EU MARKET SURVEY 2003

STATIONERY ITEMS, OFFICE AND SCHOOL SUPPLIES

VOLUME II

CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

EU MARKET SURVEY 2003

STATIONERY ITEMS, OFFICE AND SCHOOL SUPPLIES

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REPORT SUMMARY

This survey profiles the market for stationery items, office and school supplies in the Netherlands and other selected markets in the European Union (EU). The objective of this survey is to provide manufacturers and exporters in developing countries with factual information on the distinctive features of these markets.

The emphasis of the survey lies on those products that are of importance to developing country suppliers. In this survey the market for stationery is divided into five product groups: paper products; writing and drawing instruments; other desk and school supplies; artists' materials; and cards and calendars.

The survey includes contact details of importers, trade associations, and other relevant organisations. You'll also find statistical market information on consumption, production and trade, as well as information on trade structures.

As an exporter you'll need this information to formulate your own market and product strategies. In order to assist you in that task, the CBI has developed a matching 'EU Strategic Marketing Guide for stationery items, office and school supplies'. It is a practical guide for exporters or those aspiring to export products within this sector to the EU. The guide aims at helping exporters formulate their own market and product strategies by providing practical information, a methodology of analysis and a number of fill-out frameworks.

Doing your own market research
This EU Market Survey and the accompanying EU Strategic Marketing Guide can best be used as a basis for further market research: after you have read this survey and filled out the frameworks in the strategic marketing guide it is important to further research your target markets, sales channels and potential customers.

Market research should be done in two stages. The first step is to search for relevant secondary data (data that have been compiled and published at an earlier stage). The second step concerns primary data (information that you collect yourself). This EU Market Survey is an example of secondary data. It is necessary to search for primary data if the secondary data do not provide you with sufficient information. For instance, you'll need to find primary data about the specific requirements of your target group / consumers and about acceptance of your specific product. The many sources containing this kind of information include (statistical) databanks, trade magazines, newspapers, market reports and annual branch organisation reports. But there are other important sources, too: local shops, competitors' product samples and catalogues, or conversations with suppliers, specialists, colleagues and even competitors. After you have collected your information, you must analyse it. In order to assess the suitability of a particular market, sales channel or customer, you can use a classification or score system.
For more detailed information on the do's and don'ts of market research, we refer to the 'CBI Export Planner'.

Consumption: trends and figures
The trade in stationery items and office and school supplies has an international character. Globalisation is playing an increasingly important role, promoting uniformity within many product groups and contributing to more efficient production. But the globalisation trend is also bearing out that the many cultural differences between consumers within different European countries will continue to exist.
Consequently, the market for stationery items, office and school supplies in European countries will continue to be an enormous variety.

Consumers within the EU spent a total of about € 43 billion on stationery items, office and school supplies in 2000. Germany was Europe's largest market in terms of value (€ 10,608 million). France was the second largest (with a total market volume of € 7,562 million), followed by Italy (€ 6,746 million), the United Kingdom (€ 6,392 million) and Spain (€ 3,253 million). The market volume of the Netherlands amounted to about € 2,013 million.

General import figures
The total imports of stationery items, office and school supplies by EU member countries amounted to about € 7,112 million in 2001, a 15% increase in terms of value compared to 1999 (imports rose in 2000, but dropped slightly 2001). In terms of volume (tonnes), EU imports increased by 10% in the same period. In Italy, the Netherlands, France, Germany and especially Greece, imports measured in weight increased considerably. The United Kingdom, on the contrary, which imported the most merchandise, has shown a deterioration of imports in tonnes.

Germany was the leading importer in 2001, accounting for more than 20% of the total imports by EU member countries, followed by the UK (18%), France (14%), the Netherlands and Belgium (both 8%), and Italy (7%).

The share of imports from non-EU countries is on the rise. Whereas in 1999 some 32% of total imports came from non-EU countries, their share was up to 35% in 2001.

Imports by product groups
The total amount of imports of paper products by EU member countries slightly decreased in recent years. Paper products account for 52% of total EU imports within this sector. The product group handmade paper and continuous forms showed the most remarkable decline. Various other product groups, notably office paper, have shown convincing growth. Envelopes and exercise books only rose slightly.

The total value of the imports of the product group writing and drawing instruments, which on average represents some 15% of total EU imports for this sector, dropped. For a number of products within this group the drop was severe: drawing pens, fountain pens, refills for ball-point pens. Imports of other products, however, notably ball-point pens and propelling pencils, increased by 11% between 1999 and 2001. Developing countries supplied an 89% share of those imports.

The product group other desk and school supplies, which accounts for 19% of total EU imports, also showed declining figures. The products gummed paper and tape, fittings for binders (ring and other mechanisms), ink-pads and stamps underwent the worst drop. The imports of office and school supplies, notably staples and paperclips, showed a remarkable increase: extra-EU imports of staples increased by 30% and extra-EU imports of paperclips increased by 81%.

Artists' materials account for 8% of total EU imports in this sector. Within this product group the artists' colours (assortment) increased by 36%. The Imports of brushes grew by 29% and the Imports of crayons decreased by 4%.

EU member countries obviously imported slightly more cards and calendars in recent years. The rise in the Imports of cards more than compensated for the decreased imports of calendars. Cards and calendars as a product group account for 5% of total EU imports. The intra-EU import decreased by 6% and the extra-EU import increased by 26%.

The share of developing countries
While the total imported value of stationery items, office and school supplies by EU member countries increased by 15% between 1999 and 2001, the imported value originating in developing countries increased by no less than 59%. This remarkable increase of imports from developing countries is a clear tribute to producers from developing countries and their proven ability to anticipate market demands within EU countries. Their products evidently meet European quality standards and their design and styling satisfy the tastes of European consumers. These factors, combined with a rational production, have resulted in competitive price-fixing, which in turn has contributed to the remarkable results mentioned. The above figures prove that producers in developing countries can successfully develop their export to EU countries.

Exports
The EU member countries together exported about € 7.5 billion worth of stationery items, office and school supplies in 2001, some 10% less than they did in 1999. Germany was the most important exporter (24%), followed by France (14%), the UK (11%) and Italy (10%). Belgium and the Netherlands do not have a sizeable manufacturing industry. Their export position can largely be ascribed to their roles as transit countries.

Trade structure
The market for stationery items, office and school supplies has developed into an internationally transparent market. The completion of the internal EU market has not left the distribution sector untouched. The introduction of the euro-zone will strengthen the transparency of the market and its competitive field. In other words: keen competition has pushed down margins.
At the same time the distribution chain is being influenced by internationalisation. EU companies are looking for foreign partners or strengthening their market position by take-overs, mergers and co-operation. New distribution channels, aggressive mail-order companies, contract stationers and stationery hypermarkets have increased the competition for individual wholesalers and retailers.
However, there are many nationally orientated importers and agents in every EU country. These present a particularly interesting market for exporters, especially exporters of private label products.

Opportunities for exporters in developing countries
Developing country producers looking for customers in the EU should realize that the European consumer is quality-conscious and attaches great value to styling and design. Many consumers are spending more and more on products within this sector, especially on articles intended for personal use. The interest of professional users hinges more acutely on a competitive price/quality ratio. Secondary, but increasingly normative conditions for European buyers include the use of environment-friendly raw materials and that internationally qualified production methods (ISO-certification and CE-marking).
Packaging is another factor exporters must bear in mind. Many buyers want their own characteristics imprinted on the packaging. The number of items packaged and shipped together also has to answer to the buyer's demands. Quite often products have to be delivered as a blister (the way they appear in the shop), with or without with a BAR-code or CE-mark. Producers able to meet these demands have a competitive edge on their rivals in exporting to Europe.

1 PRODUCT CHARACTERISTICS

1.1 Product groups

This survey focuses on the market for stationery items, office and school supplies. It specifically does not include office machines, office computers and office furniture as these product groups are not very interesting in connection with exports from developing countries.

Stationery items, office and school supplies cover a wide range of products used for administrative work in the office and at school, for private use at home as well as for creative purposes. In order to provide insight into the diverse applications of stationery items, office and school supplies, we have divided the sector into five product groups in this survey:

- Paper products;
- Writing and drawing instruments;
- Other desk and school supplies;
- Artists' materials;
- Cards and calendars.

All of these products are bought by both professional and private users, with the exception of artists' materials, which are mainly bought and used by private customers (although a professional painter could be considered a professional user). It should be noted, though, that some artists' materials have been placed in the product group other desk and school supplies. The same applies to the product groups paper products and writing and drawing instruments, as these articles are bought both by private and professional users.
The difference between products intended for private and professional use is often shown in the way they're packaged (number of pieces per sale-unit) and in their design (colour, fashion and styling): a gel-liner intended for an office worker will obviously not be designed and packaged in the same way as one intended for a teenager at school, though the two products themselves are identical.
Articles in the product groups other desk and school supplies and cards and calendars are bought by both professional and private users. A negligible part of these product can be included in the school supplies because of their design.

Paper products
Paper products can be divided into machine-made and handmade. Machine-made paper products include notebooks, writing pads, photo albums and paper bags. Exporters of these products have to be able to supply relatively high-volume orders. Handmade paper offers possibilities for the development of various articles such as address books, diaries, bags, maps and wrapping material. The wide variety of basic materials with which handmade paper can be produced in combination with the many colours and designs that can be applied offer a wide scale of possibilities for product applications aimed at the consumer market.

Writing and drawing instruments
The product group writing and drawing instruments is characterized by a growing number of innovative products. The most well-known items in this product group undoubtedly still are the wooden pencil and the colour pencil. Other famous members are ball-points, felt- and fibre-tip pens, markers and, increasingly, gel-liners. The easy writing provided by the innovative gel-inks makes them strong competitors of the more traditional fountain pen. However, in spite of many innovations, the fountain pen with its flat writing nib the characteristic handwriting associated with it, is still in great demand.

Other desk and school supplies
The product group Other desk and school supplies includes many accessories, mostly made of plastic, for office use: letter- and pen trays, copy holders, filing tray units, CD racks, magazine racks, waste bins, business card boxes, paperclip dispensers, pen bases, multi-pen holders, tape dispensers and so on. Increasingly, this product group and the computer supplies product group overlap each other.

Artists' materials
Traditionally, the product group artists' materials consists mainly of charcoal, graphite-pins, oil- and watercolour paints, as well as painting accessories such as frames, pencils and brushes of many types and qualities. More modern items are on the rise, however, such as materials for painting on glass and metal and, increasingly, acrylic paints, which are gaining popularity because of their environment-friendliness.

Cards and calendars
In spite of the Internet revolution, greeting cards are still immensely popular in the EU. The fact that publishers have created many new markets – expanding on the concept of Christmas, New Year's and Valentine cards to develop and publish cards for births, birthdays, graduations, changes of address, divorces, marriages and many other occasions – has contributed to this success. The same applies for calendars. From a basic tool for keeping track of days, weeks, months and years, the calendar has become an object of beauty and a carrier of vast varieties of, often thematic, illustrations and artwork.

1.2 Customs/Product classification

The classification system used for both customs and statistical purposes in the Netherlands (and in all other EU member countries) is the Harmonized Commodity Description and Coding System (HS). In other parts of this survey, for example in chapter 3, a different form of statistical classification has been used. For this reason the consumption and production data in this survey are not compatible with the import and export data.
The relevant HS code groups covered by this survey are:

Table 1.1 Paper products

HS Code	Product group
4802.10	Handmade paper
4817.10	Envelopes
4817.20	Post sheets and correspondence cards
4817.30	Correspondence sets (boxes or sets)
4820.10	Registers, account blocks, order blocks and receipt blocks
4820.10	Writing pads, notepads, notebooks, diaries with calendars and memo pads
4820.20	Exercise books
4820.30	Files, folders and binders
4820.40	Forms (in sets)
4821.10	Labels
4821.90	Labels, not printed
4823.51	Continuous forms, printed and perforated
4823.59	Paper and cardboard for office machines

Table 1.2 Writing and drawing instruments

HS Code	Product group
9608.10	Ball-points
9608.20	Markers and highlighters
9608.31	Drawing pens (Indian ink)
9608.39	Fountain pens 9608.40 Propelling pencils
9608.50	Assortment of writing instruments
9608.60	Refills for ball-point pens
9608.91	Pen nibs and nib points
9608.99	Pen-holders, pencil-holders, refills for felt- and fibre-tipped pens, and parts of ball-points, markers and fountain pens

Table 1.3 Other desk and school supplies

HS Code	Product group
3926.10	Office and school supplies (synthetic)
4016.92	Erasers of vulcanised rubber
4823.11	Gummed paper, tape, self-adhesive
214.10	Letter openers, paper knives, erasing knives and pencil sharpeners (metal basic)
8304.00	Filing cabinets, card-index cabinets, paper trays and pen trays
8305.10	Fittings for loose-leaf binders or files (metal) 8305.20 Staples
8305.90	Paper clips
9611.00	Stamps for dating, sealing and numbering
9612.20	Ink-pads

Table 1.4 Artists' materials

HS Code	Product group
3213.10	Artists' colours in tubes and bottles (assortment)
3213.90	Artists' colours in tubes and bottles
4903.00	Picture, drawing and colouring books for children
9603.30	Brushes
9609.10	Pencils
9609.20	Pencil lead, black or coloured
9609.90	Pastels 9609.90 Crayons

Table 1.5 Cards and calendars

HS Code	Product group
4909.00	Postcards and greeting cards
4910.00	Calendars

2 INTRODUCTION TO THE EU MARKET

The European Union (EU) is the current name for the former European Community. Since January 1, 1995, the EU has consisted of 15 member states. In 2004 ten new countries will join the union, while negotiations are in progress with a number of other candidate member states.

In 2002, the EU population totalled 379.4 million; the average Gross Domestic Product (GDP) per capita amounted to approximately € 21,023.

Within Western Europe – which comprises 15 EU member countries, Iceland, Liechtenstein, Norway and Switzerland – more than 20 million enterprises are active. Most of these are small and medium-sized enterprises (SMEs). In 2000, the average turnover per enterprise amounted to € 600,000 for SMEs and € 255 million for large enterprises.

The one aspect of the European unification process that most affects trade is the harmonisation of rules throughout EU countries. Internal borders have been all but removed, allowing free movement of capital, goods, services and people. Goods produced or imported into one member state can be moved to and between other member states without restrictions. A precondition for this free movement is uniformity in the rules and regulations for production and imports. Although the EU is already a fact, this harmonisation process is far from completed. For more information about harmonisation, please consult AccessGuide, the CBI's database on non-tariff trade barriers (www.cbi.nl/accessguide).

The Euro

On January 1, 1999, the euro became the legal currency within twelve of the fifteen EU member states: Austria, Belgium, Finland, France, Germany, Greece, Italy, Ireland, Luxembourg, the Netherlands, Spain and Portugal. In 2002 euro coins and banknotes replaced the national currencies in these countries. Denmark, the UK and Sweden have decided not to participate in the monetary union.

The most recent Eurostat trade statistics quoted in this survey are from the year 1999. Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on January 1, 1993. Until that date, trade was registered by means of compulsory customs procedures at border crossings. However, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat cannot now depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but is typically around € 100,000. As a consequence, although figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated.
It should be noted, furthermore, that the information used in this market survey has been obtained from a variety of different sources, so that interpretations and comparisons, for instance of different EU countries, should only be made with the utmost caution.
National statistics concerning production and

Overview 15 EU countries, 2002

Population	**379.4 million**
Area	**31,443,000 km²**
Density	**83 people per km²**
Languages	**15 (excl. dialects)**
GDP/capita	**€ 21,023**
Currencies	**€, UK£, DKr., SKr.**
Exchange	**€ 1 = US$ 0.99**

Population and GDP of selected EU countries, 2002

Countries/category	Population	Age 15-64	GDP (€ billion)
Germany	**83.3 million**	**68%**	**2,206**
France	**59.8 million**	**65%**	**1,556**
UK	**59.8 million**	**66%**	**1,485**
Italy	**57.7 million**	**67%**	**1,416**
Spain	**40.1 million**	**68%**	**836**
The Netherlands	**16.0 million**	**68%**	**417**

Source: The World Factbook 2002

Exchange rates of EU currencies in US$

Country	Currency	1999	2000	2001	2002	March ‘03
European Union	€	1.06	0.92	0.91	0.93	1.10
United Kingdom	GB£	1.62	1.51	1.46	1.49	1.31
Denmark	Dkr	0.13	0.12	0.12	0.12	0.12
Sweden	Skr	0.12	0.11	0.09	0.11	0.10

Source: CBS Statline

consumption in European countries, moreover, are scarcely available. The reason for this may be that the stationery items, office and school supplies sector only accounts for an average of 0,5% of the gross national product in those countries. The data for Belgium, France, Germany, the UK and the Netherlands proved the most adequate and have therefore been used for this survey.

3 CONSUMPTION

This chapter gives information on the consumption of stationery items, office and school supplies in the EU. Despite the countless factories supplying this sector and the international nature of the trade, national consumption statistics for European countries are scarce. The quantification of the demand is, therefore, based on aggregated figures. Country-specific figures for separate product groups are also scarce. Those found are briefly discussed. As the information used in this chapter is obtained from a variety of different sources, the reader is advised to be cautious in comparing them.

3.1 Market size

The demand in EU countries for stationery items, office and school supplies – a sector that includes a wide variety of products – is all about high quality and competitive price-fixing. The trade has an international character. The role of globalisation is becoming increasingly important. European consumers annually spend a total of around US$ 40 billion (€ 43 billion) on this sector (see table 3.1) – 0.5% of the EU's average GDP.

Table 3.1 Consumption of stationery items, office and school supplies by EU member countries in 2000

Country	US$ millions	€ millions
Germany	9,750	10,608
France	6,950	7,562
Italy	6,200	6,746
United Kingdom	5,875	6,392
Spain	2,990	3,253
Netherlands	1,850	2,013
Sweden	1,295	1,409
Belgium	1,175	1,278
Austria	975	1,061
Denmark	860	936
Finland	785	854
Greece	495	539
Portugal	435	473
Ireland	420	457
Luxembourg	75	82
Total	**40,130**	**43,661**

The five most important countries in terms of the consumption of stationery items, office and school supplies are Germany (market share 25%), France (17%), Italy and the UK (both 16%) and Spain (8%).

The Netherlands

Private consumers in the Netherlands spent about € 1,085 million on paper products and € 227 million on greeting cards in 2000, a total of €1.3 billion (including VAT). Business consumers spent a total of about € 3.0 billion (including VAT) on office supplies (€ 2,382 million) and on computer supplies (€ 635 million).

The stationery and school market is more stable and less changeable than the office supplies market. Nevertheless, it is a competitive market.
The market for office and school supplies grew by about 5% in 2000 and about 2% in 2001. In general terms, business spending increased more than private spending. Experts predict that the 2002 figures for both segments will show no growth at all. For the next few years an increase of stationery sales is expected to occur within the product groups computer supplies, filing systems and office paper (non-printed paper used for copying, printing and faxing).
During the 1980s, the average annual increase in spending on office and school supplies totalled about 5%. In the 1990s it dropped to about 3%. The measure of increase depends largely on the economic climate.

