CBI MARKET SURVEY

THE STATIONERY, OFFICE AND SCHOOL SUPPLIES MARKET IN THE NORDIC COUNTRIES

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Report summary
This CBI market survey discusses, amongst other things, the following highlights for the stationery, office and school supplies market in the Nordic countries (Sweden, Finland, Denmark):

- The Nordic countries market accounted for 9% of the total stationery consumption of the reviewed countries in 2005. Compared to the other researched markets, Nordic countries (Denmark, Finland, and Sweden) were one of the medium markets in Europe in 2005, when their total consumption amounted to € 1,420 million.
- In absolute value the estimated total production of the Nordic stationery market for 2004 was € 1,129 million (including Cases & Satchels and Greeting cards). In comparison to the previous years, the overall production is strongly declining.
- Total imports into the Nordic countries in value and volume were respectively € 698 million and 196,608.6 tonnes in 2005. In the same year, Nordic countries took 7% of the total EU stationery imports and were one of the medium importers in the EU.
- For the year 2005, the percentage of imports into the Nordic countries coming from the developing countries was more than 12%. By comparison, this percentage was 9.8% in 2003. Leading suppliers in 2005 were: *China (8.9%), India (0.3%), Thailand (0.25%), Turkey (0.16%), Malaysia (0.19%).*

This survey provides exporters of stationery[1] with sector-specific market information related to gaining access to the Nordic region[2]. By focusing on a specific region, this survey provides additional information, complementary to the more general information and data provided in the CBI market survey *'The stationery, office and school supplies market in the EU' (2006),* which covers the EU in general. That survey also contains an overview and explanation of the selected products dealt with, some general remarks on the statistics used as well as information on other available documents for this sector. It can be downloaded from http://www.cbi.nl/marketinfo.

1. Market description: consumption and production

Consumption

- The total consumption of stationery in 2005 in the Nordic countries (Denmark, Finland, Sweden) amounted to € 1,420 million at Manufacturing Selling Prices[3] (excl. Greeting Cards and Cases & Satchels[4]).
- The Nordic market accounted for 9% of the total stationery consumption of the reviewed countries[5]. Compared to the other researched markets, Nordic countries (Denmark, Finland, Sweden) were one of the medium markets in Europe in 2005.
- Between 2004 and 2005, total stationery consumption increased by 2%.
- Nordic consumption of stationery products is forecast to grow by between 1 – 1.5% annually up to 2008.

[1] Please, note that by 'stationery' in the whole survey, it is meant 'stationery, office and school supplies'.
[2] Denmark, Finland and Sweden
[3] MSP (Manufacturing Selling Prices) – The price at which manufacturers sell products to resellers or direct to users.
[4] Consumption information is given for all mentioned product groups except for the segments Greeting Cards and Cases & Satchels. The research agencies used in this report are not gathering information for those two product groups. Separate information for them is given later in the text.
[5] Please, see footnote #1.

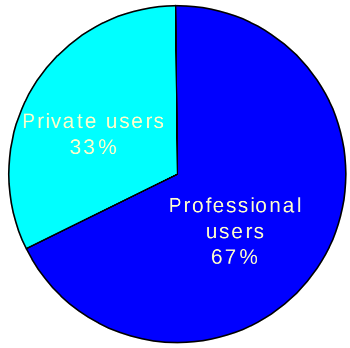
Product groups

- In 2005, Office furniture was the largest product group in the Nordic stationery market, accounting for about 61% of the market and € 865.5 million at MSP. The next largest segment was Paper-based items with 15% of the total Nordic stationery market, worth € 213 million.
- In third place by market share was Presentation & planning products with 7% of the total Nordic market and a value of about € 99.5 million.
- Office & Desk accessories, Writing & drawing instruments and Storage & Filling products were the smallest segments with relative shares 6% each and values of consumption respectively, € 78, € 82 and € 82 million at MSP.
- In conclusion, total consumption in the specified Nordic market is in general very stable. Even at a time of slowdown of the economy and of overall recession, the consumption figures for stationery items have remained relatively stable and even shown a marginal increase between the years 2003 and 2005.
- Up to 2009, the Nordic countries stationery market is projected to remain flat, before declining a bit at the end of the decade. This decline will be mainly because of reduced consumption of Paper-based products and a downturn in the consumption of Office furniture.
- Explanation for the above-mentioned developments can be found below in the sub-section *'Trends in consumption'.*

