to Germany, except office furniture.

INFO-BOX: Market Access Requirements

As a manufacturer and/or exporter in Nepal preparing to access EU markets, you should be aware of the market access requirements of your trading partners and the EU governments. Requirements are defined through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns. You need to comply with EU legislation and have to be aw are of the additional non-legislative requirements that your trading partners in the EU might request.

For information on legislative and non-legislative requirements, go to 'Search CBI database' at http://www.cbi.eu/marketinfo, select market sector and the EU in the category search, click on the search button and click on market access requirements.

Information on tariffs and quotas can be found on the homepage of the European Commission – Department Taxation and Customs Union or at:

http://exporthelp.europa.eu/index_en.html

Presentation of NGCCI-Members

Paperworld Nepal

Paperworld Nepal Private Limited founded by Marie Jeanne Budé (an paper artist) and Nagendra Bhandari in 1997, unique among many other handmade paper manufacturers. The paper products are made from different combination of natural fibers, pulp and art materials. Our products have crossed the boundary of making only sheet papers to many office stationery, guests book, albums attractive packaging for cosmetics and jewelry, craft paper & curtain for home decoration to a fine art pieces made from handmade paper and fibers. Since all our products are handmade we give lot of employment to people thus more under privileged men and women from the mountain are directly benefiting from this work.

Paperworld Nepal employ 90% of skilled, semi skilled and unskilled women of total employees, enabling them self reliance, so that they do not need to depend on men to survive. Paperworld Nepal pays fair salaries to all employees and encourage them to perform better through incentives.

From the early starting of Paperworld we are organizing various workshop for paper artists and school children as well as providing trainings and seminars abroad on hand papermaking. Now Paper world is striving to develop new technology on recycling papers preventing Pollution, excess solid waste, reduction of fresh water consumption finally saving energy.

Nagendra Bhandari Managing Director

PaperWorld Nepal

G.P.O. Box 981

Hattigaunda, Kathmandu, Nepal

Tel: +977 1 4376 845 / 4372 884, Fax: +977 1 4378 179 Email: paperworld@mail.com.np; nepcraft@mos.com.np www.paperworldnepal.com



Bagmati Paper Industries Pvt Ltd

Bagmati Paper Industries Pvt. Ltd (BPI) was established on 1993. BPI is the company which produce Nepali handmade papers, note books, albums, gift boxes, bags, photo frame, stationery set and many paper products and export these products in Europe, USA, Japan and many Asian countries. Up to 1997 BPI was limited in domestic market only and realized that without exporting their products to the international market they could not achieve their goals, so keeping that in mind BPI started to participate in international trade fair. After participating in international trade fair (International gift show Osaka, Fukuoka, Tokyo in Japan, New York stationery Show, CHA show California, Paper World Frankfurt, Ambiante Frankfurt, Tendence Frankfurt, Hong Kong gift and premium fair etc) BPI succeed to take international market. BPI has been participating in international trade fair since 12 years.

Paper World, Germany show is the most important show for BPI where BPI receives so many orders from the biggest international big buyers. BPI is founder member of Nepal handmade paper Association and member of Federation of Handicraft association, Nepal Chamber of Commerce, Export council of Nepal, Nepal Germany chamber. BPI has been top 3rd, 4rth awarded from Handpass since last 5 year. BPI has been providing jobs to more than 100 staffs paying tax to government and incoming foreign currency for Nepal.

Bagmati Paper Industries Pvt Ltd

P. O. Box 11362

Sinamangal, Om Nagar, Kathmandu, Nepal

Tel: +977-1-4491080 / 4499554; Fax: +977-1-4493407

Email: bagmati@paper.wlink.com.np

www.bagmatipaper.com

Giftsland Enterprises Pvt Ltd

Giftsland Enterprises Pvt Ltd is a family owned and operated business which was established in 1978. Starting with exporting Nepalese handicrafts like silver jewelry and woolen products, Giftland Enterprises have focused, however, since two decades its business on manufacturing handmade eco-friendly paper and paper products.

Giftsland Enterprises manufacture and export superior quality handmade journals, stationery, decorative papers, bags etc. The main raw material for making our products is bark of the Himalayan Plant locally known as "Lokta" which grows in abundance in the Nepal's forest.

We are participating at Paperworld and Ambiente in Germany every year for the last two decades where we meet our clients, conclude new contracts and expose our hand crafted and 100% natural "Lokta" paper products.