Belgium

The overall consumption of office supplies, including paper, in Belgium amounted to about 1.5 billion US$ (including VAT) in year 2000, a 21% growth compared to 1998. The business-to-business segment took about 70% of the total market, raising its share by some 30%. By contrast, private consumers spent only 8.5% more on office supplies in 2000 than they did in 1998.

France

The French market for stationery, after many years of recession, has finally begun to show signs of recovery. It grew by 1,1% between 1999 and 2000, reaching a total value of US$ 3.9 billion. The wide-scale development of information technology for business use, which resulted in increased consumption of stationery and computer supplies, strongly influenced sales.
Accounts, organizers and files were the largest sector of the market for stationery items, office and school supplies, having grown by 17,5% to a value of nearly US$ 705 million. The correspondence and exercise books sector lost its position as the largest sector, ending at a total amount of US$ 620 million. This sector has been subject to increasing competition from products such as facsimiles, Minitels, CD-ROMs and, more recently, the Internet. As more and more sophisticated products are used in schools as well as small offices and homes (so-called SoHo's), this trend is likely to continue.
The greeting cards sector remains relatively underdeveloped in France, at least compared to other

countries in the West. The custom of sending greeting cards was never widespread in France and the few consumers who did send cards are increasingly reverting to the Internet as a means of correspondence. The office supplies sector, particularly computer supplies, has always been a rather small sector in France, but it has become extremely dynamic over the last few years, even expanding by 31.8%. It has benefited greatly from the increasing use of home computers and faxes.

Germany

In Germany, per capita expenditure on stationery products averaged about US$ 44 in 2000, an increase of 0.2% compared to 1999. As German schools do not provide stationery articles, school children are by far the biggest buyers of stationery items and school products in this country. However, in 2000, for the first time since 1995, the number of school children in Germany dropped below 10 million.
The total German market for stationery, office supplies and school items virtually stagnated in 2000, growing by a mere 0.6%. Total consumer spending amounted to around US$ 9,750 billion. Most of the business was realized by retail shops and department stores (US$ 5.3 billion). East German spending is lower than West German spending.

Despite the poor economic climate, the German market was still buoyant a few years ago. The rate of growth slowed in the past two years, however, due to the emergence of discounters (often established on cheap located city centres and content with low margins), mail-order firms and the rising prices of raw materials. The increasing penetration of personal computers has affected sales negavtively, in terms of both value and volume. Also, the sales of regular traders – in terms of value – have suffered under the growing importance of discounters and intense price competition.
Germany's strong trend towards recycled and environmentally friendly products, which began in the late 1980s, has continued. As a result, manufacturers have welcomed alternatives to traditional products and developed new non-wood-based materials.

Stationery items bought by private consumers, or so-called social stationery items, are an important market segment. Writing paper and writing implements, for instance, both reached sales worth US$ 1.2 billion, growing by more than 10% since 1996.
The greeting cards sector showed the most dynamic growth in Germany (12% between 1998 and 2000). The increasing use of recycled products and non-woven materials has continued to fuel the sector's growth, particularly the greeting cards segment. These products are more successful in Germany than in any other European country.
Ball-point pens continue to take up most of the German market, although sales of more innovative products such as fluorescent coloured ball-points or pencils made from recycled products are growing rapidly.

United Kingdom

The market for office supplies in the UK was worth € 8.6 billion in 2000. The turnover was realized by the sales of stationery, carved office paper, computer supplies, presentation and conference materials, and office furniture. The UK has about 59 million inhabitants and 55% are white-collar workers or are somehow related to that group. British companies spent an average of € 601 on each 'full office-based workforce employee' in 2000. The average for people working in the service industries, e.g. educational and health and other services, amounted to € 425.

Scandinavia

The population of Finland is not only small, but also uses relatively little stationery. Finnish consumers spent a total of around US$ 785 billion in 2000. In Sweden, consumers spent a total of around US$ 1,295 billion. The position of Sweden on the European market for paper products is similar to that of Finland. Unlike Finland, however, Sweden does have stationery manufacturers and distributors (Esselte, for instance). The figure for Denmark was US$ 860 billion.

3.2 Market segmentation

This paragraph will give you a closer look at the most important market segments, i.e.:
- Private consumers (social stationery and school supplies);
- Business consumers (office);
- Small offices and home offices (SoHo's).

Private and business consumers

A distinction can be made between products aimed at business users (so-called 'office' or commercial stationery) and privately used products (so-called social stationery). Business consumers include industries, business offices, schools and government offices. Private consumers make their purchases in retail shops and department stores.

All products are bought by both professional and private users, with the exception of artists' materials, which are mainly bought and used by private customers. The difference between products intended for private and professional use is often shown in the way they're packaged (number of pieces per sale-unit) and in their design (colour, fashion and styling): a gel-liner intended for an office worker will obviously not be designed and packaged in the same way as one intended for a teenager at school, though the two products themselves are identical.

The popularity of the SoHo
Working from home is a way of life for a growing number of Europeans. The office supplies market for small offices and home offices (SoHo's) is growing rapidly. However, consumers within this segment are hard to reach and tend to be very price-conscious.

3.3 Consumer trends and patterns

The turnover of stationery is partly seasonal; retailer sales reach a maximum at the beginning of the school period (August) and before the gift period (December). Increased attention for design and styling, 'green' products and private labels are among the trends currently influencing consumer behaviour.

3.3.1. Consumption patterns

Seasonal trends
Seasons play a major role in the buying patterns of consumers within this sector. This is particularly the case in the stationery and school supplies segments and less so in the office supplies market, where basic products like paperclips, staples and bond paper are purchased regularly throughout the year. Overall, a 'peak' season between September and December can be discerned for almost all products, especially in the private consumer-oriented market.

Back-to-school
One important seasonal event is the back-to-school period. The demand for school supplies like exercise books, school diaries, markers and writing instruments reaches its peak in August, after the summer school holiday. Very often, players in the distribution chain will start working towards back-to-school sales at least six months before school begins. Most orders are placed during the six months leading up to the beginning of the new school term.

Special events
The demand for diaries, calendars and Christmas and New Year's cards is, naturally, at it's highest towards the end of the year. An important season for general greeting cards is spring, which includes special days like Valentine's Day, Easter, Mother's Day and Father's Day. Congratulation cards for school graduates are popular at the end of the school term in June. Special greeting for birthdays, weddings, births and engagements are bought year-round.
Seasonal cards (for example Christmas and Valentine's cards) are usually put on display by retailers at least two months prior to the actual celebration. This means they finalise their orders with exporters at least five months before the date if they have not already been finalised during an annual buying trip.

3.3.2. Consumption trends

'Fashion' trends
The European consumer of stationery items, office and school supplies does not only demand high efficiency but also wants the products' colour combinations, materials and designs to answer to the trend of the moment. Many consumers will refuse to buy items that are not trendy. School children are a prime example of this trend-sensitivity (see next paragraph), as is a wide group of private and SoHo consumers.
On the commercial market trendiness is less important. Businesses are more interested in consistent quality, colour combinations and size. Prices are also an important factor.

Famous brands
School supplies can be broken down into two categories: 'anonymous' products sold without a special brand name and brand products embossed with a famous name of a film or television hero or producer (Mickey Mouse, Harry Potter, Paddington, LT-Sweety, Betty Boop, Tom & Jerry); a fashion house (Benetton, Mexx); a sports brand; (O'Neill) or a beverage brand (Coca Cola). Anonymous products are cheaper than products in the second category. School children are very sensitive to what is in fashion and what is not and usually prefer the more expensive, labelled products. In many cases these products are not solitary items but part of a concept line, in which a number of different items is presented under the same label.

Private labels
An important marketing tool for large retailers to profile themselves on the stationery market is the use of private labels (and packaging). Private labels and private brand names are successful on the market if the quality of the products is similar to the more famous brand names or if the retail price is lower than the normal retail price.

Location
Producers cannot afford to be located too far away from consumers if they wish to respond adequately to changing demands and trends. Locality is also important for many department stores and central buying groups that have their own brand names: these clients often want to be able to keep tabs on the production process and therefore choose companies located as close to them as possible.

The conceptual approach
More than ever before, stationery items, office and school supplies are part of a carefully thought-out range of products whose design reflects the latest developments in society and culture. In other words, distributing a concept line consisting of a number of different items in the same styling is a good move. The main question you have to answer in order to succeed

with this so-called conceptual approach is what are the needs of your potential consumers and how many of those can you meet within the scope of one concept line.

In the school supplies segment the conceptual approach is very important as large numbers of products can be lined up together: notebooks, exercise books, pens, files, erasers, desk attributes, a cell-phone or mobile phone, a school box and so on. If all these separate products are offered as one collection in terms of styling and presentation, their attraction value will be far higher and they may even set a trend.

The green trend

Another trend is the ‘green trend’, which arises from growing concern for the protection of the environment. There is an increasing demand for products made of environment-friendly materials and techniques. Environment-friendly products should be marked with a green label. Consumers prefer environment-friendly products, if the price is not too high in relation to traditional products.

Technological advances

The increasing use of computers at the office and at home is influencing the way many people live in the EU. The rise of computers does not mean less paper is being used. The ‘paperless office’ is not likely to appear in the coming years. Rather, other types of paper, for printing and copying, are in demand, such as high-quality paper and paper for special applications (for example for printing photos).

The use of office computers is still a growing market because new applications are still emerging. While their numbers and capacity increase, however, computers are becoming less expensive. With that, the market for computer supplies is booming, providing exporters in developing countries with interesting opportunities for entering this market.

Another technology-related trend is that people are busier than ever, so that time-saving, easy-to-use products like paper gift boxes are an increasingly attractive alternative to traditional gift-wrapping paper.

Hobby and free time

Hobbies that can be enjoyed at home without too much expense are expected to become more and more popular in the next few years. One example is making your own greeting cards.

4 PRODUCTION

This chapter provides information on the production of stationery items, office and school supplies in the EU. Although these products are manufactured in countless factories throughout many European countries and are traded internationally, country-specific statistics on European production are not available. Instead, we will look at the major producers in the selected countries.

The Netherlands

The Netherlands has a very small manufacturing industry for stationery items, office and school supplies. The country has only about 200 manufacturers (not counting a number of companies that produce stationery on the side). These mainly produce envelopes, paper products, files, folders, binders, pencils, tape, stamps, artists' colours and greeting cards. Generally speaking, they are strongly affected by the globalisation and internationalisation. A portion of the Dutch production of stationery, office supplies and school items, as well as a part of the imports, is exported to other (EU) countries (for statistics, see chapter 6).

The most well-known Dutch manufacturers are:

- Smead Company, formerly the Atlanta Group, which produces filing systems, computer supplies and paper products (turnover: US$ 40 million; exports: 70%; employees: 160, or 250, including subsidiary companies);
- Egidius Janssen, which produces mechanisms for lever arch files and files (turnover: US$ 30 million; exports: 80%; employees: 90);
- Haza Papier, a producer of paper products specialized in the production of crèpe de Chine (employees: 12; Exports: 70%);
- Henzo: photo albums (employees: 105);
- Jalema: filing systems and office supplies (employees: 150);
- Lutkie Cranenburg: paper products; and
- Ses: chalk, hobby and art materials.

The former Atlanta Group was taken over in 1998 by the American Smead Manufacturing Company (total turnover: US$ 400 million; employees: 3.000). The benefit of this take-over is that both companies can now enter the homemarket of the other company (market penetration).
The original Dutch manufacturers Bruynzeel (pencils) and Talens (artists' materials) have become subsidiaries of Sakura Color Products Corporation (Japan).

Greeting cards
The Dutch market for greeting cards is dominated by a small number of very strong players, who in recent years have taken over many smaller companies in the industry. One of the most well-known publishers is the USA-based Hallmark company.

Diaries
Diaries, both digital and paper, are supplied and manufactured by a large number of Dutch companies. Also, a large number of school and college or university diaries are marketed. The most famous Dutch manufacturer, Van Rijmenam, was recently taken over by a Belgian company (Brepols).

Belgium

Belgium also has a very small stationery items, office and school supplies industry. In the past Dymo was one of the country's most famous brand names for stationery items, however, it has been taken over by Esselte.
Brepols is a well know manufacturer of diaries and notebooks. The company also produces paper and printed stationery items for export to most European countries.
Other Belgian manufacturers are Alfac (transfers), Cadara (office supplies) and Lannoo (stationery items and school supplies).

France

The French market is dominated by Société Bic, which has a market share of some 22%. Bic and its subsidiary Conté continue to dominate the writing instrument sector with the Bic brand of biro's and the Conté pencils.
The stationery industry is very fragmented, with over 100 firms, many of which are family-run and specialise in niche sectors. Papeteries Clairefontaine is best known for its exercise books and is the market leader in school supplies. Waterman France produces traditional writing instruments of high quality, its main competitors being Sheaffer, Cross and Mont Blanc.

Germany

Baier & Schneider is the leader in the German stationery market, taking 17% of total sales in 2000, despite a poor performance in that year. Herlitz lost some ground in 2000. Its market share is estimated at 14% of the market. Originally a specialist in private writing paper, office supplies and writing equipment, Herlitz has extended its product range to the commercial retail sector.
Germany has a large stationery manufacturing industry. As for writing instruments, Germany has produced various brand names of international renown: Faber Castell, Diplomat, Lamy, Pelikan, Rotring (which has been taken over by Sanford, USA), Schneider, Staedtler and Stabilo. Well-known manufacturers of office and school supplies are Durable, Elba, Eberhard Faber,

Helit, Herma, Leitz, (taken over by Esselte), Novus and Zweckform.

United Kingdom

The industry for stationery items, office and school supplies in Britain is highly internationalised. Well-known names are Acco (office supplies), Lett's (diaries) and artists' materials manufacturers such as Berol (taken over by Sanford), Daler-Rowney Ltd., Derwent and Winsor & Newton.

Scandinavia

Finland and Sweden are world leaders in the production of paper and paper products. The profile of the European pulp, paper and board sector has changed considerably, becoming more concentrated and rationalised, since the two Nordic countries joined the EU.
Famous companies are United Paper Mills, EnzoGutzeit and Metsälliitto in Finland, and Stora, SCA, MoDo and AssiDomän in Sweden.

5 IMPORTS

The trade figures quoted in this section must be interpreted and used with extreme caution. Rather than providing hard statistical import data, they should be taken as trend indicators; their relative value is greater than their absolute value.

5.1 Total imports

The total EU imports of stationery items, office and school supplies amounted to about € 7.1 billion in 2001 (see table 5.1). Between 1999 and 2001, the value of imports increased by 15%. Total imports rose in 2000, but dropped a little in 2001.

Germany was the leading European importer in 2001, accounting for more than 20% of total EU imports followed by the UK (18%), France (14%), the Netherlands and Belgium (both 8%) and Italy (7%). Considering their relatively small populations, countries like the Netherlands and Belgium are large import countries. The reason for their high imports is twofold: they have only limited production facilities themselves and they have a strong position as an import gateway to other EU countries.

The imports can be divided into imports from other EU countries (intra-EU import) and from non-EU countries

Table 5.1 Imports of stationery items, office and school supplies by EU member countries between 1999 and 2001 in € (x 1000)

Product group	1999	2000	2001
Paper products	3,070,519	3,652,725	3,705,692
Writing/drawing instruments	1,082,357	1,293,723	1,197,435
Other desk and school supplies	1,258,292	1,440,917	1,337,122
Artists' materials	472,348	546,232	535,014
Cards and calendars	317,415	350,697	336,399
Total	**6,200,931**	**7,284,294**	**7,111,662**

Source: Eurostat (2002)

Table 5.2 Imports of stationery items, office and school supplies by EU member countries between 1999 and 2001 in € (x 1000)

Country	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Germany	666,399	479,704	1,146,103	875,118	588,142	1,463,260	847,681	578,866	1,426,547
UK	642,504	512,282	1,154,786	706,324	658,217	1,364,541	657,254	643,640	1,300,894
France	729,273	210,733	940,006	798,669	257,124	1,055,793	785,015	248,060	1,033,075
Netherlands	352,504	137,564	490,068	358,772	195,852	554,624	360,051	203,335	563,386
Belgium	400,924	124,712	525,636	464,653	132,232	596,885	407,357	147,247	554,604
Italy	292,845	153,073	445,918	351,836	177,243	529,079	330,096	182,117	512,213
Spain	247,384	104,335	351,719	347,052	123,344	470,396	318,965	122,066	441,031
Austria	208,926	66,467	275,393	210,647	106,582	317,229	211,010	148,941	359,951
Sweden	129,426	68,302	197,728	127,128	79,396	206,524	124,078	70,865	194,943
Ireland	130,809	28,205	159,014	152,527	46,153	198,680	151,747	30,859	182,606
Denmark	142,728	37,168	179,896	134,069	43,041	177,110	137,731	43,606	181,337
Portugal	98,439	12,427	110,866	98,073	13,920	111,993	103,961	12,124	116,085
Finland	69,120	16,765	85,885	72,799	20,683	93,482	75,901	23,046	98,947
Greece	78,609	20,729	99,338	78,443	25,449	103,892	68,993	26,610	95,603
Luxembourg	37,737	865	38,602	40,013	798	40,811	49,070	1,475	50,545
Total	**4,227,627**	**1,973,331**	**6,200,958**	**4,816,123**	**2,468,176**	**7,284,299**	**4,628,910**	**2,482,857**	**7,111,767**

Source: Eurostat (2002)

(extra-EU import). The share of imports from non-EU countries grew from 32% in 1999 to 35% in 2001.

5.2 Imports by product group

Paper products
Paper products account for 52% of total EU imports within this sector (see table 5.1). In the period under review, the Imports of paper products increased by 21%. Intra-EU imports of paper products increased by 16% and extra-EU imports by 34% (see Appendix 1). Various product groups within this sector showed convincing growth between 1999 and 2001. Office paper and forms grew most. Imports of handmade paper and continuous forms decreased. By contrast, the extra-EU share of handmade paper imports tripled (see Appendix 1).

Writing and drawing instruments
Writing and drawing instruments account for 17% of total EU imports within this sector (see table 5.1). Between 1999 and 2001, the Imports of writing and drawing instruments increased by 11%. Intra-EU imports were on the same level. Extra-EU imports increased by 23% (see Appendix 1).
The imports of ball-points rose by 18%. Extra-EU imports increased by 33%. Remarkably, the growth of the imports of fountain pens and drawing pens stagnated: intra-EU imports decreased by 20% while extra-EU imports increased by 15%. On the other hand, the Imports of propelling pencils and pen nibs increased by about 20%.