Market segmentation

In general, the stationery market can be segmented into three major market segments, i.e.: Private users, Small office and Home office users (SoHo) and Professional users (which also includes Schools & Universities). However, the line between the different segments is becoming increasingly blurred as the distinction between the work and the personal life begins to fade. In this sense, all mentioned segments are of interest for the exporters from the developing countries.
The Professional user segment in the Nordic countries includes public and governmental enterprises of various sizes, and ranges from medium sized companies with just over 10 employees to large companies with more than 100 employees. Schools and Universities are also considered professional users as they have similar characteristics.
The SoHo segment generally includes small offices with from 1 to 10 employees and home offices employing 1 to 3 persons. This segment also includes teleworkers working for an employer, or on a freelance basis, from home. The Private user segment includes domestic users, with sub-segments like children, teens, students, etc.
According to Iplusc, in the Nordic region Professional and SoHo users account for around 67.5% of the stationery market in 2004, whereas the Private users account for the remaining 32.5% of the stationery sold.

Figure 1.1: The Nordic countries stationery market, segmentation by user, % share, by value, 2004



Source: MPA International, Iplusc

Trends in consumption

- General trends in EU stationery consumption are given in Chapter 4 of the CBI market survey *'The stationery, office and school supplies market in the EU' (2006).* In this document, attention has been paid only to region-specific consumption trends.

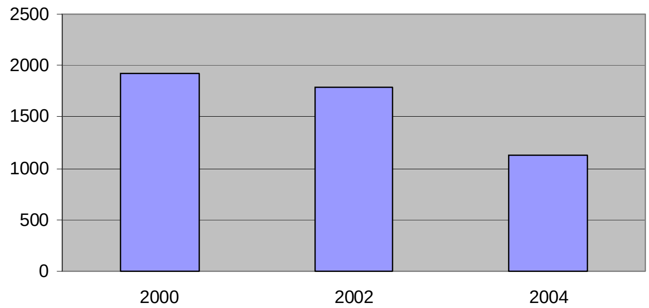
- According to MPA International, service industry employment is expected to increase throughout the region. In keeping with the Nordic trend, the share of the workforce within the Danish, Finish and Swedish agricultural and industrial sectors is declining, with the shares of the services and public administration sectors increasing slightly.
- The increasing number of PCs, e-mail and other types of electronic communication have tended to negatively affect the demand for Writing & Drawing Instruments and Paper-based items.

Production

Total production

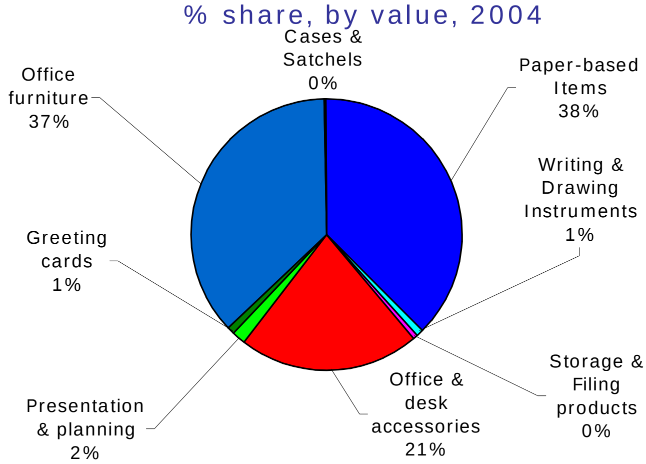
- In absolute value the estimated total production of the Nordic stationery market for 2004 was € 1,129 million (including Cases & Satchels and Greeting cards).
- In 2004, Nordic countries accounted for 4% of the stationery production of the reviewed countries, based on Eurostat statistics, which makes them one of the medium producers in the EU.
- In comparison to the previous years, the overall production is strongly declining (see Figure 1.2). In comparison to 2000, overall production has declined by more than 40%, which is remarkable for this four-year period.
- In short, the general forecast is for declining total production due to high variable and fixed costs in the reviewed countries, including relatively higher wages, taxation, etc.
- An overview of the production by product group is given in Figure 1.3[6].