We like to point out to our clients and end users the fair business practice and numerous employment opportunities that we are able to generate not only in our factory but also in many small scales cottage industries and cooperatives with which we work together. We think that these days the consumers not only care about the usefulness and quality of product but like also to know how and where the products are made and how the local community is benefitting.

Padma Ratna Dhakhwa Managing Director

Giftsland Enterprises Pvt Ltd

P.O. Box 1054

358 Nagbahal, Lalitpur-16, Nepal

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Cooperation

Cooperation between NGCCI and CIM

he Centre for International Migration and Development (CIM) has continually enforced its engagement in Nepal. Since April 2010 Ms. Shusmita Malla has been responsible for coordinating CIM in Nepal and is worldwide one of the few countrybased CIM coordinators. Ms. Malla focuses her activities in introducing and supporting CIM Programs in Nepal through acquisition and placement of CIM Returning Experts and Integrated Experts in Partner Organisations. She also helps CIM Experts to network with each other and with other development organisations. There are altogether 12 CIM Integrated Experts working for different Nepalese Organisation like Federation of Nepalese Chambers of Commerce and Industry, Local Development Training Centre, Urban Development Training Centre, National Business Initiative, Trade and Export Promotion Centre and International Centre for Integrated Mountain Development. Furthermore CIM has recently placed Mr. Sebastian Metz as an integrated expert for export promotion in the Nepal-German Chamber of Commerce and Industry (NGCCI).

In order to raise the awareness of the Nepalese business community regarding possible fields of cooperation with CIM, NGCCI and CIM began recently to cooperate. Besides various promotional activities, NGCCI assists CIM to find new contacts in the Nepalese business community accordingly to its search profile.

What is CIM?



CIM is the human resources placement organisation for German Development Cooperation. As a joint operation, it is supported by two strong partners, the Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH – German Technical Cooperation and the international Placement Service (ZAV) of German Federal Employment Agency (BA).

Our mission is to support our partners' contributions to their countries' development and the attainment of the goals set jointly by each partner country and the German Federal Ministry for Economic Cooperation and Development (BMZ). We accomplish this by supplying the demand of these countries for the kind of highly-qualified professionals they could not attract under customary national employment conditions.

Our partners are competent, independent employers within our partner countries' civil services, private sectors and civil societies. On their behalf, we recruit partner-country experts who have been educated in Germany and would like to

return totheir home countries. And also from European Union countries on the German labour market, CIM has two programs: Returning Expert Program and Integrated Expert Program. The placement of either Returning Experts or Integrated Experts is mostly determined by the respective priority areas of the official German Development Cooperation with Nepal. These are: Health, Local Governance and Energy. For the sustainable know-how transfer in sectors relevant to economic development and to help counter brain gain and have positive effect on national employment, CIM is focusing more on the Returning Expert program in Nepal.

Returning Experts Program

Returning experts who have acquired their professional skills in Germany have an important role to play in their countries of origin. When they are integrated professionally, they can make a sustainable contribution to the economic, technological and social development of their country. Their professional know-how is cutting-edge. They have international contacts, are at home in several cultures and speak at least two languages fluently.

The Returning Experts Program puts this potential to work for development. It supports the professional integration of university graduates and experienced experts from developing, emerging and transition countries, who have completed their training in Germany and are interested in returning to their countries of origin. The focus is on placing professionals in areas of particular relevance to development policy. In addition to placement and advisory services, the program offers financial support to experts interested in returning to their own countries. Employers, too, can benefit from program services such as assistance with recruiting employees.

In April 2010, CIM started its Returning Experts Program in Nepal and is looking now for partner organisations interested in hiring Nepalese experts graduated in Germany. Currently potential candidates from different fields like energy, forestry and agriculture, environment, and health are looking for a platform in Nepal to use their know - how learned in Germany. The CIM programme, which has now been operating successfully for more than 25 years, shows that one person can make a big difference: the right person in the right place can initiate important changes.

For further Information please contact:

Shusmita Malla, CIM-Coordinator

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E-mail: shusmita.malla@gtz.de Homepage: www.cimonline.de



IT'S PEOPLE

THAT MAKE A DIFFERENCE

THE RETURNING EXPERTS PROGRAMM E

Many people from developing, transition and emerging countries live and work in Germany, or have completed their education and training here. A large number of them are keen to use their special expertise to support development in their countries of origin and therefore decide to return. The Centre for International Migration and Development (CIM) advises them on this move, and places them with employers. We also provide financial benefits f or those who take up d evelopment-related jobs.