Table 5.3 Imports of paper products by EU member countries between 1999 and 2001, in € (x 1000)

Product group	1999	2000	2001
Handmade paper	46,956	39,280	24,578
Envelopes	322,074	375,299	392,504
Postsheets and cards	13,220	11,907	13,013
Correspondence sets	34,791	57,054	36,773
Writing pads	426,856	469,315	416,413
Exercise books	34,039	42,427	44,214
Files, folders and binders	158,444	179,315	165,231
Forms, in sets	41,343	48,868	59,161
Labels	506,223	558,474	572,641
Labels, not printed	146,477	153,064	151,251
Continuous forms	88,052	49,968	51,886
Office paper	1,252,044	1,667,754	1,778,027
Total	**3,070,519**	**3,652,725**	**3,705,692**

Source: Eurostat (2002)

Table 5.4 Imports of writing and drawing instruments by EU member countries between 1999 and 2001 in € (x 1000)

Product group	1999	2000	2001
Ball-points	507,163	638,807	596,782
Markers and highlighters	245,294	274,106	257,688
Drawing pens	9,632	9,814	6,087
Fountain pens	72,708	76,291	67,177
Propelling pencils	43,149	54,101	51,258
Assorted of instruments	70,098	86,526	79,146
Refills for ball-point pens	32,929	38,438	32,487
Pen nibs and nib points	24,670	32,891	29,983
Holders, refills and parts	76,714	82,749	76,827
Total	**1,082,357**	**1,293,723**	**1,197,435**

Source: Eurostat (2002)

Other desk and school supplies
Other desk and school supplies account for 19% of total EU imports (see table 5.1). Imports of this product group increased by 6% between 1999 and 2001. Intra-EU imports increased by 2% and extra-EU imports by 16% (see Appendix 1).
Extra-EU imports of staples and paperclips grew convincingly (by 30% and 81%, respectively). The imports of office and school supplies, filing cabinets and trays, usually made of plastics, increased by around 10%. Half of these were extra-EU imports.

Artists' materials
Artists' materials account for 8% of total EU imports in this sector (see table 5.1). The Imports of artists' materials increased by 13% in the period under review. Intra-EU imports increased by 5% and extra-EU imports increased by 22% (see Appendix 1).
The Imports of artists' colours (assorted) increased by 36% between 1999 and 2001, with intra-EU imports increasing by 38%. The Imports of brushes grew by 29%. Extra-EU imports of this product group increased by 40%. The Imports of crayons decreased by 4%. The decrease hit intra-EU imports hardest (-22%). Extra-EU imports of crayons, in fact, increased by 12%.

Cards and calendars
Cards and calendars are responsible for 5% of total EU imports within this sector (see table 5.1). The Imports of cards and calendars rose by 6% between 1999 and 2001, to the advantage of non-EU countries: intra-EU imports decreased by 6%, while extra-EU imports increased by no less than 26%.
The decline of intra-EU imports of cards (-4%) and calendars (-10%) is remarkable, especially compared to extra-EU imports, which increased by 35%. Extra-EU imports of calendars increased by 7%.

Table 5.5 Imports of other desk and school supplies by EU member countries between 1999 and 2001 in € (x 1000)

Product group	1999	2000	2001
Office and school supplies	660,275	784,737	728,932
Erasers	11,063	12,151	11,989
Gummed paper and tape	232,828	253,219	224,204
Sharpeners and paper knives	31,207	36,275	34,414
Filing cabinets and trays	48,557	51,283	51,412
Fittings for binders	104,149	114,019	98,384
Staples	55,391	65,102	65,009
Paper clips	20,560	26,570	29,913
Stamps	76,078	79,110	75,623
Ink-pads	18,184	18,451	17,242
Total	**1,258,292**	**1,440,917**	**1,337,122**

Source: Eurostat (2002)

Table 5.6 Imports of artists' materials by EU member countries between 1999 and 2001 in € (x 1000)

Product group	1999	2000	2001
Artists' colours (assorted)	38,069	44,297	51,679
Artists' colours	68,976	85,856	73,850
Colouring books	113,444	122,286	116,086
Brushes	82,919	101,218	107,197
Pencils	106,996	127,089	124,874
Pencil lead	10,299	12,964	11,953
Crayons	51,645	52,522	49,375
Total	**472,348**	**546,232**	**535,014**

Source: Eurostat (2002)

Table 5.7 Imports of cards and calendars by EU member countries between 1999 and 2001 in € (x 1000)

Product group	1999	2000	2001
Cards	220,021	252,824	242,448
Calendars	97,394	97,873	93,951
Total	**317,415**	**350,697**	**336,399**

Source: Eurostat (2002)

5.3 The role of developing countries

While the EU's total import value of stationery items, office and school supplies increased by 15% between 1999 and 2001, the imported value originating in developing countries increased by a promising 59% (see table 5.8). In 2001, EU imports from developing countries amounted to around 1.0 billion, accounting for 15% of the total import value (for more detailed statistics, see Appendix 1).

Paper products
Paper products are the leading product group supplied by developing countries, accounting for 36% of the total supply of stationery items, office and school supplies from developing countries and 10% of total EU paper product imports.
The total value of paper products imports by EU member countries increased by 21% between 1999 and 2001, while the import value originating in developing countries increased by 65%.
Among the top developing countries supplying the EU member countries with paper products in 2001 were India, the Philippines, Thailand, China, Indonesia, Slovenia, Malaysia, Turkey, Tunisia and Brazil.

Writing and drawing instruments
Writing and drawing instruments supplied by developing countries accounted for 18% of the total supply of stationery items, office and school supplies by developing countries to the EU. Around 15% of total EU imports of writing and drawing instruments comes from the developing world.
The total value of writing and drawing instruments imported by EU member countries increased by 11% between 1999 and 2001. The import value originating in developing countries increased by 89%.
Among the top developing countries supplying the EU with writing and drawing instruments in 2001 were India, China, South Korea, Malaysia, Thailand and Slovenia.

Other desk and school supplies
Other desk and school supplies supplied by developing countries accounted for 20% of the total supply of stationery items, office and school supplies by developing countries to the EU and around 15% of total EU imports of other desk and school supplies.
The total import value of other desk and school supplies by EU member countries increased by 6%, while the import value originating in developing countries increased by 35%.
Among the top developing countries supplying the EU member countries with writing and drawing instruments in 2001 were China, South Korea, Malaysia, Thailand, Slovenia, Mexico, Croatia, South Africa, Indonesia and the Philippines.

Table 5.8 Imports of stationery, office supplies and school items by EU member countries from developing countries between 1999 and 2001 in € (x 1000)

Product group	1999	2000	2001
Paper products	222.170	275.730	367.683
Writing/drawing instruments	94.653	154.513	178.423
Other desk and school supplies	152.719	215.435	206.740
Artists' materials	107.189	144.049	167.430
Cards and calendars	56.429	81.532	87.585
Total	**633.160**	**871.259**	**1.007.861**

Source: Eurostat (2002)

Artists' materials
Artists' materials supplied by developing countries accounted for 17% of the total supply to the EU of stationery items, office and school supplies by developing countries. Around 17% of the total EU imports of artists' materials comes from developing countries.
The total import value of artists' materials by EU member countries increased by 13% between 1999 and 2001, while the import value originating in developing countries increased by 56%.
Among the top developing countries supplying the EU member countries with writing and drawing instruments in 2001 were China, South Korea, Malaysia, Thailand, Indonesia and India.

Cards and calendars
Cards and calendars supplied by developing countries accounted for 9% of the total supply to the EU of stationery items, office and school supplies by developing countries. About 9% of the total imports of cards and calendars by EU member countries came from developing countries.
The total import value of cards and calendars in the EU increased by 6% between 1999 and 2001. The import value originating in developing countries increased by 55%. Among the top developing countries supplying the EU with cards and calendars in 2001 were China, Turkey, Malaysia and Thailand.

6 EXPORTS

The trade figures quoted in this section must be interpreted and used with extreme caution. Rather than providing hard statistical export data, they should be taken as trend indicators; their relative value is greater than their absolute value.
In 2001, the EU member countries together exported about € 7.5 billion worth of stationery items, office supplies and school items – a 10% increase compared to 1999 (see table 6.1). About 35% of total exports went outside the EU.

Germany is the most important European exporter (24%), followed by France (14%), the UK (11%), Italy (10%) and Austria (8%). Belgium and the Netherlands do not have any major manufacturers; their export position can largely be ascribed to their important transit functions for imported goods.
Below are detailed figures for each product group.

Paper products
Paper products accounts for half (50%) of total EU exports within this sector (see table 6.2). Between 1999 and 2001 paper product exports increased by 14%. Of those exports, 11% went to other EU countries and 23% went beyond the EU borders.

Writing and drawing instruments
Writing and drawing instruments account for 17% of total EU exports (see table 6.3). Between 1999 and 2001 exports of writing and drawing instruments increased by 2%, both within and beyond the EU.

Other desk and school supplies
Other desk and school supplies are responsible for 18% of total EU exports (see table 6.4). Exports of this product group increased by 8% in the period under review. Intra-EU exports increased by 3% and extra-EU exports by 18%.

Artists' materials
The Exports of artists' materials accounts for 7% of total EU exports (see table 6.5). The exports of artists' materials increased by 8% in the period under review. Exports within the EU increased by 3%, while exports to non-EU countries increased by 18%.

Cards and calendars
Cards and calendars contributed 5% to total EU exports in this sector (see table 6.6). The exports of cards and calendars increased by 16%. Exports within EU increased by 5% and exports outside the EU by 34%.

Table 6.1 Exports of stationery items, office and school supplies by EU member countries between 1999 and 2001 in € (x 1000)

Country	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Germany	971,787	690,973	1,662,760	1,132,128	795,766	1,927,894	1,038,975	805,253	1,844,228
France	643,918	307,465	951,383	705,556	317,119	1,022,675	698,841	317,192	1,016,033
UK	462,625	340,492	803,117	545,001	359,472	904,473	489,337	372,377	861,714
Italy	462,921	238,429	701,350	506,100	280,823	786,923	490,392	318,384	808,776
Austria	266,955	180,429	447,384	305,564	198,272	503,836	405,981	198,699	604,680
Belgium	465,989	64,835	530,824	516,336	76,481	592,817	499,148	72,738	571,886
Netherlands	402,090	63,732	465,822	449,216	74,331	523,547	414,425	87,609	502,034
Finland	288,704	97,590	386,294	370,297	120,343	490,640	257,431	99,161	356,592
Sweden	168,588	122,221	290,809	213,296	139,484	352,780	181,196	123,399	304,595
Spain	119,597	65,866	185,463	174,842	75,210	250,052	153,277	85,103	238,380
Denmark	111,158	66,275	177,433	108,416	79,389	187,805	124,042	76,735	200,777
Portugal	56,350	22,483	78,833	80,802	45,517	126,319	15,460	101,346	116,806
Ireland	102,896	31,165	134,061	86,357	22,959	109,316	77,805	15,597	93,402
Greece	9,177	7,903	17,080	10,461	11,968	22,429	5,373	14,042	19,415
Luxembourg	4,232	452	4,684	4,655	297	4,952	7,910	302	8,212
Total	**4,536,987**	**2,300,310**	**6,837,297**	**5,209,027**	**2,597,431**	**7,806,458**	**4,859,593**	**2,687,937**	**7,547,530**

Source: Eurostat (2002)

Table 6.2 Exports of paper products by EU member countries between 1999 and 2001 in € (x 1000)

Productgroup	1999 Intra-EU	1999 Extra-EU	1999 Total	2000 Intra-EU	2000 Extra-EU	2000 Total	2001 Intra-EU	2001 Extra-EU	2001 Total
Handmade paper	7,666	9,941	17,607	7,003	11,731	18,734	4,276	11,000	15,276
Envelopes	294,997	62,905	357,902	362,823	71,448	434,271	358,552	80,163	438,715
Postsheets and cards	4,180	3,988	8,168	4,770	5,489	10,259	3,611	6,865	10,476
Correspondence sets	14,274	14,208	28,482	19,642	17,655	37,297	15,098	16,618	31,716
Writing pads	264,763	116,025	380,788	269,322	128,980	398,302	268,177	138,518	406,695
Exercise books	20,210	18,057	38,267	22,365	21,008	43,373	21,961	24,247	46,208
Files, floders and binders	149,587	65,469	215,056	148,568	69,958	218,526	125,223	70,742	195,965
Forms, in sets	57,653	20,982	78,635	59,330	21,283	80,613	57,140	23,409	80,549
Labels	386,784	257,739	644,523	435,685	279,922	715,607	439,963	290,963	730,926
Labels, not printed	101,070	76,491	177,561	112,784	86,358	199,142	95,167	83,969	179,136
Continuous forms	59,044	25,255	84,299	44,411	34,252	78,663	40,032	27,696	7,728
Office paper	1,124,379	283,827	1,408,206	1,453,959	355,475	1,809,434	1,324,226	403,071	1,727,297
Total	**2,484,607**	**954,887**	**3,439,494**	**2,940,662**	**1,103,559**	**4,044,221**	**2,753,426**	**1,177,261**	**3,930,687**

Source: Eurostat (2002)

Table 6.3 Exports of writing and drawing instruments by EU member countries between 1999 and 2001 in € (x 1000)

Productgroup	1999 Intra-EU	1999 Extra-EU	1999 Total	2000 Intra-EU	2000 Extra-EU	2000 Total	2001 Intra-EU	2001 Extra-EU	2001 Total
Ball points	288,600	242,378	530,978	332,421	265,124	597,545	310,185	270,219	580,404
Markers and high- lighters	162,771	88,482	251,253	172,231	102,689	274,920	163,634	94,489	258,123
Drawing pens	9,756	12,173	21,929	7,983	12,696	20,679	3,864	10,828	14,692
Fountain pens	57,164	75,771	132,935	59,649	80,939	140,588	53,665	73,002	126,667
Propelling pens	23,254	25,546	48,800	22,811	21,267	44,078	24,328	21,184	45,512
Assorted of instruments	35,769	36,071	71,840	38,747	45,308	84,055	34,897	38,986	73,883
Refills for ball-points	19,752	43,550	63,302	21,190	31,246	52,436	17,666	30,449	48,115
Pen nibs and nib points	7,779	6,084	13,863	8,644	7,937	16,581	8,678	7,297	15,975
Holders, refills and parts	33,162	56,241	89,403	36,419	59,363	95,782	29,370	56,371	85,741
Total	**638,007**	**586,296**	**1,224,303**	**700,095**	**626,569**	**1,326,664**	**646,287**	**602,825**	**1,249,112**

Source: Eurostat (2002)

Table 6.4 Exports of other desk and school supplies by EU member countries between 1999 and 2001 in € (x 1000)

Productgroup	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Office and school supplies	458,038	206,787	664,825	498,560	235,822	734,382	472,911	228,367	701,278
Erasers	4,632	4,324	8,956	4,301	4,608	8,909	4,507	5,687	10,194
Gummed paper and tape	211,332	69,460	280,792	230,043	88,104	318,147	218,694	106,511	325,205
Sharpeners and paper knives	13,756	19,605	33,361	14,715	27,018	41,733	12,088	23,642	35,730
Filing cabinets and trays	22,539	17,324	39,863	22,633	21,324	43,957	18,583	21,372	39,955
Fittings for binders	61,336	28,919	90,255	58,345	27,822	86,167	54,806	27,653	82,459
Staples	54,028	44,769	98,797	66,178	49,116	115,294	57,131	47,754	104,885
Paper clips	15,072	7,847	22,919	23,715	8,408	32,123	15,460	8,385	23,845
Stamps	59,306	46,188	105,494	68,418	56,324	124,742	70,092	56,596	126,688
Ink-pads	12,430	7,526	19,956	14,078	9,867	23,945	14,431	9,842	24,273
Total	**912,469**	**452,749**	**1,365,218**	**1,000,986**	**528,413**	**1,529,399**	**938,703**	**535,809**	**1,474,512**

Source: Eurostat (2002)

Table 6.5 Exports of artists's materials by EU member countries between 1999 and 2001 in € (x 1000)

Productgroup	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Artists' colours (assorted)	20,810	13,772	34,582	26,386	17,441	43,827	24,295	22,252	46,547
Artists' colours	55,466	40,941	96,407	61,213	52,638	113,851	55,120	54,906	110,026
Colouring books	96,841	21,846	118,687	104,560	25,184	129,744	95,403	37,088	132,491
Brushes	41,868	33,514	75,382	52,331	33,344	85,675	50,353	38,678	89,031
Pencils	46,762	40,956	87,718	50,989	45,330	96,319	51,202	49,851	101,053
Pencil lead	5,573	9,449	15,022	5,678	10,667	16,345	5,124	11,149	16,273
Crayons	22,139	16,298	38,437	24,754	21,002	45,756	23,074	22,433	45,507
Total	**289,459**	**176,776**	**466,235**	**325,911**	**205,606**	**531,517**	**304,571**	**236,357**	**540,928**

Source: Eurostat (2002)

Table 6.6 Exports of cards by EU member countries between 1999 and 2001 in € (x 1000)

Productgroup	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Cards	144,801	77,969	222,770	174,735	77,621	252,356		74,110	231,659
Callenders	67,643	51,634	119,277	66,649	55,670	122,319	58,945	61,582	120,527
Total	**212,444**	**129,603**	**342,047**	**241,384**	**133,291**	**374,675**	**216,494**	**135,692**	**352,186**

Source: Eurostat (2002)

7 TRADE STRUCTURE

The stationery, office supplies and school items market has developed into an internationally transparent market. The completion of the internal EU market did not leave the distribution sector untouched. The introduction of the Euro Zone will strengthen the transparency of the market and fuel competition. In other words: strong competitive pressure will force margins down further.

The distribution structure is continuously developing. In addition to traditional trade channels, such as retail shops and department stores, new ones are emerging: mail-order firms, teleshopping and the Internet. Occasionally a brand-new firm will enter the market with new sales techniques, while traditional traders are broadening their service with new options like teleshopping, thus combining the wholesale and retail functions.

The ongoing internationalisation is influencing the distribution chain. EU companies are looking for foreign partners or strengthening their market positions by take-overs, mergers and various kinds of partnership – a trend that seems likely to continue in the coming years. Meanwhile, as more economies internationalise, product ranges continue to widen, further increasing the competition on the market.