Figure 1.2: The Nordic stationery market, total production, by value (€ millions)



Source: Eurostat database

Figure 1.3: Production in the Nordic stationery market, segmentation by product group, % share, by value, 2004



Source: Eurostat database

Major players

The Nordic countries are known for their paper production. The Swedish Bong (http://www.bongljungdahl.com/), one of Europe's leading envelope manufacturers, has plants both in Sweden and Finland. Other important Nordic manufacturers in this product segment are Bantex (http://www.bantex.com/) and Esselte (http://corporate.esselte.com/). A notable Paper-based Items manufacturer is the Finnish Geepap Oy (http://www.geepap.com/), which specifically targets children, pre-teens and

[6] Presentation and planning product group is between 0.4 and 0.1%.

teenagers with its products. Its product range focuses on notebooks, exercise books, diaries and memo pads.
Esselte, one of the world's leading stationery manufacturers, is present in the Office & Desk accessories product segment, with its subsidiary Leitz. Another sizable manufacturer is Bantex. Both Esselte and Bantex are also present in the Storage & Filling Product production. Esselte even claims to be the world leader in this product segment.
Linex A/S (http://www.linex.dk/) is a leading Danish manufacturer of Drawing Instruments. Leader in Office Furniture production in Scandinavia and in the whole EU is IKEA (http://www.ikea.com/).

Trends in production

- The general trend is for declining total production due to high variable and fixed costs in the reviewed countries including relatively higher wages, taxation, etc.
- Moreover, there is increasing price pressure in this industry because of cheap imports into the region, especially from South East Asia.

Opportunities and threats

- School and office populations are the main driver of demand for products in this sector. The slight increase in office populations in the Nordic region has not compensated for the decrease in school populations and, as a result, the Paper-based items and Cases & Satchels market will decrease over the years in volume terms. Those two segments, especially the latter, are partly supplied by the exporters from the developing countries.
- On the other hand, the biggest increase is expected in the consumption of Office furniture. Between the years 2005 and 2007, the absolute values of consumption of this specific product group will increase by about 2% annually. That might be an opportunity for developing countries exporters if they manage to increase their share of Office Furniture supply.

Useful sources

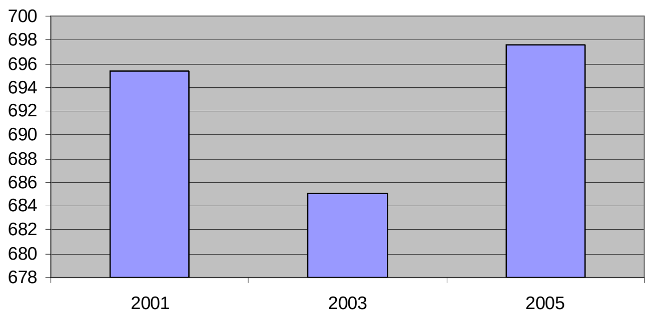
- Finnish Chamber of Commerce (network of business contacts + information on production on request): (http://www.liikeyhteyspalvelu.fi/index.cfm?lan=eng)
- Sweden Chamber of Commerce (find business partner + information on production on request): (http://www.chamber.se/en/services/findbusinesspartner/)
- Business proposals through the Danish Chamber of Commerce (information on production on request): (http://htsi.hts.dk/site/frames/2ndlevelframe.asp?PK_Link=55888)
- Free advertising on the website of the Danish Chamber of Commerce that can be viewed by 15.000 member companies. Your advertisement will furthermore be matched directly with relevant members of the Danish Chamber of Commerce, and emailed to them: (http://htsi.hts.dk/site/frames/2ndlevelframe.asp?PK_Link=55888)
- MPA International - A global consultancy specializing in marketing research and analysis in the office products industry: (http://www.mpainternational.com/)
- CBI – Center for the Promotion of Imports from developing countries (information on consumption and production): (http://www.cbi.nl/)