You can find all the r elevant details and a list of curr ent vacancies by visiting:

www.cimonline.de







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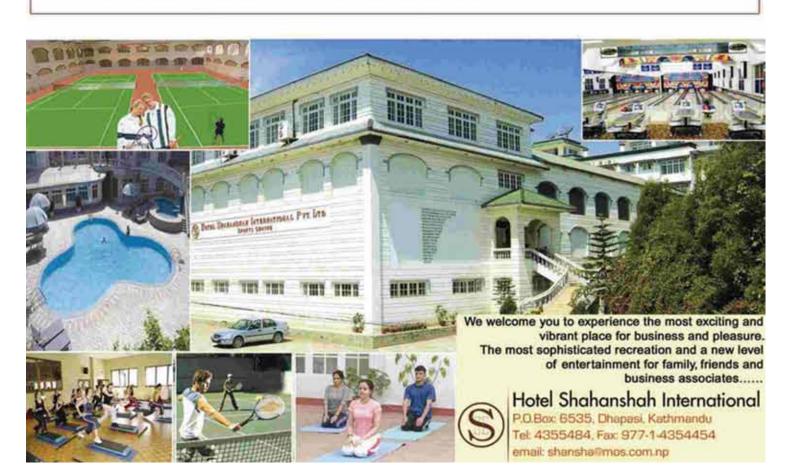
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New ngcci-members

Nine new companies have enrolled NGCCI Membership. NGCCI welcomes its new Members:

S.N.	Company	Sector	Website	Represented by
1	Ayurveda Health Home P. Ltd.	Ayurveda Health Service	www.ayurveda.com.np	Mr. Badri Koirala (Managing Director)
2	Around The Himalayas P. Ltd.	Tourism	www.aroundthehimalayas.	Mr. Sudama Karki Chhetri (Managing Director)
3	Shiva Treks & Expeditions P. Ltd.	Tourism	www.shivaholidays.com	Mr. Mangal Maharjan (Managing Director)
4	Sudeep International Trading	Medical and laboratory Equipments	www.sudeepintl.com	Mr. Bhakta Bahadur Hamal (Proprietor)
5	Association for Craft Producers	NGO	www.acp.org.np	Ms Meera Bhattarai (Executive Director)
6	Royal Mountain Travel P. Ltd.	Tourism	www.royalmt.com.np	Mr. Shiva Prasad Dhakal Managing Director
7	Kantipur Carpet Industries	Carpet	www.kantipurrugs.com	Mr. Lalit Kumar Agrawal (Managing Director)
8	Kathmandu Experience Travel & Tours P. Ltd.	Tourism	www.kettours.com	Mr. Arun Kumar Regmi (Managing Director)
9	Gurkha Encounters P. Ltd.	Tourism	www.gurkhaencounters.com	Mr. Rajendra Bajgain (Managing Director)



Nepal-German Chamber of Commerce and Industry

Connecting Business ...

NGCCI is the Service Provider for the Nepal-German Business Community



Our Services are:

- Business Service
- Publication Service
- Trade Fair Service
- Business Networking
- Business Delegations
- Trainings / Workshops / Seminars
- Visa Service
- Trade and Legal Assistance



Trade fairs

Focus: Fruit Logistica

Trade Fair Calendar 2010

Fruit Logistica - World's Leading Trade Faire for the International Fresh Produce Trade

RUIT LOGISTICA is the most important business and communication arena of the international fresh produce trade. The industry's key decision makers are there as exhibitors and trade visitors and have the opportunity of approaching potential business partners with their services/products.

This specialist trade fair offers the sectors connected with the fresh fruit and vegetable business an ideal opportunity to present their products across the entire added-value chain, from growing to the point-of-sale.

Products on show include fresh, unprocessed fruit and vegetables, dried fruit, nuts, herbs and spices, organic products and self-service flowers and potted plants. Suppliers of products and services for packaging, storage, transport, warehousing and product presentation as well as the service market with IT solutions also exhibit their offerings.