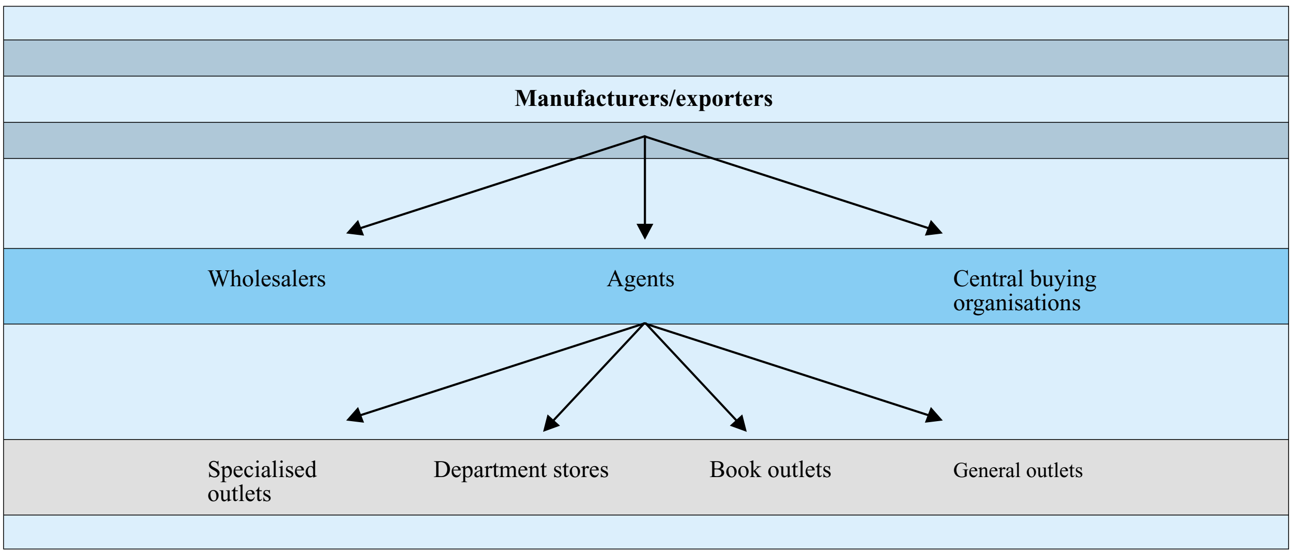
7.1 EU Trade channels

For exporters, the development of a reliable distribution channel is one of the most critical issues. The world of distribution is complex and frequently changing, partly as a result of technological progress. Selecting the right distribution channel for your company is vital. It is better to invest some extra time in developing a good relationship with a prospective importer than to make a hasty decision you may come to regret. Remember, too, that by selecting one trade channel you will often automatically exclude others. You cannot have a relationship with a wholesaler while at the same time entering the market with the same products through an agent. This is (generally) unacceptable to EU trade partners. If you try your export operations will definitely backfire on you.

The figure below shows the basic structure for the distribution of stationery, office supplies and school items in the EU.

Manufacturers/exports
Besides foreign manufacturers, who export directly, there are also specialised exporters who do not produce anything but merely trade (sometimes operating in various sectors at once). In some cases, foreign manufacturers/exporters do business with EU manufacturers as subcontractors or they complete the product range of the EU manufacturer (for example, by supplying the same type of product in a different quality and price setting).

Importers
Importers can be divided into wholesalers, agents and central buying groups. Their job is to supply the retailers. Retailers can be specialised outlets for stationery items, office and school supplies, book outlets, department stores and general outlets, such as supermarkets. In a few unusual cases, retailers import directly themselves.
Wholesalers and agents are the most specialised importers. Usually they sell imported products to retailers or big (business) accounts. In some cases they re-export their imports. Central buying groups only import the products they need for their own members. All these importers are familiar with the local market. In addition to their primary tasks of buying and selling,



keeping an administration of import and export procedures, and holding stock, therefore, they can supply considerable information and guidance to the overseas manufacturer. So developing a successful working relationship with your importer can lead to a high level of teamwork, providing you with appropriate designs and information on the latest market trends, use of materials and quality requirements.

Some wholesalers are specialised in school items and deliver directly to schools. Other wholesalers have traditional connections with local and central government offices and deliver directly to these offices. However, most wholesalers do not limit themselves to one product group but are general stationery traders. The wholesaler holds his own stocks at his own account and his own risk. By buying into his own account, the importer takes full ownership of the goods and is responsible for their sale and distribution. The average gross margin is 25-30% of his turnover.

Agents are more like intermediaries. They do not ‘take a stand’ on the products they handle. The agent may serve as an intermediary between the manufacturer and the wholesaler or retailer, receiving a commission from the former. The level of the commission depends on a number of factors, including the turnover rate of the product concerned (it averages an estimated 10-15% of his turnover).
Most agents represent more than one manufacturer, although they do avoid competition. Contrary to a wholesaler, an agent will not hold any stock at his own risk. More and more agents are starting to sell from stock, however, in order to meet the short-term demands of clients. Stock forming often takes place on a consignment basis. If the agent decides to build up his own stock, he has in fact become a wholesaler.

Co-operation, mergers and take-overs
The EU wholesale trade is strongly internationally oriented. The wholesale trade is faced with powerful negotiating partners on the side of their suppliers, which exert pressure on profit margins. Large companies can, for example, set up their own distribution centres, taking over the function of suppliers. Similarly, though, manufacturers can set up their own order systems.
Concentration on the market offers the wholesale trade opportunities as well, for instance through the trend towards farming out distribution. Otherwise, due to its knowledge of the market, the wholesale trade can fulfil a function for foreign manufacturers, especially those outside the EU.

Sales outlets
Retailers constitute the final stage before products reach the consumer. Stationery items can pass a wide range of retailers, from specialised outlets whose primary business is stationery items, to department stores, general outlets such as supermarkets, post offices, petrol stations, and book outlets.
The various retailing outlets apply different sales formulae. In other words, they have different assortments of products, target different consumer groups and try in various ways to distinguish themselves from competitors. In order to understand the market, it helps to make a distinction between ‘service retailers’, who offer the consumer substantial added value (quality, service, choice et cetera), and ‘low margin retailers’, who offer the price-conscious consumer low prices at the expense of quality, service and choice. Service retailers are often referred to as being at the upper end of the market, while low margin retailers are at the lower end; between those two extremes there is range of mid-market outlets.

Specialised stores offer the consumer substantial added value. Besides stationery items, these stores generally also offer a (wide) range of office furniture and office machines. They can be characterised as complete suppliers, acting especially within the sector of business stationery items.

Department stores provide the private consumer with an opportunity to buy a wide range of products under one roof. They use stationery items to complete their assortment and profit from the relatively high margins. Book outlets traditionally supply a wide range of stationery for private use.

In the (near) future, many European supermarkets are expected to expand product range to include stationery items. Meanwhile mail-order firms are growing rapidly, especially in the field of business stationery items. This trend may be followed by rising Internet sales as consumers discover the Internet as an alternative way of buying stationery.

New distribution channels
Concentration and economy of scale are key issues in the retail trade. New commercial organisations such as buyer-groups and retailer co-operatives are taking on wholesale trade functions. Wholesale is generally shifting towards retail, due to dynamic and increasingly differentiated consumer behaviour.
Specialised logistic companies pose another threat to the wholesaler’s functions of transport, stocking and packaging. However, there are also opportunities in that direction, as service providers (distributors) farm out the work formerly done by the wholesale trade.

Another option for wholesalers is to increase their scale by means of partnerships, take-overs or mergers. Wholesale activities will increasingly have to be combined with other activities, such as retailing and service provision.

Both wholesalers and retailers will be under increasing pressure in the next few years from new distribution channels, aggressive mail-order firms, contract stationers (i.e. suppliers to the industry and big companies) and stationery supermarkets.

7.2 Distribution in the European countries

The Netherlands

Department stores

Department stores provide the consumer with an opportunity to buy a wide range of products under one roof. Most department stores are members of chains and have a centrally organised buying department; most other stationery imports go through independent agents. Department stores mainly sell stationery and school items.

Well-known department stores in the Netherlands include De Bijenkorf, Vroom & Dreesmann (V&D) and Hema. De Bijenkorf stocks high quality, stylish and appropriately priced products. V&D operates mid-market. The Hema has good quality at lower prices; it sells most of its articles under a private label. De Bijenkorf has 6 outlets throughout the Netherlands, V&D about 54 and Hema about 180.

Table 7.2.1 Market shares in 2000

Channels	%
Stationery specialists	52
Super stores	18
Internet	3
Others (department stores, book outlets et cetera)	27

General outlets

General outlets sell various consumer goods and school items or gift sets. On the private consumer-oriented market, there is an increasing number of these outlets. They include (food) supermarkets, tobacco shops, toy shops, gift shops, jewellery shops and cash-and-carry outlets. There are about 5,000 general outlets in the Netherlands.

Book outlets

Book outlets sell books, stationery and school items, which include greeting cards, paper products and writing instruments. There are about 1550 recognised book outlets in the Netherlands. There are three franchise organisations in this distribution chain: Bruna (375 outlets), AKO and The Read Shop (both about 60 outlets).

Specialised outlets

Specialised outlets only sell office supplies (and office furniture and office machinery). Most of them – about 850 outlets in the Netherlands – target private consumers. The rest – about 200 outlets – cater for business consumers. The specialised outlets buy about 50% of their products from Dutch wholesalers, about 40% from a central buying group, and the remaining 10% from manufacturers or foreign exporters.

On the business market, the specialised outlets are faced with strong competition from manufacturers and wholesalers, particularly in the office paper and machinery supplies segments.

Other store groups that sell office supplies and school items are the Makro (6 outlets) and the Postkantoorwinkels (Post office stores; more than 85 outlets). Besides these, there are mail-order firms (such as Viking) and business supermarkets for commercial stationery, office and computer supplies (such as Office Centre, which has 33 outlets).

Central buying groups

Central buying groups are among the most important co-operatives, besides different types of franchising, dealers and service merchandising. In the Netherlands there are three of these buying groups. Together they have about 830 members. The largest of the three, Quantore, is the result of a merger between the two formerly most important groups, CIB (Centraal Inkoop Bureau, Central Buying Group) and Veneka (Vereniging Nederlandse Kantoorvakhandel, the Dutch Union of Office Products Dealers). Quantore has 550 members, either independent office products dealers or retailers. Hameco, is the second largest Dutch buying association. It has 260 members.

The Gras Groep, finally, a buying group of Graphics & Art supply Stores, has about 33 retail members.

Quantore is a stockholder and operates similarly to a wholesaler. It is affiliated with the central buying group EuroBuro, based in Amsterdam. Quantore organises two annual ‘buying days’ for its members. Hameco does the same in cooperation with wholesalers.

Belgium

About 60% of the Belgian market is in the hands of office products resellers and sale points that realize at least 50% of their turnover in the business-to-business segment. A substantial part of Belgium’s office supplies (17.5%) goes directly from the manufacturer to the end user. Mail ordering is another common form of office supplies distribution in Belgium, accounting for about 10% of domestic turnover in this sector.

The turnover of office supplies (again including paper) among private consumers with school children amounted to US$ 290 million in 2001. The majority of these private consumers bought the merchandise at small sale points. The share of the department stores in this sub-segment is relatively small: they account for just over 32% of all purchases.

The number of sale points in Belgium is slightly decreasing. Since 1998 their number has dropped by 3.5%. In the year 2000 there were 4,700 of them left. A quarter of those (1,190) are specialized office products dealers. About 950 of these target private consumers with school children by means of paper lines and so-called social stationery. About 230 sale points are specialized in selling both office supplies, paper and office equipment, machines and furniture.

The majority of the sale points in Belgium sell a mixed range of products. Besides office supplies they offer magazines, newspapers and tobacco. Interestingly, this particular group has seen a significant increase in its sales of computer supplies (a 49% rise since 1998).

Belgium had about 10 mail order distributors in 2000. Their share has grown considerably: in 2000 they achieved a combined turnover of almost 100 million – double the figure for 1998.

France

In France, stationery and local chains have long been the most significant distribution channel for stationery items, office and school supplies. In 1999 they held a 48% share in terms of sales value. Local chains are franchised, such as Buro+, Plein Ciel, Calipage or Majuscule, and target both domestic and company buyers. These outlets have benefited from the trend towards working from home.

Table 7.2.2 Market shares in 2000

Channels	**%**
Stationery specialists / local chains	48.0
Hypermarkets, supermarkets, and superstores	32.0
Independent traditional outlets	18.0
Others	2.0

However, hypermarket and supermarket chains have made significant headway in retail distribution, raising their share in terms of value by 15% since 1992. The increase is mainly due to the ability of these stores to offer broad ranges of items and cheap private label products, as well as discounts on branded products. Local chains such as Plein Ciel, which also operate hypermarkets and supermarkets, continue to develop strongly, though, often taking over favourably located independent shops and stationery specialists in town centres.
As a result of these developments, traditional independent outlets are unable to offer competitive prices and product ranges and have lost share to the large retailing chains.

Germany

Specialist stationers remain the most important retail outlets for stationery products in Germany. In 2000 they held a 66.5% market share. Their position remains fairly stable, as German consumers traditionally prefer to buy from them. Here, too, however, increasing competition from discounters, mail order firms, department stores and more recently, cash-and-carry stores and hypermarkets, is taking its toll. Specific products, such as fountain pens, are still more likely to be bought in specialist stationery outlets, whereas more common items like exercise books are more likely to be purchased in hypermarkets.

Table 7.2.3 Market shares in 2000

Channels	**%**
Stationery specialists	66.5
Hypermarkets	8.1
Department stores	7.8
Discounters	6.8
Mail order	3.5

The new cash-and-carry concept initiated by Schwan Stabilo, Edding and Schreyer, holding onto specialization while offering the price benefits of mass marketing, may well prove successful and alter current distribution trends in the next few years.
Discounters, specialist suppliers of office equipment and mail order companies have been very successful in offering better value products.

United Kingdom

In the UK so-called dealer groups play an important role in the distribution of stationery items and office supplies. Dealer groups consist of independent dealers united in co-operatives or groups. Recently the UK had 13 such groups. The three largest in terms of membership are Office Point (400 members), Integra (370) and Office Club (340). The market share of dealer groups across the entire distribution channel was around 65% in the past few years.

Due to globalisation, internationalisation and the disappearing of borders within the EU, the UK has become the most important distributor in the EU.
The completion of the EU's internal market has affected the distribution sector in other ways, too. In particular, distributors of stationery, office supplies and school items have created a lot of benefits for themselves. The growing internationalisation, which appears in the form of USA distributors/exporters on the UK market, has helped. Several (large) USA companies for office products, such as Staples, Office Depot/Viking, Maxi-Paper and Office World, have established subsidiaries or merged with (or taken over) distributors in the UK

because of the absence of a language barrier. Some of them have gone further and have established branches on the European continent, notably in German and France.

7.3 Distribution channels for developing country exporters

The above clearly illustrates the important roles of importers, wholesalers, buyer organisations and agents in the distribution of stationery items, office and school supplies and as intermediaries between producers, retailers and end users.

Companies like mail-order firms and buyer cooperatives prefer to acquire their products directly from the manufacturer if the volume being bought is large enough. In such cases, the wholesale trade is by-passed. This channel generally is not a realistic option for exporters from developing countries, however, because of the large volumes involved and due to the high demands these market parties place on logistic aspects such as distribution, delivery and storage.

More interesting parties for exporters from developing countries are agents, stock-keeping wholesalers, suppliers and importers. These usually have extensive networks of buyers (customers), including both retail traders and retail chains and are directly linked to end users and professional buyers (the business-to-business segment). Many important traders and distributors active in the different European countries are mentioned in this survey (see Appendix 10).

For developing a relationship with these importing businesses that will provide a basis for successful export activities, personal contact is key. It is the best starting point. Making maximum use of your communication possibilities – including the Internet – should be an integral part of intensifying the relationship.

Language barriers

Although language barriers no longer exist for many exporting producers, producers in Spanish-speaking South-American developing countries may do well to consider building up their first European contacts with buyers in Spain. From there, they can extend their circle of buyers to other European countries.

Visiting specialised trade fairs is an outstanding means getting in touch with potential buyers. In the field of stationery, the Paperworld trade fair that takes place in Frankfurt, Germany, each year at the end of January is the leading international meeting point for producers and buyers and thus offers the best possibilities for exploring the market and making personal contacts.

Other important national fairs with an international character are the International Spring Fair (ISF) in Birmingham, UK, and the Chibi & Cart fair in Milan, Italy (for more information see Appendix 5).

8 PRICES AND MARGINS

Besides quality, pricing is one of the most important aspects of trading. Exporters from developing countries visiting European stationery outlets or browsing European catalogues may be surprised at how high prices seem to be in relation to their own low production prices. In this chapter, we'll look at the reasons for these differences.

As an exporter, you can strongly influence the retail price by focussing on efficient production and reduced cost prices. Every 1% reduction of the cost price will result in a 4 to 5% reduction of the retail price.

8.1 Margins

Margins vary throughout the different distribution channels. They're influenced by many factors. The most important one is product quality. Others include:

- Risk level;
- Volume (order size);
- Functions or marketing services rendered;
- Length of the distribution chain;
- General economic conditions;
- Competition;
- Exclusiveness.

Other factors – such as wages, rent and overhead costs, which may differ from one EU country to the next – may also affect margins. Also, trademarks, brands and property rights influence margins, as do product characteristics like styling and design. The expected increase of private labeling offers manufacturers in developing countries good opportunities to use this mechanism to their advantage.

There are several ways of finding out what margins are appropriate. In the case of 'fixed' consumer prices, the margin is usually about 45 to 55% (depending on the type of product and the market situation). The wholesaler/importer is free to decide how he divides this margin between himself and the retailer. The manufacturer may, of course, grant discounts during promotional actions to stimulate the sales of certain products.
If there is no fixed consumer price, the importer/wholesaler might add about 25% to 35% to his buying price, as far as the competition in the market allows.
Agents who do not hold stock generally get a 10 to 15% commission on every order they place. The percentage will be lower or higher according to the size of the order.
Retailers generally make a 50% profit on the price they've paid to their supplier.

8.2 Prices

Stationery items are sensitive to economic fluctuations, but European consumers are generally willing to pay a higher price for a better product. As a rule, importers who import from developing countries are looking for low-priced merchandise (of a good quality).

Office supplies
In the office supplies market, price and quality are important keys to success. However, in view of the increasingly fierce competition in this market, price has become the most important factor. This is especially true for generic, or basic, products, such as paperclips, staples et cetera. Another major reason for the importance of price is that consumers normally purchase office supplies in large quantities. The SoHo consumer purchasing for his own office is the single exception to this, although this segment of the market is generally price-conscious as well.
The price of a product will, at the retail level, typically reach 2 to 2.5 times the Free-On-Board price paid by the importing company. In an intensely competitive environment like this one, there is little room for increases. Importers usually decide whether or not a product is worth buying by calculating the approximate retail price, subtracting the landed cost of the product and dividing that by the retail price to determine the purchasing mark-up (PMU). Mark-ups are even lower in the case of generic products.

School supplies
In the market for stationery, particularly school supplies, price plays an important role, too, but other factors are equally, if not more, important. For instance, design and style are essential, as this market is more consumer-oriented. Consumers will pay more for exclusive, stylish products. Importers and distributors who work with the consumers and understand their wishes will often create their own design and send these to suppliers asking for samples.
Mark-ups are usually higher in the stationery market. Generally speaking, you could say that the more novel an item is, the greater the mark-up will be. It is quite common, for example, to find products selling at the retail level for 3 or 3.5 times more than the FOB price. This is particularly true for products never seen on the market before. As soon as the competition introduces a similar product, prices are driven down.