2. Trade: imports and exports

Total Imports

- Total imports into Nordic countries in value and volume were respectively € 698 million and 197 thousand tonnes in 2005.
- In 2005, Nordic countries took 7% of the total EU imports and this

Figure 2.1: Import in the Nordic stationery market, total imports, by value (€ millions)

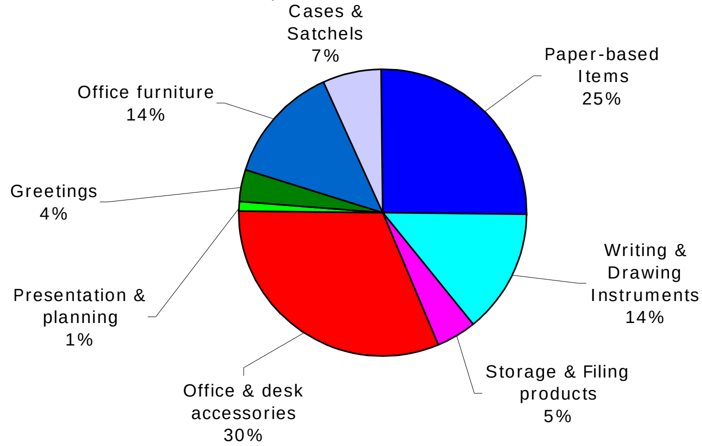


Source: Eurostat database

makes it one of the medium importers in the EU.

- In comparison to 2003, imports have increased by less than 1% (on the Figure 2.1 the scale is not zero-based which is why the increase seems so big).
- Overall, import growth is projected to continue, but developments in the international economy and in exchange rates remain the key medium-term risks to the economy. Moreover, it should be noted that the Nordic region consists of three researched countries, which show different trends and developments. For instance, in Finland imports are expected to grow at a firm pace on the back of lively domestic demand. In Denmark, the growth of imports is expected to dampen in line with domestic demand; the growth contribution of net exports should turn positive in the forecast period. In Sweden, imports should also grow faster as final demand strengthens.
- For the year 2005, the percentage of imports into the Nordic countries coming from the developing countries was more than 12%. For a comparison, this percentage was 9.8% in 2003.

Figure 2.2: Import in the Nordic stationery market, segmentation by product group, % share, by value, 2005



Source: Eurostat database

Imports by product group

For the relative size of the product groups in the Nordic countries import see Figure 2.2. An analysis of the changes of the share of the different product groups over the years shows that almost all of the product groups remained stable. Office Furniture and Cases & Satchels have increased their relative share of total imports. Major supplying countries of these imports from the EU members, non-EU members and especially form the developing countries are given in Table 2.1 in an exhaustive form.

Table 2.1 Imports by country and leading suppliers to the Nordic countries, 2003 - 2005, share in % of value

Product	2003 € mln	2005 € mln	Leading suppliers in 2005 (share in %)	Share (%)
Total market sector	685	698	Intra-EU: Germany 18.0%, France 6.0%, United Kingdom 5.2% Extra EU excl. DC: Norway 3.0%, USA 1.2%, Switzerland 1.2%, DC: China 8.9%, India 0.3%, Thailand 0.25%, Turkey 0.16%, Malaysia 0.19%	76% 12% 12%
Paper-based Items	172	176	Intra-EU: Germany 18.4%, United Kingdom 5.3%, France 3.4% Extra-EU excl. DC: Norway 7.3%, USA 1.35%, Hong Kong 2.03% DC : China 8.5%, India 1.07%, Malaysia 0.4% Thailand 0.26%, Indonesia 1.07%, Turkey 0.33%	71% 19% 11%
Writing & Drawing	101	97	Intra-EU: Germany 20.0%, United Kingdom 9.1%, France 8.0% Extra-EU excl. DC : Japan 5.6, Switzerland 4.7%,	65% 17%