Statistical Details (of 2010 Edition):

Overall Area (m2): 97,000 Total No. of Exhibitors: 2.314

Foreign Exhibitors: 2,070 (90% of total exhibitors)

No. of Countries Represented: 71 Total No. of Trade Visitors: 54,172

Foreign Trade Visitors: 42,633 (80% of total visitors)

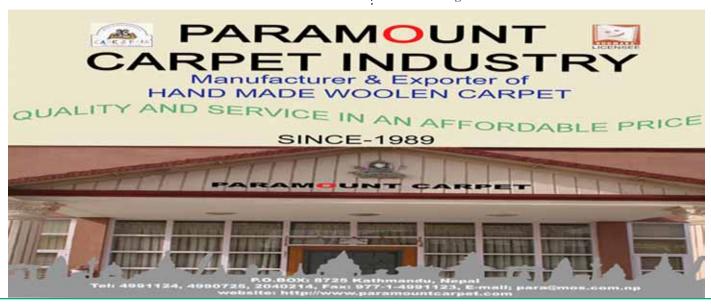
From ... Countries: 125
Frequency: annual

Date of Next Event: 9 – 11 February 2011 in Berlin

Because of the overall success of FRUIT LO-GISTICA since its first edition in 1993 and considering the high potential of the Asian markets, which are one most dynamic and rapidly expanding markets in the world, MESSE BERLIN decided to bring its expertise and the trade fair concept to Asia and established the ASIA FRUIT LOGISTICA in 2007.

ASIA FRUIT LOGISTICA has become in this short time of existence Asia's leading trade show for the international fresh fruit and vegetable business. In 2009, the third edition attracted more than 3,400 top decision-makers from 52 countries to Hong Kong. 224 Exhibitors from 31 countries presented a fascinating overview of the market and an unmissable opportunity to make important business contacts. ASIA FRUIT LOGISTICA is the most efficient platform in Asia for gaining an overview of the market, scouting for new products and varieties, and establishing new business contacts in this sector.

ASIA FRUIT LOGISTICA takes place together with the Asiafruit Congress – Asia's top international conference event. Please visit for further information: www.fruitlogistica.de





Trade Fair Calendar 2010

SEPTEMBER	
03.09. – 08.09. Berlin	IFA 2010
05.03. 00.03. 20.00.	World of Consumer Electronics
08.09. – 10.09. Hong Kong	Asia Fruit Logistica
	International Trade Fair for Fruit and Vegetable Marketing
12.09. – 15.09. Düsseldorf	HOGATEC
	The No. 1 in Technology and Design International Trade Fair Hotels, Gastronomy, Cater-
	ing
12.09. – 15.09. Düsseldorf	INTERMEAT
	International Trade Fair for Meat and Sausage
	INTERCOOL
	International Trade Fair for Frozen Food, Ice Cream, Technology
	INTERMOPRO
12.00 17.00 15 11	International Trade Fair for Dairy Products
13.09. – 17.09. Munich	IFAT 2010 World Leading Trade Fair for Water, Sewage, Refuse and Raw Materials Management
14.00 10.00 Frank	
14.09 19.09. Frankfurt	Automechanika World's Leading Trade Fair for the Automotive Industry
21.09. – 24.09. Berlin	INNOTRANS 2010
21.09. – 24.09. Bellill	International Trade Fair for Transport Technology, Innovative Components - Vehicles -
	Systems
23.09. – 30.09. Hanover	IAA NUTZFAHRZEUGE
25.07. 50.07. Hallovel	International Trade Fair for Motor Vehicles, Equipment and Systems for the Transport of
	Goods and Passengers
28.09. – 01.10. Düsseldorf	GLASSTEC
	International Trade Fair for Glass Production, Processing and Products
	Solarpeq
	International Trade Fair for Solar Production Equipment
OCTOBER	
04.10. – 06.10. Munich	EXPO REAL
	International Trade Fair for Commercial Property and Investment
26.10. – 30.10. Hanover	EuroBLECH
	International Sheet Metal Working Technology Exhibition
27.10. – 03.11. Düsseldorf	K 2010
	International Trade Fair No. 1 for Plastics and Rubber
NOVEMBER	
10.11. – 14.11. Berlin	IMPORT SHOP Berlin
	International Handicraft Exhibition
16.11. – 19.11 Hanover	EuroTier
	International DLG Exhibition for Lifestock and Poultry Production and Management
17.11. – 19.11. Düsseldorf	MEDICA
	World Forum for Medicine International Trade Fair with Congress
	COMPAMED
	International Trade Fair High tech solutions for medical technology
24.11. – 28.11. Munich	HEIM & HANDWERK
	International Trade Fair for Furnishing and Handicraft
	1

See also the trade fair calendar 2010 on the NGCCI-homepage (www.ngcci.org) or contact NGCCI for further information.