Export prices
The most practical way of communicating about prices with an importer is to refer to one of the so-called Incoterms. Incoterms were set up by the International Chamber of Commerce to eliminate any possibility of

misunderstanding and subsequent dispute. They provide international rules for the interpretation of the most commonly used trade terms in foreign trade. Furthermore, it is useful to calculate export prices in US$.

Pricing method
Generally speaking, the retail price is built up with the following components:

- FOB price in USD;
- International transport and insurance costs;
- Import duties;
- Domestic handling, transport and insurance costs;
- Importers margin;
- Wholesalers margin;
- Retail margin;
- VAT (value-added tax).

A few pricing differences occur between different market segments: in the private consumer market prices include VAT; in the business market, prices mostly do not include VAT. VAT rates in the EU vary from 12 to 22.5%. In the Netherlands, the rate is 19% (for more detailed information, see section 1.2.2 of the CBI's 'EU Strategic Marketing Guide, Stationery items, Office and School Supplies').

Figure 8.1 provides an illustration of the pricing system described above, using a product with an FOB price of US$ 20.00. The example shows that an FOB price in US$ has to be multiplied by about 3.3 to get the retail price in €. Obviously, the calculation is influenced by a number of variables, such as import duties and the exchange rate of the US$ and the €.

Importers are consumer-oriented, which means that they first select good quality products according to their already established assortment. Secondly, they establish an acceptable consumer price. In other words, they calculate backwards, relating their feeling about consumer prices to a maximum FOB price. For example, if an importer is looking for an exercise book with a retail price of no more than € 0.40, he will pay a maximum FOB price of US$ 0.13.
Large manufacturers of well-known brands sometimes suggest fixed consumer prices and then offer the wholesaler/importer or retailer a reduction.

8.3 Sources of price information

Export price always depend on negotiations between exporter and importer. However, retail prices can be found in stationery magazines, promotional material and catalogues. A number of consumer-related magazines frequently publish information on the general (end user) price levels (for addresses of publishers, see Appendix 3). The Internet is also a good means of obtaining (price) information (for useful websites, see Appendix 12).

Figure 8.1 Indication of pricing method

	in %	in US$	in US$	Exchange	in €
Fob price in US$			20.00	1.1	22.00
Transport/insurance	15	3.00			
Sub-total			23.00		25.30
Import duties	5	1.15			
Sub-total			24.15		26.57
Importers margin	15	3.62			
Sub-total			27.77		30.55
Wholesalers margin	20	5.55			
Sub-total			33.33		36.66
Retailers margin	50	16.66			
Sub-total			49.99		54.99
VAT	19	9.50			
Retail price			**59.49**		**65.44**

9 OPPORTUNITIES FOR EXPORTERS

Several exporters from developing countries are already in business with importers in the EU. Their experience proves that, generally speaking, imported products have to have a good quality and a competitive price. Other important aspects for importers are the logistic handling (including packaging) and the reliability of the exporter. Reliability also applies to the way of doing business, in particular communications in the pre-sales stage (by phone, fax or e-mail, and in English) and the fulfilling of agreements in a dependable way.

At the lower end of the market there are a number of opportunities for exporters from developing countries. If you can offer a good price and the quality is up to standard, you may find room for market entry. At the higher end of the market opportunities also exist, especially for novelty items. Reliability and consistency of supply are two keys to successful market entry.

Below is a list of product groups and the export opportunities they do or do not represent.

Paper products
Exporters of paper products have to comply with EU standards concerning paper size and quality (i.e. brightness and opacity). Some exporters, especially from the Far East, have blocked their own road by offering products that do not comply with these standards. An important quality for office paper (copying, fax and printing paper) is that it does not cause any damage to the office machines it is intended for, for instance by being dirty.
Handmade paper products account for a relatively small part of EU paper consumption. Their use is generally limited to creative activities, unusual paper products or exclusive correspondence sets (writing paper and envelopes sealed in packages of 10 pieces each).
Exercise books, writing pads and the like have to be bound in good-looking covers (colourful and attractively designed) to make it into Europe. The quality of the ruling and the binding is also important. As for writing pads, a micro-perforation at the top is desirable.
Please note that the requirements of ECO (or green) labels can differ from those applied to paper and paper products until now.
The production of labels in developing countries is not very well developed. A problem in this field is the potential interruption of the addressing machines that the labels are fed into.

Writing and drawing instruments
Because of the presence of several very strong international producers/exporters, the competition on the market for writing and drawing instruments is tough. The high-end and middle of the market are dominated by internationally known brand names such as Parker, Cross and Mont Blanc. Penetrating this market would be difficult for exporters from developing countries. At the high-end of this market, a consumer does not buy a ball-point or a fountain pen, but a famous brand name. At the low-end of the market, price competition is fierce and production has to be highly computerised.

A number of pens from developing countries (individual pens, sets of two or sets of one pen and one pencil) have entered the European market. They are low-quality and low-price imitations of high-end products.
Refillable ball-points are becoming increasingly popular. Refillable rolling balls with an attractive barrel design are strong sellers and exporters from developing countries could find a market for these products, provided they can compete with Chinese and Korean pens.
The use of water-based ink has become a 'must' for environmental reasons. A ventilated cap is necessary when intended for use by children.

Other desk and school supplies
In the Other desk and school supplies segment a form of dumping is taking place. For example, ring binder mechanics are coming onto the EU market in high volumes at very low prices. A good price-quality relation is very important in the market for binders and folders.
On the market for glue sticks competition is intense and the market is dominated, not to say controlled, by high-quality brand names like Pritt and Uhu. Opportunities for market entry are very limited here. There may be opportunities for exporters of non-toxic transparent glue for children in containers with an attractive, child-oriented design.
In the field of basic items (paperclips, staples and the like), the price, which depends on international metal prices, is the only factor that will determine whether or not market entry is feasible.
Computer-related supplies are part of a booming market. Quality (reliability) is of great importance in this sub-segment.

Artists' materials
Traditionally, developing countries have a strong position on the market for artists' materials. In the last few years it has become essential for exporters to comply with the CE marking requirements. The quality of pigments and the packaging of individual products are also important factors.

Cards and calendars
Cards and calendars in themselves are not very interesting as export products. Communication with the importer during the pre-production period (pre-press) tends to pose problems. The distinct difference in design and styling between EU and developing countries also limits possibilities.

Implications for exporters
If you're aspiring exporter, the best long-term strategy is to seek a partner who is well acquainted with the EU market situation. Potential partners are buying organisations, wholesalers and agents. Also, you should think of some kind of licensing to establish ownership. The expected rise of private labelling offers manufacturers in developing countries interesting prospects.
Co-makership is gradually replacing the traditional buyer-seller relationship. Co-makership constitutes an agreement for two business partners to operate as a team. It can be an effective way for exporters from developing countries to comply with the changing market requirements and legislation in the EU.

APPENDIX 1 DETAILED IMPORT/EXPORT STATISTICS

The source of the data presented below is Eurostat.

IMPORTS

Imports of stationery items, office and school supplies by EU member countries between 1999 and 2001 in € (x 1000)

Country	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Germany	666,399	479,704	1,146,103	875,118	588,142	1,463,260	847,681	578,866	1,426,547
UK	642,504	512,282	1,154,786	706,324	658,217	1,364,541	657,254	643,640	1,300,894
France	729,273	210,733	940,006	798,669	257,124	1,055,793	785,015	248,060	1,033,075
Netherlands	352,504	137,564	490,068	358,772	195,852	554,624	360,051	203,335	563,386
Belgium	400,924	124,712	525,636	464,653	132,232	596,885	407,357	147,247	554,604
Italy	292,845	153,073	445,918	351,836	177,243	529,079	330,096	182,117	512,213
Spain	247,384	104,335	351,719	347,052	123,344	470,396	318,965	122,066	441,031
Austria	208,926	66,467	275,393	210,647	106,582	317,229	211,010	148,941	359,951
Sweden	129,426	68,302	197,728	127,128	79,396	206,524	124,078	70,865	194,943
Ireland	130,809	28,205	159,014	152,527	46,153	198,680	151,747	30,859	182,606
Denmark	142,728	37,168	179,896	134,069	43,041	177,110	137,731	43,606	181,337
Portugal	98,439	12,427	110,866	98,073	13,920	111,993	103,961	12,124	116,085
Finland	69,120	16,765	85,885	72,799	20,683	93,482	75,901	23,046	98,947
Greece	78,609	20,729	99,338	78,443	25,449	103,892	68,993	26,610	95,603
Luxembourg	37,737	865	38,602	40,013	798	40,811	49,070	1,475	50,545
Total	**4,227,627**	**1,973,331**	**6,200,958**	**4,816,123**	**2,468,176**	**7,284,299**	**4,628,910**	**2,482,857**	**7,111,767**

Imports of stationery items, office and school supplies by EU member countries between 1999 and 2001 in tonnes

Country	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Germany	409,768	140,253	550,021	533,046	155,827	688,873	547,452	166,130	713,582
UK	383,750	208,716	592,466	560,911	221,113	782,024	300,952	228,022	528,974
France	337,206	41,086	378,292	342,977	43,366	386,343	306,387	45,188	351,575
Belgium	182,339	119,566	301,905	183,425	91,371	274,796	167,159	126,883	294,042
Netherlands	168,667	29,179	197,846	164,840	87,596	252,436	160,886	66,046	226,932
Austria	48,810	42,188	90,998	48,077	80,709	128,786	71,060	121,458	192,518
Spain	115,862	36,491	152,353	164,910	33,896	198,806	130,272	41,029	171,301
Italy	103,607	65,221	168,828	135,338	47,230	182,568	119,750	48,973	168,723
Greece	34,415	6,817	41,232	145,760	7,571	153,331	90,659	12,916	103,575
Denmark	33,999	12,008	46,007	43,102	11,558	54,660	38,024	13,453	51,477
Ireland	35,413	3,165	38,578	40,864	4,710	45,574	37,649	4,157	41,806
Sweden	33,246	19,155	52,401	32,524	20,433	52,957	23,058	18,523	41,581
Finland	22,209	4,111	26,320	18,469	6,669	25,138	20,398	9,615	30,013
Portugal	25,080	1,861	26,941	23,373	1,643	25,016	25,973	1,264	27,237
Luxembourg	9,372	193	9,565	9,974	118	10,092	8,472	177	8,649
Total	**1,943,743**	**730,010**	**2,673,753**	**2,447,590**	**813,810**	**3,261,400**	**2,048,151**	**903,834**	**2,951,985**

Imports of *handmade paper* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	**2000**	**2001**
Total	46,956	39,280	24,578
Extra-EU	1,430	3,306	4,254
Developing countries	744	796	2,577
Top 5 suppliers Developing countries			
China	34	49	1,250
India	252	210	380
Philippines	80	158	290
Thailand	266	290	290
Nepal	67	71	161

Imports of *envelopes* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	**2000**	**2001**
Total	322,074	375,299	392,504
Extra-EU	51,082	61,740	65,581
Developing countries	5,053	6,316	9,578
Top 5 suppliers Developing countries			
Indonesia	-	-	2,834
Slovenia	2,668	2,428	2,731
China	821	1,851	1,608
Mexico	1,041	1,432	1,587
India	107	177	229

Imports of *post sheets and correspondence cards* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	**2000**	**2001**
Total	13,220	11,907	13,013
Extra-EU	6,523	3,608	4,058
Developing countries	870	1,177	1,862
Top 5 suppliers Developing countries			
China	414	668	1,455
Indonesia	-	-	113
India	58	135	87
Thailand	150	113	84
Bangladesh	1	7	21

Imports of *correspondence sets (in boxes or in sets)* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	34,791	57,054	36,773
Extra-EU	18,626	21,943	20,031
Developing countries	8,148	13,235	14,822
Top 5 suppliers Developing countries			
China	5,595	9,749	10,718
Slovenia	1,121	1,726	1,747
Indonesia	-	-	852
Thailand	258	258	619
South Korea	158	108	145

Imports of *registers, account blocks, order blocks, receipt blocks, writing pads, note pads, note books and memorandum pads* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	426,856	469,315	416,413
Extra-EU	166,210	185,246	171,311
Developing countries	105,259	120,807	121,056
Top 5 suppliers Developing countries			
China	83,983	94,532	83,508
Indonesia	-	-	11,421
India	5,124	6,913	8,035
Malaysia	7,251	7,690	6,902
South Korea	2,547	3,674	3,816

Imports of *exercise books* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	34,039	42,427	44,214
Extra-EU	15,428	20,221	21,399
Developing countries	2,037	4,066	15,762
Top 5 suppliers Developing countries			
Indonesia	-	-	10,069
China	1,299	3,257	3,495
India	140	192	1,128
Slovenia	1	-	767
Malaysia	279	190	126

Imports of *files, folders and binders* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	158,444	179,315	165,231
Extra-EU	39,690	53,750	53,561
Developing countries	12,835	16,020	16,519
Top 5 suppliers Developing countries			
China	7,033	9,178	7,541
Malaysia	1,888	3,546	5,083
Tunisia	2,067	1,902	2,148
Indonesia	-	-	668
India	142	150	219

Imports of *forms in sets* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	41,343	48,868	59,161
Extra-EU	5,929	6,786	8,215
Developing countries	264	277	262
Top 5 suppliers Developing countries			
China	133	98	86
Slovenia	30	137	62
Croatia	23	24	34
Argentinia	1	-	28
Indonesia	-	-	24

Imports of *labels printed* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	506,223	558,474	572,641
Extra-EU	77,049	89,300	86,399
Developing countries	7,218	7,965	8,883
Top 5 suppliers Developing countries			
China	4,066	4,553	4,972
Slovenia	1,179	894	996
South Korea	527	580	597
Indonesia	-	-	590
Tunisia	233	204	399

Imports of *labels not printed* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	146,477	153,064	151,251
Extra-EU	24,734	32,450	32,075
Developing countries	1,883	3,383	4,053
Top 5 suppliers Developing countries			
China	622	1,516	1,875
South Korea	218	332	413
Trinidad	207	302	390
Mexico	10	100	243
Tunisia	74	621	307

Imports of *continuous forms* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	88,052	49,968	51,886
Extra-EU	39,416	15,426	12,304
Developing countries	939	1,129	3,139
Top 5 suppliers Developing countries			
Indonesia	-	-	1,735
China	661	724	907
Slovenia	119	193	159
India	10	115	127
South Africa	2	63	60

Imports of *paper and cardboard for office machines* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	1,252,044	1,667,754	1,778,027
Extra-EU	289,173	401,697	506,005
Developing countries	76,920	100,559	169,170
Top 5 suppliers Developing countries			
Brazil	62,301	78,003	79,467
Indonesia	-	-	45,089
South Africa	6,625	5,286	22,413
China	1,741	409	8,882
Slovenia	3,199	8,821	5,623

Imports of *ball-points* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	507,163	638,807	596,782
Extra-EU	256,262	254,773	342,009
Developing countries	49,097	85,545	109,741
Top 5 suppliers Developing countries			
China	26,066	46,467	60,484
India	10,962	17,437	21,004
South Korea	4,567	11,980	17,189
Vietnam	2,292	2,766	2,574
Thailand	1,093	1,936	2,157

Imports of *markers and highlighters* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	245,294	274,106	257,688
Extra-EU	103,761	127,765	113,040
Developing countries	24,750	36,663	35,423
Top 5 suppliers Developing countries			
China	14,394	22,616	22,559
Malaysia	3,996	5,356	4,038
South Korea	1,442	2,638	3,534
India	830	1,340	1,208
Croatia	1,213	1,228	1,189

Imports of *drawing pens* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	9,632	9,814	6,087
Extra-EU	1,991	2,159	1,996
Developing countries 2	53	407	494
Top suppliers Developing countries			
China	210	316	449
Thailand	22	37	36

Imports of *fountain pens* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	**2000**	**2001**
Total	72,708	76,291	67,177
Extra-EU	20,939	27,051	24,117
Developing countries	2,704	5,179	4,458
Top 5 suppliers Developing countries			
China	1,418	3,285	3,126
Slovenia	215	366	334
Tunisia	423	628	331
India	205	316	282
South Korea	298	220	174

Imports of *propelling pencils* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	**2000**	**2001**
Total	43,149	54,101	51,258
Extra-EU	22,552	30,318	26,032
Developing countries	3,423	5,520	5,775
Top 5 suppliers Developing countries			
Thailand	1,332	2,044	2,665
China	893	1,708	1,896
South Korea	807	1,216	716
India	86	278	338
Brazil	191	203	77

Imports of *assortment of writing instruments* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	70,098	86,526	79,146
Extra-EU	22,993	36,034	29,600
Developing countries	8,496	13,663	14,949
Top 5 suppliers Developing countries			
China	6,841	11,726	13,137
India	614	788	895
Colombia	-	-	164
Malaysia	160	469	153
South Korea	219	115	126

Imports of *refills for ball-point pens* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	32,929	38,438	32,487
Extra-EU	12,630	14,982	14,185
Developing countries	984	1,329	1,193
Top 5 suppliers Developing countries			
China	287	399	499
India	344	297	293
South Korea	197	184	131
Mexico	13	133	106
Slovenia	127	85	103

Imports of *pen nibs and nib points* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	24,670	32,891	29,983
Extra-EU	16,083	21,109	20,030
Developing countries	856	1,430	1,112
Top 5 suppliers Developing countries			
India	375	418	407
China	308	556	301
Thailand	41	217	276
Mexico	6	32	85
South Korea	-	141	23

Imports of pen *holders, pencil holders, refills for felt-tipped, refills for fibre tipped pens and parts of ball-points, markers and fountain pens* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	76,714	82,749	76,827
Extra-EU	44,783	48,529	46,428
Developing countries	4,090	4,777	5,278
Top 5 suppliers Developing countries			
China	1,549	2,329	2,134
India	1,405	908	1,785
Slovenia	579	959	659
South Korea	96	145	547
Philippines	46	64	45

Imports of *office and school supplies* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	**2000**	**2001**
Total	660,275	784,737	728,932
Extra-EU	190,040	258,144	232,283
Developing countries	72,440	115,892	104,866
Top 5 suppliers Developing countries			
China	54,457	93,655	89,408
South Korea	5,747	7,818	7,228
Thailand	3,351	4,433	5,081
Slovenia	2,371	2,831	2,871
Mexico	988	1,856	2,450

Imports of *erasers of vulcanised rubber* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	**2000**	**2001**
Total	11,063	12,151	11,989
Extra-EU	6,289	7,026	7,627
Developing countries	3,099	4,247	4,803
Top 5 suppliers Developing countries			
China	1,540	2,202	3,207
Malaysia	854	943	862
Mexico	324	514	383
South Korea	104	220	186
Thailand	90	288	116

Imports of *gummed paper and tape, auto-adhesive* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	**2000**	**2001**
Total	232,828	253,219	224,204
Extra-EU	46,981	57,556	45,681
Developing countries	8,764	13,542	9,971
Top 5 suppliers Developing countries			
Mexico	4,006	5,063	3,340
Croatia	2,387	4,572	2,666
China	620	1,551	2,150
South Korea	902	775	662
Vietnam	197	379	395