Instruments			Taiwan 2.19%, USA 1.53% DC :China 14.6%, India 1.3%, Indonesia 0.83% Thailand 0.43%, Malaysia 0.74%, Turkey 0.14%	18%
Storage & Filing products	37	32	Intra-EU: The Netherlands 12.66%, Lithuania 10.8% Estonia 9.2% Extra-EU excl. DC :Norway 3.2%, Hong Kong 1.16%, Taiwan 0.34%, DC :China 12.8%, India 0.76%, Malaysia 0.19% Lao PDR 0.34%, Thailand 0.42%, Indonesia 0.8%,	80% 5% 15%
Office & desk accessories	227	218	Intra-EU: Germany 27.8%, France 8.53%, United Kingdom 6.23% Extra-EU excl. DC : USA 1.83%, Norway 1.5%, Taiwan 1.3%, Switzerland 1.0% DC : China 3.9%, India 0.1%, Indonesia 0.02% Turkey 0.08%, Thailand 0.08%, Malaysia 0.22%	88% 9% 5%
Presentation & planning	7	8.5	Intra-EU: Estonia 16.34%, the Netherlands 16.47%, France 10.54% Extra-EU excl. DC : Taiwan 2.22%, USA 0.73% Norway 0.1% DC :China 14.2 %, India 0.2%, Turkey 0.05%	81% 4 % 15%
Greeting cards	20	25	Intra-EU: United Kingdom 25.6%, the Netherlands 9.8%, Germany 8.9% Extra-EU excl. DC : Taiwan 2.22%, USA 0.73% Norway 0.1% DC :China 6.1 %, India 0.4%,Malaysia 0.42%, Indonesia 3.2% Thailand 1.37%	79% 9% 12%
Office furniture	84	95	Intra-EU: Germany 7.2%, Poland 3.9%, United Kingdom 3.6 % Extra-EU excl DC: USA 0.8%, Switzerland 0.3%, Norway 1.6% DC: China 4.6%, India 0.02%, Turkey 0.3%, Indonesia 0.03%, Malaysia 0.17% , Thailand 0.1%	91% 3% 6%
Cases and Satchels	36	46	Intra-EU: United Kingdom 7.14%, Belgium 14.0%, Germany 8.0 % Extra-EU excl. DC : Hong Kong 3.1%, Taiwan 0.53%, USA 0.5% Norway 0.2%, DC :China 42.4 %, India 1.3%, Vietnam 0.3%, Thailand 1.02%, Pakistan 0.1%	50% 5% 45%

Source: Eurostat database(2006)

Table 2.2 Detailed analyses of growing and declining suppliers per product group (2005 – 2003)

Country	Strongly increasing	Increasing	Stable	Decreasing
Paper-based Items	-	USA, Hong Kong, China, India, Malaysia	UK, Thailand, Turkey	Germany, France, Norway, Indonesia
Writing & Drawing Instruments	China	Switzerland, India, Indonesia	Germany, USA, Taiwan, Thailand, Malaysia, Turkey	France, UK, Japan,
Storage &	Lithuania,	Norway, Hong	Taiwan,	Estonia,

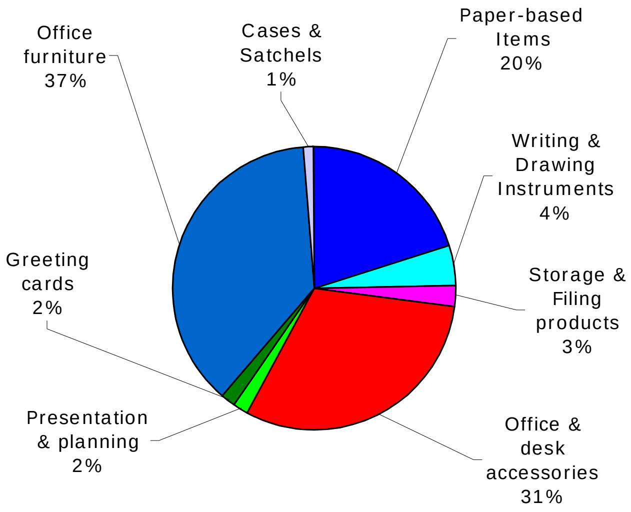
Filing products	the Netherlands,	Kong, China, India Lao PDR, Thailand	Malaysia, Indonesia	
Office & desk accessories	-	USA, China	Norway, Taiwan. India, Indonesia, Turkey, Thailand, Malaysia	UK, Germany, France, Switzerland
Presentation & planning	-	Turkey	Estonia	-
Greeting cards	-	Taiwan, USA, China, Malaysia, Indonesia, Thailand	India	UK, the Netherlands, Germany, Norway
Office furniture	-	USA, China, Turkey	Germany, Switzerland, India, Indonesia, Malaysia, Thailand	Poland, UK, Norway
Cases & Satchels	Germany, China	Taiwan, USA, India	UK, Norway, Hong Kong, Pakistan	Belgium, Vietnam, Thailand