Usefulinformation

- Annex-Export Sector: Major Players in Germany and Useful Sources
- Web-Links Presentation
- Member Questions

Annexe-Export Sector: Major Players in Germany and Useful Sources

ermany is home to many large stationery manufacturers. Herlitz (www.herlitz.de), Hamelin Paperbrands (www.hamelin-paperbrands.com) and the Mayer-Kuvert Group (www.mayer-kuvert.de) are the leading German manufacturers in the paper-based items product segment.

The filing product market in Germany has three main players with strong positions: Esselte Leitz GmbH & Co (www. esselte.com), Herlitz PBS AG (www.herlitz.de) and Elba Buerosysteme GmbH & Co (www.elba.de). Other companies are: Durable (www.durable.de), Falken Office Products GmbH (www.herlitz.de/produkte/buero/falken.html), Landré GMBH (www.landre.de), Pagna/Aulfes (www.pagna.de), Plastoreg Smidt KG (www.plastoreg.de) and Veloflex (www.veloflex.de).

Office & desk accessories are also extensively produced in Germany. Leading German manufacturers are Hansawerke (www.hansawerke.de), Helit (www.helit.de), Henkel (www.henkel.de), Läufer (www.laeufer.de) and Leitz (www.leitz.com).

Wholesalers:

There are more than 100 stationery wholesalers in Germany. The major German stationery wholesalers are: Spicers (www.spicers.de), Egropa (www.egropa.de), PBS Deutschland (www.pbsdeutschland.de), InterES (www.inter-es.de).

Contract stationers:

Important contract stationers in Germany are: Staples (www. staplesadvantage.de), Kaut Bullinger (www.kaut-bullinger.de), Ahrend (www.ahrend.com), Lyreco (www.lyreco.com) and Office Depot (www.officedepot.de).

Buying groups:

The German stationery market is characterised by the particular strength of buying groups. Important buying groups in Germany are Egropa (www.egropa.de), InterES (www.inter-es.de), Soennecken eG (www.soennecken.de), Bueroring eG (www.bueroring.de), EWEPA GmbH (www.ewepa.de) Office Star Deutschland (www.officestar.de) and Interaction (www.interaction-connect.com).

Retailers

Some of the retailers of multiples retail channels are: Staples (www.staples.com), Printus (www.printus.de), Office Depot (www.officedepot.de), Officexl.de GmbH (www.officexl.de), Otto GmbH & Co (www.otto-office.com), Metro AG (http://www.metro24.de/pages/DE/HomePage), Duo Schreib & Spiel (www.duo-shop.de), Edeka/AVA Gruppe (www.edeka.de), Kaufland Stiftung & Co KG (www.kaufland.de), Rewe-Gruppe (www.rewe.de) and Soennecken eG (www.soennecken.de).

Useful Sources:

Media

- I Office & Paper Magazine www.officeandpaper.de
- BOSS Magazin für die PBS/BBO-Branche -www.bitverlag.de
- OPI Office product magazine www.opi.net
- Channel info magazine www.channelinfo.net
- I International Stationery Guide www.is-guide.com

Trade fairs

- AUMA Association of the German Trade Fair Industry www.auma.de
- Paperworld in Frankfurt http://paperworld.messefrankfurt.com
- Trendset/Mustermarkt/Bijoutex in Munich www.trendset.de
- Early bird in Hamburg -www.earlybird-messe.de
- Innowa in Dortmund -www.innowa-dortmund.de
- Orgatec in Cologne www.orgatec.de

Associations

- BBW- Bundesverband Bürowirtschaft www.bbw-online.de
- AVG Arbeitsgemeinschaft der Hersteller and Verleger von Glückwunschkarten www.avgcard.de
- GVS Großhandelsverband Schreib-, Papier waren und Bürobedarf www.gvsonline.de
- I ISZ- Industrieverband Schreiben, Zeichnen, Kreatives Gestalten www.ewima-isz.de
- WPV Wirtschaftsverbände Papierverarbeitung www.wpv-ev.de
- BSO Verband Büro-, Sitz- und Objektmöbel www.buero-forum.de
- EWIMA European Writing Instruments Manu facturers Association www.ewima.org
- FEPE European Envelope Manufacturers As sociation www.fepe.org
- SHOPA School, Home, & Office Products As sociation www.shopa.org