Imports of *letter openers, knives and pencil sharpeners* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	31,207	36,275	34,414
Extra-EU	20,786	24,705	23,954
Developing countries	12,314	15,025	13,517
Top 5 suppliers Developing countries			
China	10,913	13,433	11,882
South Korea	643	813	712
India	529	549	582
Philippines	67	88	109
Thailand	50	20	63

Imports of *filing cabinets, card-index cabinets, paper trays and pen trays* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	48,557	51,283	51,412
Extra-EU	21,524	23,472	26,166
Developing countries	13,100	13,189	13,553
Top 5 suppliers Developing countries			
China	7,817	10,985	11,712
South Korea	1,006	1,259	1,184
India	78	161	186
Malaysia	52	33	114
Indonesia	-	-	58

Imports of *fittings for loose-leaf binders or files* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	104,149	114,019	98,384
Extra-EU	44,987	50,562	46,715
Developing countries	28,813	34,227	35,077
Top 5 suppliers Developing countries			
China	16,350	20,534	20,473
Slovenia	6,791	7,010	7,268
India	3,664	4,636	3,274
Indonesia	-	-	2,181
Thailand	1,658	1,635	1,780

Imports of *staples* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	55,391	65,102	65,099
Extra-EU	16,808	20,228	21,818
Developing countries	3,371	4,800	6,836
Top 5 suppliers Developing countries			
China	2,607	4,195	5,935
South Korea	530	290	369
Mexico	80	115	214
India	20	83	73
Colombia	-	-	66

Imports of *paper clips* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	20,560	26,570	29,913
Extra-EU	10,274	15,475	18,625
Developing countries	4,687	7,643	12,050
Top 5 suppliers Developing countries			
China	3,792	6,076	8,976
Slovenia	294	440	1,210
Indonesia	-	-	1,045
South Korea	369	554	329
India	110	249	141

Imports of *stamps for dating, sealing and numbering* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	76,078	79,110	75,623
Extra-EU	24,209	23,573	21,259
Developing countries	9,230	11,117	10,870
Top 5 suppliers Developing countries			
China	6,370	8,522	5,667
Malaysia	1,907	1,594	2,831
South Korea	684	657	1115
Philippines	175	204	991
India	34	25	55

Imports of *ink-pads* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	18,184	18,451	17,242
Extra-EU	6,452	6,423	6,368
Developing countries	1,641	1,549	1,504
Top 5 suppliers Developing countries			
Thailand	965	1,038	935
China	363	302	263
Malaysia	238	137	232
South Korea	23	57	37
Slovenia	34	2	12

Imports of *artists´ coulours in tubes and bottles (assortment)* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	38,069	44,297	51,679
Extra-EU	16,119	16,899	21,356
Developing countries	7,383	10,304	12,095
Top 5 suppliers Developing countries			
China	6,193	9,678	10,342
Tunisia	-	16	1,124
Malaysia	733	426	433
South Korea	373	123	64
Brazil	8	9	64

Imports of *artists´ coulours in tubes and bottles* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	68,976	85,856	73,850
Extra-EU	19,795	28,455	18,529
Developing countries	3,871	8,279	3,080
Top 5 suppliers Developing countries			
China	3,055	7,238	2,307
South Korea	471	709	645
Brazil	23	42	36
India	63	15	2
Slovenia	8	28	21

Imports of *picture, drawing and colouring books for children* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	113,444	122,286	116,086
Extra-EU	43,123	50,676	50,595
Developing countries	21,350	28,292	33,019
Top 5 suppliers Developing countries			
China	13,816	20,809	24,699
India	2,491	3,005	2,505
Thailand	2,540	2,124	2,391
Malaysia	1,618	1,513	1,779
Indonesia	-	-	848

Imports of *brushes by EU member countries, by country of origin,* between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	82,919	101,218	107,197
Extra-EU	50,705	67,205	71,162
Developing countries	36,962	50,869	53,398
Top 5 suppliers Developing countries			
China	18,823	28,400	30,586
South Korea	14,479	18,384	17,340
India	1,565	2,179	2,369
Dominican R.	542	441	1,762
Sri Lanka	795	736	657

Imports of *pencils with graphite or coloured pin* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	106,996	127,089	124,874
Extra-EU	68,151	84,067	83,876
Developing countries	33,724	42,098	61,614
Top 5 suppliers Developing countries			
China	24,057	30,551	29,292
Indonesia	-	-	13,589
Chile	100	1,956	6,205
Thailand	5,839	5,638	5,344
Brazil	1,263	1,397	4,176

Imports of *pencil lead, black or coloured* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	10,299	12,964	11,953
Extra-EU	5,444	6,692	6,324
Developing countries	2,258	2,658	2,720
Top 5 suppliers Developing countries			
China	1,228	1,250	725
South Korea	303	363	710
Thailand	303	491	540
Indonesia	-	-	257
Brazil	221	256	225

Imports of *pastels and crayons* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	51,645	52,522	49,375
Extra-EU	26,796	29,065	29,925
Developing countries	14,630	18,219	18,701
Top 5 suppliers Developing countries			
China	10,645	13,153	13,054
South Korea	1,133	2,097	2,123
Thailand	577	573	1,301
Malaysia	2,085	2,133	1,253
Indonesia	-	-	368

Imports of *postcards and greeting cards* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	220,021	252,824	242,448
Extra-	EU 78,285	106,084	106,027
Developing countries	41,799	63,313	68,884
Top 5 suppliers Developing countries			
China	36,268	57,387	63,181
Thailand	1,196	1,884	1,583
Indonesia	-	-	1,028
Philippines	2,501	1,729	936
India	269	558	516

Imports of *calendars* by EU member countries, by country of origin, between 1999 and 2001 in € (x 1000)

	1999	2000	2001
Total	97,394	97,873	93,951
Extra-EU	39,262	43,046	41,835
Developing countries	12,535	17,159	17,213
Top 5 suppliers Developing countries			
China	8,957	12,768	11,958
India	206	387	1,078
Indonesia	-	-	908
South Korea	1,069	1,272	876
Malaysia	537	597	757

Imports of *paper products* by EU member countries, from developing countries, between 1999 and 2001 in € (x 1000)

Productgroup	1999	2000	2001
Handmade paper	744	796	2,577
Envelopes	5,053	6,316	9,578
Postsheets and cards	870	1,177	1,862
Correspondence sets	8,148	13,235	14,822
Writing pads	105,259	120,807	121,056
Exercise books	2,037	4,066	15,762
Files, floders and binders	12,835	16,020	16,519
Forms, in sets	264	277	262
Labels	7,218	7,965	8,883
Labels, not printed	1,883	3,383	4,053
Continuous forms	939	1,129	3,139
Office paper	76,920	100,559	169,170
Total	**222,170**	**275,730**	**367,683**

Imports of *writing and drawing instruments* by EU member countries, from developing countries, between 1999 and 2001 in € (x 1000)

Productgroup	1999	2000	2001
Ball-points	49,097	85,545	109,741
Markers and highlighters	24,750	36,663	35,423
Drawing pens	253	407	494
Fountain pens	2,704	5,179	4,458
Propelling pencils	3,423	5,520	5,775
Assorted of instruments	8,496	13,663	14,949
Refills for ball-point pens	984	1,329	1,193
Pen nibs and nib points	856	1,430	1,112
Holders, refills and parts	4,090	4,777	5,278
Total	**94,653**	**154,513**	**178,423**

Imports of *other desk and school supplies* by EU member countries, from developing countries, between 1999 and 2001 in € (x 1000)

Productgroup	1999	2000	2001
Office and school supplies	72,440	115,892	104,866
Erasers	-	-	-
Gummed paper and tape	-	-	-
Sharpeners and paper knives	8,764	13,542	9,971
Filing cabinets and trays	12,314	15,025	13,517
Fittings for binders	13,100	13,189	13,553
Staples	28,813	34,227	35,077
Paper clips	3,371	4,800	6,836
Stamps	4,687	7,643	12,050
Ink-pads	9,230	11,117	10,870
Total	**152,719**	**215,435**	**206,740**

Imports of *artists' materials* by EU member countries, from developing countries, between 1999 and 2001 in € (x 1000)

Productgroup	1999	2000	2001
Artists' colours (assorted)	1,641	1,549	1,504
Artists' colours	7,383	10,304	12,095
Colouring books	3,871	8,279	3,080
Brushes	21,350	28,292	33,019
Pencils	36,962	50,869	53,398
Pencil lead	33,724	42,098	61,614
Crayons	2,258	2,658	2,720
Total	**107,189**	**144,049**	**167,430**

Imports of *cards and calendars* by EU member countries, from developing countries, between 1999 and 2001 in € (x 1000)

Productgroup	1999	2000	2001
Cards	14,630	18,219	18,701
Calendars	41,799	63,313	68,884
Total	**56,429**	**81,532**	**87,585**

EXPORTS

Exports of stationery items, office and school supplies by EU member countries, between 1999 and 2001 in € (x 1000)

Country	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Germany	971,787	690,973	1,662,760	1,132,128	795,766	1,927,894	1,038,975	805,253	1,844,228
France	643,918	307,465	951,383	705,556	317,119	1,022,675	698,841	317,192	1,016,033
UK	462,625	340,492	803,117	545,001	359,472	904,473	489,337	372,377	861,714
Italy	462,921	238,429	701,350	506,100	280,823	786,923	490,392	318,384	808,776
Austria	266,955	180,429	447,384	305,564	198,272	503,836	405,981	198,699	604,680
Belgium	465,989	64,835	530,824	516,336	76,481	592,817	499,148	72,738	571,886
Netherlands	402,090	63,732	465,822	449,216	74,331	523,547	414,425	87,609	502,034
Finland	288,704	97,590	386,294	370,297	120,343	490,640	257,431	99,161	356,592
Sweden	168,588	122,221	290,809	213,296	139,484	352,780	181,196	123,399	304,595
Spain	119,597	65,866	185,463	174,842	75,210	250,052	153,277	85,103	238,380
Denmark	111,158	66,275	177,433	108,416	79,389	187,805	124,042	76,735	200,777
Portugal	56,350	22,483	78,833	80,802	45,517	126,319	15,460	101,346	116,806
Ireland	102,896	31,165	134,061	86,357	22,959	109,316	77,805	15,597	93,402
Greece	9,177	7,903	17,080	10,461	11,968	22,429	5,373	14,042	19,415
Luxembourg	4,232	452	4,684	4,655	297	4,952	7,910	302	8,212
Total	**4,536,987**	**2,300,310**	**6,837,297**	**5,209,027**	**2,597,431**	**7,806,458**	**4,859,593**	**2,687,937**	**7,547,530**

Exports of stationery items, office and school supplies by EU member countries, between 1999 and 2001 in tonnes

Country	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Netherlands	196,228	20,335	216,563	326,568	16,951	343,519	156,294	26,079	182,373
Belgium	210,158	15,063	225,221	188,149	14,755	202,904	182,610	14,632	197,242
Luxembourg	1,678	14	1,820	2,772	48	2,820	1,928	43	1,971
France	300,963	84,669	385,632	300,987	81,168	382,155	316,862	82,723	399,585
Germany	294,783	113,459	408,242	346,953	129,431	476,384	287,020	125,538	412,558
Italy	101,241	54,921	156,162	109,297	63,728	173,025	107,512	76,031	183,543
UK	127,136	39,712	166,848	142,010	37,655	179,665	125,570	35,422	160,992
Ireland	16,348	729	17,077	10,679	579	11,258	13,160	632	13,792
Denmark	24,815	12,486	37,301	24,832	13,849	38,681	31,397	31,567	62,964
Greece	2,580	2,133	4,713	2,640	2,832	5,472	1,769	3,945	5,714
Portugal	61,223	21,921	83,144	77,275	41,799	119,074	6,652	121,737	128,389
Spain	28,143	17,372	45,515	41,928	14,136	56,064	39,485	16,856	56,341
Sweden	170,881	65,975	236,856	214,886	67,940	282,826	159,226	64,434	223,660
Finland	414,487	103,538	518,025	435,584	107,888	543,472	280,493	86,690	367,183
Austria	180,704	94,505	275,209	175,484	90,138	265,622	259,278	85,745	345,023
Total	**2,131,368**	**646,960**	**2,778,328**	**2,400,044**	**682,897**	**3,082,941**	**1,969,256**	**772,074**	**2,741,330**

Exports of *paper products* by the EU member countries , between 1999 and 2001 in € (x 1000)

Productgroup	**1999**			**2000**			**2001**		
	Intra-EU	**Extra-EU**	**Total**	**Intra-EU**	**Extra-EU**	**Total**	**Intra-EU**	**Extra-EU**	**Total**
Handmade paper	7,666	9,941	17,607	7,003	11,731	18,734	4,276	11,000	15,276
Envelopes	294,997	62,905	357,902	362,823	71,448	434,271	358,552	80,163	438,715
Postsheets and cards	4,180	3,988	8,168	4,770	5,489	10,259	3,611	6,865	10,476
Correspondence sets	14,274	14,208	28,482	19,642	17,655	37,297	15,098	16,618	31,716
Writing pads	264,763	116,025	380,788	269,322	128,980	398,302	268,177	138,518	406,695
Exercise books	20,210	18,057	38,267	22,365	21,008	43,373	21,961	24,247	46,208
Files, floders and binders	149,587	65,469	215,056	148,568	69,958	218,526	125,223	70,742	195,965
Forms, in sets	57,653	20,982	78,635	59,330	21,283	80,613	57,140	23,409	80,549
Labels	386,784	257,739	644,523	435,685	279,922	715,607	439,963	290,963	730,926
Labels, not printed	101,070	76,491	177,561	112,784	86,358	199,142	95,167	83,969	179,136
Continuous forms	59,044	25,255	84,299	44,411	34,252	78,663	40,032	27,696	67,728
Office paper	1,124,379	283,827	1,408,206	1,453,959	355,475	1,809,434	1,324,226	403,071	1,727,297
Total	**2,484,607**	**954,887**	**3,439,494**	**2,940,662**	**1,103,559**	**4,044,221**	**2,753,426**	**1,177,261**	**3,930,687**

Exports of *writing and drawing instruments* by the EU member countries, between 1999 and 2001 in € (x 1000)

Productgroup	**1999**			**2000**			**2001**		
	Intra-EU	**Extra-EU**	**Total**	**Intra-EU**	**Extra-EU**	**Total**	**Intra-EU**	**Extra-EU**	**Total**
Ball-points	288,600	242,378	530,978	332,421	265,124	597,545	310,185	270,219	580,404
Markers and highlighters	162,771	88,482	251,253	172,231	102,689	274,920	163,634	94,489	258,123
Drawing pens	9,756	12,173	21,929	7,983	12,696	20,679	3,864	10,828	14,692
Fountain pens	57,164	75,771	132,935	59,649	80,939	140,588	53,665	73,002	126,667
Propelling pencils	23,254	25,546	48,800	22,811	21,267	44,078	24,328	21,184	45,512
Assorted of instruments	35,769	36,071	71,840	38,747	45,308	84,055	34,897	38,986	73,883
Refills for ball-point pens	19,752	43,550	63,302	21,190	31,246	52,436	17,666	30,449	48,115
Pen nibs and nib points	7,779	6,084	13,863	8,644	7,937	16,581	8,678	7,297	15,975
Holders, refills and parts	33,162	56,241	89,403	36,419	59,363	95,782	29,370	56,371	85,741
Total	**638,007**	**586,296**	**1,224,303**	**700,095**	**626,569**	**1,326,664**	**646,287**	**602,825**	**1,249,112**

Exports of *other desk and school supplies* by the EU member countries, between 1999 and 2001in € (x 1000)

Productgroup	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Office and school supplies	458,038	206,787	664,825	498,560	235,822	734,382	472,911	228,367	701,278
Erasers	4,632	4,324	8,956	4,301	4,608	8,909	4,507	5,687	10,194
Gummed paper and tape	211,332	69,460	280,792	230,043	88,104	318,147	218,694	106,511	325,205
Sharpeners and paper knives	13,756	19,605	33,361	14,715	27,018	41,733	12,088	23,642	35,730
Filing cabinets and trays	22,539	17,324	39,863	22,633	21,324	43,957	18,583	21,372	39,955
Fittings for binders	61,336	28,919	90,255	58,345	27,822	86,167	54,806	27,653	82,459
Staples	54,028	44,769	98,797	66,178	49,116	115,294	57,131	47,754	104,885
Paper clips	15,072	7,847	22,919	23,715	8,408	32,123	15,460	8,385	23,845
Stamps	59,306	46,188	105,494	68,418	56,324	124,742	70,092	56,596	126,688
Ink-pads	12,430	7,526	19,956	14,078	9,867	23,945	14,431	9,842	24,273
Total	**912,469**	**452,749**	**1,365,218**	**1,000,986**	**528,413**	**1,529,399**	**938,703**	**535,809**	**1,474,512**

Exports of *artists's materials* by the EU member countries, between 1999 and 2001 in € (x 1000)

Productgroup	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Artists' colours (assorted)	20,810	13,772	34,582	26,386	17,441	43,827	24,295	22,252	46,547
Artists' colours	55,466	40,941	96,407	61,213	52,638	113,851	55,120	54,906	110,026
Colouring books	96,841	21,846	118,687	104,560	25,184	129,744	95,403	37,088	132,491
Brushes	41,868	33,514	75,382	52,331	33,344	85,675	50,353	38,678	89,031
Pencils	46,762	40,956	87,718	50,989	45,330	96,319	51,202	49,851	101,053
Pencil lead	5,573	9,449	15,022	5,678	10,667	16,345	5,124	11,149	16,273
Crayons	22,139	16,298	38,437	24,754	21,002	45,756	23,074	22,433	45,507
Total	**289,459**	**176,776**	**466,235**	**325,911**	**205,606**	**531,517**	**304,571**	**236,357**	**540,928**

Exports of *cards* by the EU member countries, between 1999 and 2001 in € (x 1000)

Productgroup	1999			2000			2001		
	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total	Intra-EU	Extra-EU	Total
Cards	144,801	77,969	222,770	174,735	77,621	252,356	157,549	74,110	231,659
Calendars	67,643	51,634	119,277	66,649	55,670	122,319	58,945	61,582	120,527
Total	**212,444**	**129,603**	**342,047**	**241,384**	**133,291**	**374,675**	**216,494**	**135,692**	**352,186**

APPENDIX 2 STANDARDS ORGANISATIONS

INTERNATIONAL
International Organisation for Standardisation (ISO)
Address: P.O. Box 56, 1211 Geneva 20, Switzerland
Telephone: + 41(0)22 749 0111
Fax: + 41(0)22 733 3430
E-mail: central@isocs.iso.ch
Internet: www.iso.ch