Source: Eurostat database (2006)

Exports

- Total exports from Nordic countries in value and volume were respectively € 786 million and 278 thousand tonnes (including Cases & Satchels and Greeting cards) in 2005.
- In 2005, Nordic countries supplied 7% of the total EU stationery exports and it is one of the medium exporters in the EU.
- Between 2003 and 2005 the exports have increased by about 5% cumulative for all the Nordic stationery markets researched.
- According to Euro Area[7] forecast, at broadly stable exchange rates, Nordic's export markets are expected to expand firmly in the forecast period. Exports are anticipated to rebound and gain further momentum due to strong import demand from major trade partners (especially Russia). In short, for the whole Nordic region robust export growth is expected in the coming years and exports are expected to further surpass imports.
- For the relative share of the exported product groups, please,

Figure 2.3: Export in the Nordic stationery market, segmentation by product group, % share, by value, 2005



Source: Eurostat database

[7] Forecast made by Directorate – General for Economic and Financial Affairs.

see Figure 2.3.

Opportunities and threats

- An increasing share of the 12% of stationery imports into the Nordic region came from developing countries in 2005; this percentage was significantly higher in the following product groups: Cases & Satchels (45%).
- The share was significantly lower for the rest of the product groups: Paper-based items (18%), Storage & Filling products (15%), Presentation & Planning materials (15%), etc.
- In general, imports from developing countries are having the lowest relative shares in comparison to Intra- and Extra-EU trade in this region. This is a definite threat for those exporters as it seems that they do not still really have a market in Denmark, Finland and Sweden.

Useful sources

- EU Expanding Exports Helpdesk - http://export-help.cec.eu.int/
- Eurostat – official statistical office of the EU - http://epp.eurostat.cec.eu.int/
- European Commission - official publication (http://ec.europa.eu/economy_finance/index_en.htm)

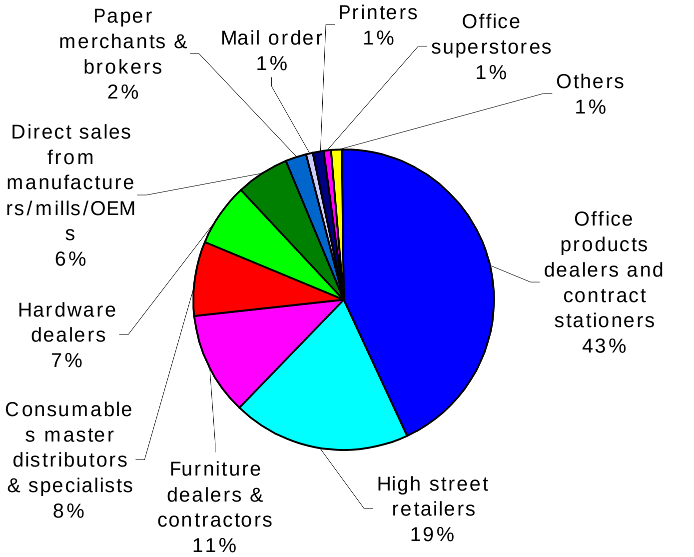
3. Trade structure

Traditionally, exports from the developing countries took place through a set of importers, who have then marketed the products to wholesalers, end-users, or retailers. The disadvantages of working through a large number of intermediaries include poor knowledge of market trends, inability to gain competitive advantage by adapting the product to specific customer needs and, of course, the margin lost at each stage of the value chain. On the other hand, *exporting on your own generally requires more of the resources of your company than exporting through an agent or importer/wholesaler.* In this chapter, the biggest and most prominent distribution and retailing channels are given, so that both types of exporters (ones which are using/not using intermediaries) can select the best channel for them.