- FEMB European Federation of Office Furni ture - www.femb.org
- I IOPFDA Independent Office Products and Fur niture Dealers Association www.iopfda.org
- Office world Dutch trade association for statio nery items www.officeworld.nl
- BOSS

 British office supplies and service fed eration www.bossfederation.com

Others

- MPA International (Research agency) www.mpainternational.com
- Iplusc (Research agency) www.iplusc.com
- Euromonitor (Research agency) www.euromonitor.com
- Datamonitor (Research agency) www.datamonitor.com

Web-Links Presentation

E-Trade-Center:

-Trade-Center enables both German and foreign companies to publicize their products and services on Internet and, conversely, to enquire for the products and services they need. It provides them with an opportunity of presenting their diverse requirements for cooperation, such as searching for investors, technical know-how, etc. Companies can enter their business enquiries in e-trade-center themselves on the following homepage: www.e-trade-center.com

EU Export Helpdesk for Developing Countrie

The Export Helpdesk is an online service, provided by the European Commission, to facilitate market access for developing countries to the European Union. This free and user-friendly service provides relevant information required by developing country exporters interested in supplying the EU market: http://exporthelp.europa.eu/index en.html .

International Trade Centre (ITC)

The International Trade Centre (ITC) is the joint agency of the World Trade Organization and the United Nations. Their overarching goal is to help developing countries to achieve sustainable development through exports; activating, supporting and delivering projects with an emphasis on competitiveness. ITC provides various, very useful information on their homepage: www.intracen.org/welcome.htm.

Member Questions

GCCI wants to improve the level and availability of information for NGCCI-Members and starts with this Newsletter to publish questions from NGCCI-Members as the topics can be of interest for all our members. We kindly request our members to ask the NGCCI-Team about export and business topics. Send your question to cimexpert@ngcci. org.

Custom information

Where do I find information about the customs duty for my product which I want to export to Europe / Germany?

Information about Taxation and Custom in Europe you find on the homepage of the European Commission – Department Taxation and Customs Union (http://ec.europa.eu/taxation_customs/index_en.htm). For example:

General information on tariffs and quotas can be found

at: http://ec.europa.eu/taxation_customs/customs/customs duties/tariff aspects/quotas/.

Information on customs tariff:

http://ec.europa.eu/taxation customs/dds/tarhome en.htm

Information about the different VAT rates in EU countries:

http://ec.europa.eu/taxation_customs/taxation/vat/how_vat_works/rates/index_en.htm

European Tax Database at:

http://ec.europa.eu/taxation_customs/taxinv/welcome.do;jsessionid=MR97hwdF29BDpShL6pN4SGtcH2vrvmnjRdhl21RPsbNfF19pXGkd!286709672.



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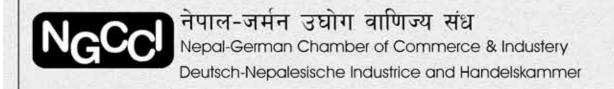
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to the Friendly People of the
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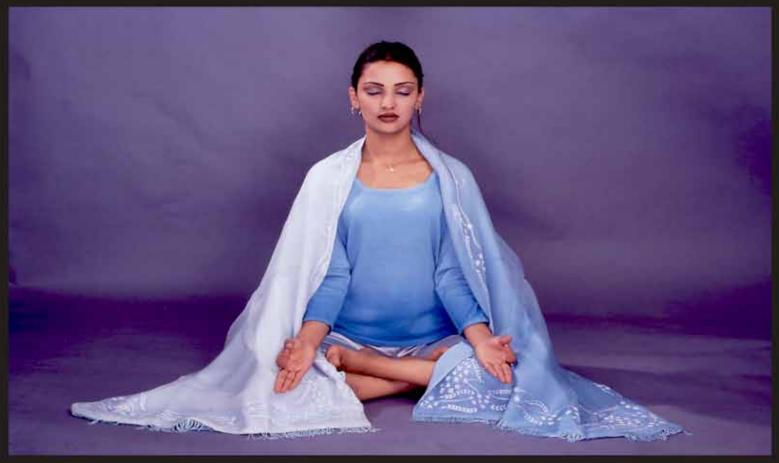
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