EUROPEAN UNION
Comité Européen de Normalisation (CEN)
European Normalisation Committee
Address: Rue de Stassart 36, 1050 Brussels, Belgium
Telephone: +32(0)2 550 0811
Fax: +32(0)2 550 0819
E-mail: infodesk@cenorm.be
Internet: www.cenorm.be

BELGIUM
Institut Belge de Normalisation (IBN)
Address: Avenue de la Brabançonnelaan 29, B-1000 Brussel, Belgium
Telephone: +32(0)2 738 0111
Fax: +32(0)2 733 4264
E-mail: info@bin.be
Internet: www.ibn.be

FINLAND
Suomen standardisoimisliito r.y. (SFS)
Address: POBox 116, 00241 Helsinki, Finland
Telephone: + 358 (0)9 149 9331
Fax: + 358 (0)9 146 4925
E-mail: sfs@sfs.fi
Internet: www.sfs.fi

FRANCE
Association Française de Normalisation (AFNOR)
Address: 1, Avenue Francis de Pressensé, 93571 Saint-Denis La Plaine Cedex, France
Telephone: + 33 (0)1 4162 8000
Fax : + 33 (0)1 4917 9000
E-mail: norminfo@afnor.fr
Internet: www.afnor.fr

GERMANY
Deutsches Institute für Normung ev (DIN)
Address: Burggrafenstrasse 4-10, 10772 Berlin, Germany
Telephone: + 49 (0)302 6011
Fax: + 49 (0)302 601 1263
Internet: postmaster@din.de
Internet: www.din.de

ITALY
Ente Nazionale Italiano di Unificazione (UN)
Address : Via Battistotti Sassi 11B, 20133 Milano, Italy
Telephone: + 39 (0)2 700 241
Fax: + 39 (0)2 701 061 06
E-mail: uni@uni.com
Internet: www.uni.com

THE NETHERLANDS
Nederlands Normalisatie Instituut (NNI)
Netherlands Normalisation Institute (NNI)
Address: POBox 5059, 2600 GB Delft, The Netherlands
Telephone: +31 (0)15 2690390
Fax: +31 (0)15 2690190
E-mail: info@nni.nl
Internet: www.nni.nl

UNITED KINGDOM
British Standards Institution (BSI)
Address: 389 Chiswick High Road, London W4 4AL, United Kingdom
Telephone: + 44 (0)20 8996 9000
Fax: + 44 (0)20 8996 7400
E-mail: info@bsi-global.com
Internet: www.bsi-global.com

APPENDIX 3 SOURCES OF PRICE INFORMATION

KBM Kantoor Business Magazine, Kantoor&Efficiency, kantoornet.nl
Trade magazines and website for stationery items, office and school supplies

Address:	Pannenstraat 12, 6560 AC Groesbeek, The Netherlands
Telephone:	+31 (0)24 3978081
Fax:	+31 (0)24 3976071
E-mail:	kbm@kantoornet.nl
Internet:	www.kantoornet.nl

Kantoorvak/Kantoorvak Lijstenboek/ Uitgeverij Multivak vof
Trade magazine, annual book and website for stationery items, office and school supplies

Address:	POBox 239, 1740 AE Schagen, The Netherlands
Telephone:	+31 (0)224 552260
Fax:	+31 (0)224 552290
E-mail:	info@kantoorvak.nl
Internet:	www.kantoorvak.nl

APPENDIX 4 TRADE ORGANISATIONS

AKO BV
Franchise/Retail organisation
Address: L. Ansinghstraat 163, 1072 RG Amsterdam, The Netherlands
Telephone: +31 (0)20 5721500

ALL ART
Purchasing organisation of retailers in artists' materials
Address: Fabianusstraat 7, 7333 BB Apeldoorn, The Netherlands
Telephone: +31 (0)55 5413714
Fax: +31 (0)55 5413714

Bruna
Organisation of franchisers/retailers
Address: POBox 30450, 3503 AG Utrecht, The Netherlands
Internet: www.bruna.nl

Quantore (formerly CIB)
Central buying group
Addres: POBox 286, 5201 AG Den Bosch, The Netherlands
Telephone: +31 (0)73 6427500
Fax: +31 (0)73 6427890
E-mail: cib@cib.nl
Internet: www.cib.nl

Gras Groep
Graphic & Art Supply Stores
Address: POBox 107, 5320 AC HEDEL, The Netherlands
Telephone: +31 73 5996262

Hameco
Organisation of independent retailers
Address: POBox 64652, 2506 CA The Hague, The Netherlands
Telephone: +31 (0)70 3689780
Fax: +31 (0)70 3685037
E-mail: hameco@planet.nl

The Read Shop
Franchise organisation
Address: POBox 66, 3620 AB Breukelen, The Netherlands
Telephone: + 31 (0)346 280960
Fax: + 31 (0)346 280961
Internet: www.readshop.nl

Soennecken eG
Central buying group
Address: Soennecken Platz, D-51491 Overath, Germany
Telephone: +49 (0)2206 6070
Fax: +49 (0)2206 607199

Quantore
Central buying group
Address: POBox 286, 5201 AG 's-Hertogenbosch, The Netherlands
Telephone: +31 (0)73 642 7500
Fax: +31 (0)73 642 7890
E-mail: info@quantore.nl
Internet: www.quantore.nl

APPENDIX 5 TRADE FAIR ORGANISERS

BELGIUM

Bureau

Address: Fegropa, Thirylaan 24 bus 1, B-1200 Brussels, Belgium
Telephone: + 32 (0)27627183
Fax: + 32 (0)27629434

Seaside Show

Address: Mediacenter, Troonstraat 66, B-8400 Oostende, Belgium
Telephone: + 32 (0)59556611
Fax: + 32 (0)59501650

FRANCE

Maison & Objet

Address: Paris Nord Villepinte, SAFI, 4 impasse Roux, 75017 Paris, France
Telephone : + 33 (0)144290200
Fax : + 33 (0)144290201
Internet: www.maison-objet.com

GERMANY

Paperworld

Address: Messe Frankfurt Service GmbH, Ludwig Erhard Anlage 1, 60327 Frankfurt am Main, Germany
Telephone: + 49 (0)69757568
Fax: + 49 (0)6975756759/57
E-mail: info@messefrankfurt.com
Internet: www.messefrankfurt.com

GREECE

Office World

Address: Europartners Ltd, 101 Syngrou Avenue, 117 45 Athens, Greece
Telephone: + 30 (0)19221254/14335
Fax: + 30 (0)19221589
E-mail: europart@hol.gr
Internet : www.europartners.gr

ITALY

Chibi & Cart

Address: Fiera Milano International Spa, Largo Domodossola 1, 20145 Milano, Italy
Telephone: + 39 (0)02485501
Fax: + 39 (0)024980199
E-mail: chibicart@fmi.it
Internet: www.fmi.it

Big Buyer

Address: Edinova, Piazza Udine 8, 20132 Milano, Italy
Telephone: + 39 (0)022158021
Fax: + 39 (0)022158023

THE NETHERLANDS

Officeworld

Address: Boleka, POBox 29822, 2502 LV The Hague, The Netherlands
Telephone: + 31 (0)703546811
Fax: + 31 (0)703512777
E-mail: info@boleka.nl
Internet: www.officeworld2001.nl

Trade Mart Utrecht

Address: Jaarbeurs Exhibitions & Media, Jaarbeursplein, POBox 8500, 3503 RM Utrecht, The Netherlands
Telephone: + 31 (0)302955911
Fax: + 31 (0)302955347
E-mail: info@jaarbeursutrecht.nl
Internet: www.jaarbeursutrecht.nl

JAPAN

ISOT

Address: All Japan Stationery Association - Reed Exhibitions, 18 F Shinjuku-Nomura Bldg, 1-26-2 Nishi-Shinjuku, Shinjuku-ku, Tokyo 163 0570, Japan
Telephone: + 81 (0)333498505
Fax: + 81 (0)333457929
E-mail: isot@reedexpo.co.jp
Internet: www.reedexpo.co.jp/isot/

PORTUGAL

Europaper

Address: Feira Internacional de Lisboa, Rua do Bojador, Parque das Necoes, 1998-010 Lisboa, Portugal
Telephone: + 351 (0)218921500
Fax: + 351 (0)218921555
E-mail: camatias@aip.pt

SPAIN

Manual

Address: Ifema Feria, Parque Ferial Juan Carlos 1, Apdo de Correos 67067, 28042 Madrid, Spain
Telephone: + 34 (0)917225000
Fax: + 34 (0)917225801
E-mail: infoifema@ifema.es
Internet: www.ifema.es

UNITED KINGDOM

International Spring Fair

Address:	Trade Promotion Service Ltd, 19th Floor, Leon House, 233 Hight Street, Croydon, Surrey, CR0 9XT, United Kingdom
Telephone:	+ 44 (0)2082775844
Fax:	+ 44 (0)2082775887
E-mail:	info@tps.emap.co.uk
Internet:	www.springfair.com

APPENDIX 6 TRADE PRESS

BELGIUM
P&B Papeterie & Bureau
Address: Wildert 74, 2170 Antwerpen, Belgium
Telephone: + 32 (0)364 71234
Fax: + 32 (0)364 53202
E-mail: marcom@pandora.be

FRANCE
Le Papetier de France
Address: 35, Avenue de l'Opéra, 75002 Paris, France
Telephone : + 33 (0)142 604010
Fax : + 33 (0)490 882849
E-mail : info@papetierdefrance.com
Internet: www.papetierdefrance.com

PNP
Profession Nouveau Papetier
Address: 16, Rue Saint-Fiacre, 75002 Paris, France
Telephone: + 33 (0)142 365102
Fax: + 33 (0)142 360462
E-mail: eltapap@club-internet.fr

GERMANY
Office & Paper
Address: Göller Verlag GmbH, Aschmattsrasse 8, 76532 Baden Baden, Germany
Telephone: + 49 (0)722 1502214
Fax: + 49 (0) 7221502222
E-mail: pietro@giarizzo.de
Internet: www.officeandpaper.de

BOSS
Magazin für die PBS/BBO-Branche
Address: bit-Verlag Weinbrenner GmbH & Co. KG, Fasanenweg 18, D-70771 Leinfelden-Echterdingen, Germany
Telephone: + 49 (0)711 75910
Fax: + 49 (0)7117591368
E-mail info@bitverlag.de
Internet www.bitverlag.de

THE NETHERLANDS
KantoorVak
Address: Postbus 239, 1740 AE Schagen, The Netherlands
Telephone: + 31 (0)224552260
Fax: + 31 (0)224552290
E-mail: kamps@kantoorvak.nl
Internet: www.kantoorvak.nl

KBM, Kantoor Business Magazine
Address: Districomm BV, PO Box 134, 6560 AC Groesbeek, The Netherlands
Telephone: + 31 (0)243978081
Fax: + 31 (0)243976071
E-mail: kbm@kantoornet.nl
Internet: www.kantoornet.nl

UNITED KINGDOM
Stationery Trade News
Address: Brookmead House, 8 Thorney Leys Business Park, Witney, Oxon OX8 7GE, United Kingdom
Telephone: + 44 (0)1993775545
Fax: + 44 (0)1993778884
E-mail: adm.j@tmoffice.co.uk

Stationery Trade Review
Address: Nexus House, Azalea Drive, Swanley, Kent BR8 8HU, United Kingdom
Telephone + 44 (0)1322660070
Fax: + 44 (0)1322616311
E-mail: alison.bowie@nexusmedia.com

APPENDIX 7 OTHER USEFUL ADDRESSES

BELGIUM

Association of European Chambers of Commerce and Industry

Address: Rue Archimède 5, 1040 Brussels, Belgium
Telephone: + 32 (0)2 231 0715
Fax: + 32 (0)2 230 0038
E-mail: eurocham@mail.interpac.be
Internet: www.ecu-notes.org/atoz997/eurocham.html

Commission of the European Communities

Contact point EU ECO-label (DG XI-A-2)
Address: Rue de la Loi 200, 1049 Brussels, Belgium
Telephone: + 32 (0)2 2990344
Fax: + 32 (0)2 2990313
Internet: ecolabel@dg11.cec.be

GERMANY

Federal Statistical Office

Address: Gustav-Stresemann-Ring 11, D-65189 Wiesbaden, Germany
Telephone: + 49 (0)611 752 405
Fax: + 49 (0)611 753 330
E-mail: info@statistik-bund.de
Internet: www.statistik-bund.de/e-home.htm

THE NETHERLANDS

AccessGuide

The CBI's database for non-tariff barriers
Address: POBox 30009, 3001 DA Rotterdam, The Netherlands
Telephone: +31 (0)10 2013434
Fax: +31 (0)10 4114081
E-mail: accessguide@cbi.nl
Internet: www.cbi.nl/accessguide

Stichting Milieukeur

The Netherlands Competent Body for the EU Eco label and for the Dutch Eco label
Address: POBox 17186, 2502 KD The Hague, The Netherlands
Telephone: +31 (0)70 3586300
Telefax: +31 (0)70 3502517
E-mail: milieukeur@milieukeur.nl
Internet: www.milieukeur.nl

Boleka

Dutch Association of importers and wholesalers of stationery items, office and school supplies
Address: POBox 29822, 2502 LV The Hague, The Netherlands
Telephone: +31 (0)70 3384656
Fax: +31 (0)70 3512777
E-mail: boleka@verbondgroothandel.nl
Internet: www.boleka.nl

Chamber of Commerce & Industry for Rotterdam

Address: Beursplein 37, 3011 AA Rotterdam, The Netherlands
Telephone: +31 (0)10 4055036
Fax: +31 (0)10 4145754
Internet: www.kvk.nl

Customs Telephone service

Contact Point for EU import tariffs and documents requirement
Telephone: +31 (0)45 5743031
Fax: +31 (0)45 5716415
E-mail: douanetelefoon@douane.nl

APPENDIX 8 LIST OF DEVELOPING COUNTRIES

Please note that the OECD list of developing countries, as applied in this market survey, may include countries that are usually not considered as developing countries.

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Azerbaijan
Bahrain
Bangladesh
Barbados
Belize
Benin
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso
Burundi
Cambodia
Cameroon
Cape Verde
Central African rep.
Chad
Chile
China
Colombia
Comoros
Congo
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea
Eritrea
Ethiopia
Fiji
Gabon
Gambia
Georgia
Gabon
Ghana
Grenada
Guatemala
Guinea
Guinea-Bissau
Guyana
Haiti
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, rep of
Kyrghyz Rep.
Laos
Lebanon
Lesotho
Liberia
Macedonia
Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Marshall Islands
Mauritania
Mauritius
Mayotte
Mexico
Micronesia, Fed. States
Moldova
Mongolia
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nepal
Nicaragua
Niger
Nigeria
Niue
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New
Peru
Philippines
Rwanda
São Tomé & Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
St. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Grenadines
Sudan
Surinam
Swaziland
Syria
Tajikistan
Tanzania
Thailand
Timor Togo
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu
Uganda
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Wallis & Futuna
Western Samoa
Yemen
Yugoslavia, Fed. Rep.
Zaire
Zambia
Zimbabwe

January 2000

APPENDIX 9 LIST OF DUTCH IMPORTERS AND THE MOST IMPORTANT EU IMPORTERS

THE NETHERLANDS

AGENTS

Dena
Agent, importer/wholesaler of stationery items and art supplies
Address: POBox 3152, 3760 DD Soest, The Netherlands
Telephone: + 31 (0)356025560
Fax: + 31 (0)356025624
E-mail: denabvagencies@wanadoo.nl

Europel Office Products
Agent, importer/wholesaler of stationery items, office- and computer supplies
Address: Zandweistraat 12, 4181 CG Waardenburg, The Netherlands
Telephone: + 31 (0)418652800
Fax: + 31 (0)418652908
E-mail: info@europel.nl

WHOLESALERS

ABM
Importer/wholesaler of office- and computer supplies
Address: POBox 462,3700 AL Zeist, The Netherlands
Telephone: + 31 (0)306936900
Fax: + 31 (0)306936999
Internet: www.argo.nl

ACI Adam
Importer/wholesaler of computer supplies
Address: Punterweg 41, 6222 NW Maastricht, The Netherlands
Telephone: + 31 (0)433525100
Fax: + 31 (0)433525115
E-mail: aciadam@xs4all.nl

Acco Benelux
Importer/wholesaler of office- and computer supplies
Address: Peppelkade 64, 3992 AK Houten, The Netherlands
Telephone: + 31 (0)306346060
Fax: + 31 (0)306346070
Internet: info@accobenelux.nl

Argo Business Machines BV
Importer/wholesaler of office- and computer supplies
Address: POBox 462, 3700 AL Zeist, The Netherlands
Telephone: + 31 (0)306936933
Fax: + 31 (0)306936931
Internet: www.argo.nl

Blana
Importer/wholesaler of stationery and office supplies
Address: POBox 9, 1135 ZG Edam, The Netherlands
Telephone: + 31 (0)299390093
Fax: + 31 (0)299390080
E-mail: info@blana.com

3D Tradelink BV
Importer/wholesaler of office and computer supplies
Address: Ind.site. Hoogeind 7228, Minervum 1313, 4817 ZJ Breda, The Netherlands
Telephone: + 31 (0)765792500
Fax: + 31 (0)765792501
Internet: www.3dtradelink.nl

Dema
Importer and wholesaler of computer- and office supplies
Address: POBox 515, 6600 AM Wijchen, The Netherlands
Telephone: + 31 (0)243722320
Fax: + 31 (0)243722322
Internet: www.demasupplies.nl

Despec
Wholesaler and importer of computer and office supplies
Address: POBox 468, 8600 AL Sneek, The Netherlands
Telephone: + 31 (0)515486200
Fax: + 31 (0)515426158
E-mail: info@despec.nl

Smead Europe BV
Manufacturer, importer and wholesaler of office and computer supplies
Address: Techniekweg 1, 9601 MD Hoogezand, The Netherlands
Telephone: + 31 (0)598329911
Fax: + 31 (0)598326480

WHOLESALERS, PAPER AND PAPER PRODUCTS, SCHOOL SUPPLIES AND WRITING INSTRUMENTS

Albracht Papier
Importer and wholesaler of paper products and social stationery items
Address: POBox 140, 3880 AC Putten, The Netherlands
Telephone: + 31 (0)341352009
Fax: + 31 (0)341358526
Internet: www.albrachtpapier.nl

Alpha International
Wholesaler of paper products
Address: POBox 140, 6500 AC Nijmegen, The Netherlands
Telephone: + 31 (0)243603333
Fax: + 31 (0)243606777
Internet: www.alpha-international.nl

Amco Enveloppen
Manufacturer and wholesaler of paper products
Address: POBox 9401, 3506 GK Utrecht, The Netherlands
Telephone: + 31 (0)302634444
Fax: + 31 (0)302618104
E-mail: info@amcobv.nl

Antang Pickup BV
Importer and wholesaler of paper products and stationery items
Address: POBox 140, 7700 AC Dedemsvaart, The Netherlands
Telephone: + 31 (0)523628800
Fax: + 31 (0)523616062/628607
E-mail: Info@pickup.nl

Aurora Productions
Manufacturer and wholesaler of paper products
Address: POBox 9, 1723 ZG Noord Scharwoude, The Netherlands
Telephone: + 31 (0)226321143
Fax: + 31 (0)226340628
Internet: www.aurora-productions.com

Avery Office Productions Benelux
Manufacturer and wholesaler, paper products, computersupplies
Address: POBox 9926, 3506 BX Utrecht, The Netherlands
Telephone: + 31 (0)302632121
Fax: + 31 (0)302632129
Internet: www.avery.nl

Bura BV
Importer/wholesaler of writing instruments and office supplies
Address: POBox 3043, 2220 CA Katwijk, The Netherlands
Telephone: + 31 (0)714060400
Fax: + 31 (0)714032807
Internet: www.bura.nl

ColArt BV
Manufacturer and wholesaler of paper products and artists' materials
Address: Vlierbaan 13, 2908 LR Capelle a/d IJssel, The Netherlands
Telephone: + 31 (0)104580311
Fax: + 31 (0)104580610
E-mail: info@colart.nl

Van Cooth & Partners BV
Manufacturer and wholesaler of paper products
Address: Vlotbrugweg 17, 1332 AC Almere
Telephone: + 31 (0)365402528
Fax: + 31 (0)365402782
E-mail: info@cooth-partners.nl

Cortina Papier
Manufacturer and wholesaler of paper products
Address: Reestraat 22, 1016 DN Amsterdam
Telephone: + 31 (0)206236676
Fax: + 31 (0)206258698

Enfa BV
Manufacturer and wholesaler of paper products
Address: POBox 12, 5900 AA Venlo, The Netherlands
Telephone: + 31 (0)773599777
Fax: + 31 (0)773599701
E-mail: enfa@enfa.com

WHOLESALERS (PUBLISHERS CARDS AND CALENDARS)

Artimedes BV
Address: POBox 210, 6710 BE Ede, The Netherlands
Telephone: + 31 (0)318621768
Fax: + 31 (0)318631351

Art Unlimited
Address: Overtoom 33, 1054 HB Amsterdam, The Netherlands
Telephone: + 31 (0)206851011
Fax: + 31 (0)206128057
Internet: www.artunlimited.com

Barth Larson Juhl
Address: POBox 83, 5280 Boxtel, The Netherlands
Telephone + 31 (0)411661166
Fax: + 31 (0)411683935
Internet: www.larson-juhl.nl

Benotti International
Address: Ugchelseweg 195a, 7339 CH Apeldoorn, The Netherlands
Telephone: + 31 (0)555428505
Fax: + 31 (0)555409721

Van den Berg Collectie
Address: Luchtenburgstraat 5, 4158 DA Deil, The Netherlands
Telephone: + 31 (0)345651765
Fax: + 31 (0)345652396

Biri/Kijkkader
Address: POBox 30, 1420 AA Uithoorn, The Netherlands
Telephone: + 31 (0)297237650
Fax: + 31 (0)297347312
Internet: www.biri.nl

The Cardclub
Address: J. van Lennepplein 8, 3705 SZ Zeist, The Netherlands
Telephone: + 31 (0)306954148
Fax: + 31 (0)306963585

Cartesse
Address: POBox 3187, 5203 DD ‘s-Hertogenbosch, The Netherlands
Telephone: + 31 (0)736401800
Fax: + 31 (0)736443981
E-mail: info@cartesse.nl

Cat Trading
Address: Hogedijk 23, 1145 PN Katwoude
Telephone: + 31 (0)299653669
Fax: + 31 (0)299656152
E-mail: cattrading@zonnet.nl

Comello Calendars Cards
Address: Marconistraat 111, 2809 PG Gouda, The Netherlands
Telephone: + 31 (0)182547666
Fax: + 31 (0)182547667
E-mail: info@comello.nl

THE MOST IMPORTANT EU IMPORTERS

BELGIUM

Burotex (SA)
Importer, wholesaler
Address: Tollaan 87, 1932 Sint Stevens Woluwe
Telephone: + 32 (0)27209560
Fax: + 32 (0)27200609
Internet: www.spec-burotex.com

Mondial Trading
Importer, wholesaler
Address: Bd. du Souverain 348/55, 1160 Brussels
Telephone: + 32 (0)26601408
Fax: + 32 (0)26757177

Timmermans
Importer, wholesaler
Address: Europalaan 69, 9800 Deinze
Telephone: + 32 (0)93810505
Fax: + 32 (0)93810535
Internet: www.timmermansnet.com

DENMARK

Bantex A/S
Address: Noglegardsvei 1, 3540 Lynge
Telephone: + 45 (0)48165000
Fax: + 45 (0)48165250
Internet: www.bantex.com

Nordfrim
Address: 5450 Otterup
Telephone: + 45 (0)64821256
Fax: + 45 (0)64821056

Kontor X Pressen
Address: Sydhavns Plads 12, 2450 Kobenhavn Sv
Telephone: + 45 (0)33256655
Fax: + 45 (0)33256656

Lykimex Denmark (Aps)
Address: Noerredamsvej, Stenild, 9500 Hobro
Telephone: + 45 (0)98548054
Fax: + 45 (0)98548402

FINLAND

Belton Oy
Address: Nuijamäki 2, 02630 Espoo
Telephone: + 358 (0)95259000
Fax: + 358 (0)923393

Kone Ponkilainen Oy
Address: Jt. Rantakatu 54 E 78, 20810 Turku
Telephone: + 358 (0)22517956
Fax: + 358 (0)22517017

Rader Oy
Address: Välitalontie 71, 00660 Helsinki
Telephone: + 358 (0)97771383
Fax: + 358 (0)97287576

FRANCE

GMT Imports
Address: 26 Rue des Frères Chausson, 92601 Asnières
Telephone: + 33 (0)147912660
Fax: + 33 (0)147930198

Hamelin (Pap)
Address: Rte de Lion, BP 6016, 14061 Caen Cedex
Telephone: + 33 (0)231477777
Fax: + 33 (0)231477773
Internet: www.groupehamelin.com

KT Diffusion
Address: 15 Rue de Voisins, BP 19, 78431 Louveciennes Cedex
Telephone: + 33 (0)139184492
Fax: + 33 (0)139181080

Locau International
Address: ZI Racine, BP 31, 63650 La Monnerie
Telephone: + 33 (0)473514006
Fax: + 33 (0)473514435
Internet: www.locau-international.com

Noblet Distribution
Address: 1 Bd. Ch. De Gaulle, 92707 Colombes Cedax
Telephone: + 33 (0)147604040
Fax: + 33 (0)147604030
Internet: www.noblet.fr

GERMANY

Baier & Schneider GmbH & Co.
Address: Wollhausstr. 60/62, 74072 Heilbronn
Telephone: + 49 (0)71318860
Fax: + 49 (0)71318862
Internet: www.brunnen.de

Branion GmbH
Address: Soennecken Platz, 51491 Overath
Telephone: + 49 (0)22066070-0
Fax: + 49 (0)2206607199

HIS Schreibgeräte GmbH
Address: In der Seife 3/7, 64711 Erbach Lauerbach
Telephone: + 49 (0)60629409-0
Fax: + 49 (0)6062940999

Idea World
Address: Max Planck Str. 5, 27283 Verden/Aller
Telephone: + 49 (0)42319538-0
Fax: + 49 (0)4231953838
Internet: www.idea-products.com

Laco Office Products Finke GmbH
Address: POBox 1108, 27383 Sottrum
Telephone: + 49 (0)4264830814
Fax: + 49 (0)4264830826

Panodia GmbH
Address: Justus von Liebig Str. 19, 63128 Dietzenbach
Telephone: + 49 (0)607442097
Fax: + 49 (0)607442028

Schneider & Söhne Produkta GmbH & Co.
Address: Gehrnstrasse 3/5, 76275 Ettlingen
Telephone: + 49 (0)724373497
Fax: + 49 (0)724373829
Internet: www.skyworld.de

GREECE

Diakakis
Address: 2, Diovounioti Str., 153 51 Pallini, Attiki Hellas, Athens
Telephone: + 30 (0)2106669522
Fax: + 30 (0)2106665791
E-mail: diakais@diakais.gr

Gattegno Graphic
Address: 188 Piraeus Av., 177 88 Athens
Telephone: + 30 (0)13471045
Fax: + 30 (0)13460353

SBK Hellas
Address: 42 Aishylou Str., 10554 Athens
Telephone: + 30 (0)13241235/3313211
Fax: + 30 (0)13211869

Infolinc Supplies Ltd
Address: Mandilara 11 St, 18233 Rentis
Telephone: + 30 (0)14832476
Fax: + 30 (0)14813377

S. Makri & Co
Address: 47 Politehniou Str., 54625 Thessalonikh
Telephone: + 30 (0)31553665
Fax: + 30 (0)31553665

School Bags & Stationery
Address: Paxos S.A. 120 Orfeos Str., 11855 Athens
Telephone: + 30 (0)13420531
Fax: + 30 (0)13420532

S.G. Sophianopoulos & Son
Address: POBox 8190, 10010 Athens
Telephone: + 30 (0)15239854
Fax: + 30 (0)15232979

ITALY

Eco (Srl) Office Supplies
Address: Via C. Miola 55, 21047 Saronno
Telephone: + 39 (0)296304100
Fax: + 39 (0)296701766
Internet: www.ecosaronno.com

Etafelt (Srl)
Address: Via Umbria 23, 10099 S. Mauro Torinese
Telephone: + 39 (0)112236881
Fax: + 39 (0)112236933
Internet: www.fibracolor.it

Forma Italiana
Address: Via Fermi 20, 20090 Assago
Telephone: + 39 (0)245706100
Fax: + 39 (0)245703177

Mondial Lus (Spa)
Address: Via Manzoni 4, 21047 Saronno
Telephone: + 39 (0)29602445
Fax: + 39 (0)29605340
Internet: www.vol.it/igp/mondiallus

PBS Euro Service (Srl)
Address: Via Brennero 4 C,
38010 S. Michelle all’Adiete
Telephone: + 39 (0)461651290
Fax: + 39 (0)461651299

NORWAY

Nordsk Kontorservice (AS)
Address: 6400 Molde
Telephone: + 47 (0)71216850
Fax: + 47 (0)71215785

Olsen Mittet Chr. (AS)
Address: Stanseveien 31, POBox 74, Kalbakken,
0901 Oslo
Telephone: + 47 (0)22164910
Fax: + 47 (0)22167789

Rich Andvord Grafisk (AS)
Address: POBox 243, Alnabru, 0614 Oslo
Telephone: + 47 (0)22726400
Fax: + 47 (0)22656966

PORTUGAL

Enerre Lda
Address: Rua do Sande 67, 1200 Lisboa
Telephone: + 351 (0)213976629
Fax: + 351 (0)213960408

CATM Lda
Address: Rua Almeida Carrett 19A, Vale Milhacos,
2855 406 Corroios
Telephone: + 351 (0)212551741
Fax: + 351 (0)212535712

Olmar Fernando Gomes de Oliveira Lda
Address: Rua Bartolomeu Dias, Apartado 85,
3701954 S. Joao da Madeira
Telephone: + 351 (0)256880390
Fax: + 351 (0)256881500
Internet: www.olmar-pajory.com

Silvilor Lda
Address: ZI, S. Romao do Neiva,
4900 Viana do Castelo
Telephone: + 351 (0)258331207
Fax: + 351 (0)258331208

Reymon Lda
Address: Qta. Do Lamas, Casal dos Moinhos Lote 5 R/c, Estrada da Paia, 1675 Pontinha
Telephone: + 351 (0)214788710
Fax: + 351 (0)214788719

SPAIN

Apli Paper (SA)
Address: Avgda. Arraona 120/124, Centre Industrial Santiga, 0821- Barberà del Vallès
Telephone: + 34 (0)937479100
Fax: + 34 (0)937184031
Internet: www.apli.com

Arge Commercial (SA)
Address: Cavanilles 11/13, 28007 Madrid
Telephone: + 34 (0)915016705
Fax: + 34 (0)915017020

Blas Dasi (SL)
Address: Ciudad Real 41, 46930 Quart de Poblet
Telephone: + 34 (0)961548519
Fax: + 34 (0)961521938

Informatica y Material de Organizacion (SA)
Address: Carretera del Mig 129, 08907 Hospitalet
Telephone: + 34 (0)932631100
Fax: + 34 (0)932633309

Set Prat Paper Distribucions (SA)
Address: C/ Ramon de Trinxeria 8, Pol. Ind. El Pla, 08980 S. Feliu de Llobregat
Telephone: + 34 (0)936859700
Fax: + 34 (0)936859017

SWEDEN

Esselte Dymo (AB)
Address: Svetsarvägen 20, 17127 Solna
Telephone: + 46 (0)87576542
Fax: + 46 (0)87576455

NCP Konvertering (AB)
Address: POBox 1111, 43623 Askim
Telephone: + 46 (0)31490350
Fax: + 46 (0)31478865

Prodako
Address: POBox 7203, 18317 Täby
Telephone: + 46 (0)86301150
Fax: + 46 (0)86300222

Tenex Corporation
Address: Eskilsholmsgatan 5, 506 36 Boras
Telephone: + 46 (0)33228725
Fax: + 46 (0)33416801
E-mail: bergenren@tenexcorp.com

SWITZERLAND

Baumgartner Papiers (SA)
Address: Rue de la Vernie 12, POBox 195, 1001 Lausanne
Telephone: + 41 (0)216351511
Fax: + 41 (0)216351560
Internet: www.baumgartnerpapiers.ch

GOP Switzerland (AG)
Address: Bahnhofstr. 3, POBox 5436, Würenlas
Telephone: + 41 (0)564242233
Fax: + 41 (0)564243331

Ocotex (AG)
Address: Holtzhäusernstr. 43, 6343 Rotkrenz
Telephone: + 41 (0)7905464
Fax: + 41 (0)7905466

Vorasane Distribution
Address: 14 B, Rue des Cordiers, 1207 Genève
Telephone: + 41 (0)227000949
Fax: + 41 (0)227866636

Waser & Co.
Address: Erlenwiesenstrasse 2, 8604 Volketswil
Telephone: + 41 (0)19474111
Fax: + 41 (0)19474250
Internet: www.waser.ch

XperT (AG)
Address: Netzibodenstr. 23 D, Industri N, 4133 Pratteln
Telephone: + 41 (0)618130813
Fax: + 41 (0)618130815

UNITED KINGDOM

GHS Office Media
Address: 28 Berechurch Road, Essex, CO2 7QH Colchester
Telephone: + 44 (0)1206760760
Fax: + 44 (0)1922762626

Jakar International Ltd
Address: Hillside House, 2/6 Friern Park,
N12 9BX London
Telephone: + 44 (0)2084456376
Fax: + 44 (0)2084452714

JB Agencies
Address: 2 Quintilis, Roman Hill Estate, Berkshire
RG12 7QQ Bracknell
Telephone: + 44 (0)1344896577
Fax: + 44 (0)1344896577

Kingfield Wholesale Office Supplies Ltd
Address: Orgreave PI. Kaye House, South Yorkshire.
S13 9LU Sheffield
Telephone: + 44 (0)1142548080
Fax: + 44 (0)1142693126

South Thames Wholesale Stationers
Address: 56A Ferrers Road, Streatham, SW16 London
Telephone: + 44 (0)2086779348
Fax: + 44 (0)2086779144

South Trading Ltd
Address: 90 Belsi Lane, NW3 5BE London
Telephone: + 44 (0)2074317922
Fax: + 44 (0)2074314535
Internet: www.south-trading.com

APPENDIX 10 USEFUL WEBSITES

http://www.kantoornet.nl
This website presents a lot of stationery-related news items, events, fairs and an agenda. Kantoornet.nl is part of the publishing-firm Magenta Communicatieprojecten BV, Groesbeek, The Netherlands.
(Language: Dutch)

http://www.kantoorvak.nl
Kantoorvak.nl is the website that belongs to the monthly edition KantoorVak of the publishing firm Multivak. The website presents stationery-related news items, summaries of articles from the printed edition and an agenda.
(Language: Dutch. Each printed edition of KantoorVak contains a summary of the topics in English).

http://www.novaka.nl
Novaka is the official Dutch organisation for consumer- and business-orientated retailers in stationery items, office and school supplies. This website presents product information and official information for members.
(Language: Dutch)

CBI: YOUR EUROPEAN PARTNER FOR THE EUROPEAN MARKET

The CBI (Centre for the Promotion of Imports from developing countries) is an agency of the Dutch Ministry of Foreign Affairs. The CBI was established in 1971. The CBI's mission is to contribute to the economic development of developing countries by strengthening the competitiveness of companies from these countries on the EU market. The CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities.

CBI offers various programmes and services to its target groups:

Market information
A wide variety of tools to keep exporters and Business Support Organisations (BSOs) in developing countries in step with the very latest development on the EU market.
These include market surveys and strategic marketing guides for more than 40 product groups, manuals on export planning and other topics, fashion and interior forecasts and the CBI News Bulletin, a bi-monthly magazine. This information can also be obtained from our website at www.cbi.nl For all information on non-tariff trade barriers in the EU CBI has a special database, AccessGuide, at www.cbi.nl/accessguide
And finally CBI' s Business Centre is offering free office facilities, including telephones, computers, internet and copiers for eligible exporters and BSOs. Market reports, international trade magazines, cd-roms and much more can be consulted in the information section of the business centre.

Company matching
The company matching programme links well-versed suppliers in developing countries to reliable importing companies in the EU and vice versa. The online matching database contains profiles of hundreds of CBI-audited and assisted exporters in developing countries that are ready to enter into various forms of business relationships with companies in the EU, as well as many EU companies interested in importing or other forms of partnerships such as subcontracting or private labelling.

Export development programmes (EDPs)
EDPs are designed to assist entrepreneurs in developing countries in entering and succeeding on the EU market and/or in consolidating or expanding their existing market share. Selected participants receive individual support over a number of years by means of on site consultancy, training schemes, trade fair participation, business-to-business activities and general export market entry support. Key elements usually include technical assistance in fields such as product adaptation, improving production, implementing regulations and standards and export marketing and management assistance.

Training programmes
Training programmes for exporters and BSOs on, among others, general export marketing and management; trade promotion; management of international trade fair participations and developing client-oriented market information systems. The duration of the training programmes vary between two days and two weeks and are organized in Rotterdam or on location in developing countries.

BSO development programme
Institutional support for capacity building for selected business support organisations.
The programme is tailored to the specific needs of participating BSOs and can include train-the-trainer assistance, market information systems support and staff training. CBI's role is advisory and facilitative.

Please write to us in English, the working language of the CBI.

Centre for the Promotion of Imports from developing countries
Centrum tot Bevordering van de Import uit de ontwikkelingslanden

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Fax +31 (0) 10 411 40 81
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WTC-Beursbuilding, 5th Floor
37 Beursplein, Rotterdam, The Netherlands.

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