Trade channels

Amongst the most important trade channels for exporters from the developing countries are big importers and wholesalers, most often buying groups. In the Nordic countries there are a number of buying groups present. Sweden is the home of Nio Fem (http://www.niofem.se/), which merged with Kontorsman. Today, the group operates under the Nio Fem name and has a member base of 32 dealers. In Denmark, Bopga A/S (http://www.bogpa.dk/) is the leading buying group. Moreover, amongst the big trade channels there is a certain trend of consolidation. An example is the strategic alliance of Office Depot, with other independent office supply dealers in each of the Nordic countries, EMO A/S, AGE Kontor & Data

Figure 3.1: Distribution of Stationery in the Nordic countries, segmentation by format, % share, by value, forecasts 2005



Source: MPA International

(http://www.age.se/) in Sweden, Beltton Group Plc (http://www.beltton.se/) in Finland and Meydan - Møller & Landschultz (http://www.mml.dk/) in Denmark.

Retail trade

In the retail to Private and SoHo users, the independent stationery retailers are losing ground to their more organised counterparts. In Sweden there are Bokia (http://www.bokia.se/) (104 stores) and Coop Sverige with their Akademibokhandeln (http://www.akademibokhandeln.se/)fascia (53 stores). In Finland, there are Suomalainen Kirjakauppa (http://www.suomalainen.com/) (59 stores) and Akateeminen Kirjakauppa (5 stores). In Finland the share of independent retailers is relative higher than in the other Nordic countries.

Department stores are not as common in the Nordic countries, especially not in Sweden. According to Euromonitor, this is large due to the relative small size of the population and the geographical limitations, making department stores a less attractive retail format. Also new formats, such as hypermarkets and discounters are making life difficult for the department stores, leading o.a. to discontinuing of the Domus department stores in Sweden in 2001. Leading department stores are Åhléns (http://www.ahlens.com/) (80 stores) in Sweden and Magasin (http://www.magasin.dk/) (9 stores) in Denmark. In Finland unlike, the other Nordic countries, department stores are a more profound feature in the retail landscape, in Finland Stockmann (http://www.stockmann.fi/) is the leading department store.

Trends

- Direct sales from manufacturers are expected to continue to decrease slowly in forthcoming years. This is partly due to the increasing role played by contract stationers in serving the corporate and public sector markets.
- Mail-order companies are also forecast to grow in the Scandinavian countries, targeting mostly people who are working from home. Moreover, in the future, they need to make more use of Internet in their sales, as this tendency is present in the whole developed world.
- Finally, high street retailers are becoming more and more influential in the stationery market as in recent times they started to sell office products in their top location stores and many people prefer to pay a higher price for the convenient placement of the retail complex.

Useful sources

- As far as company information in the Nordic stationery market is concerned, the Chambers of Commerce of the mentioned countries offer an interesting interface for searching for trade partners (check Useful sources in Chapter 1 'Market description: consumption and production').
- Moreover, there are certain agencies assisting foreigners in doing business in Scandinavia, e.g. (http:// www.anita-moeller.com).
- MPA International - A global consultancy specializing in marketing research and analysis in the office products industry: (http://www.mpainternational.com/)
- Office Products International Magazine (http://www.opi.net/index.asp?)
- See above mentioned web sites of major players in the Nordic region.

4. Prices

Price is an important selling factor, especially in the lower segments of the stationery market, whereas in the higher segments (higher added value) factors like quality and fashion are more important than price. In the lower segments of the stationery market, retailers have little room to manipulate prices because competition is very fierce and margins are low.

Table 4.1 Developments in import prices per product group in the period 2003-2005, % change

Paper-based Items	Writing & Drawing Instruments	Storage & Filling Products	Office & Desk Accessories	Presentation & Planning	Greeting Cards	Office Furniture	Cases Satchels
-1.60%	-6.60%	N.A.	-2.90%	-3.80%	N.A.	N.A.	-1.60%

As it is visible from the Table 4.1 above, import prices are decreasing for all product groups in the Nordic countries.
For more information on prices see *'The stationery, office and school supplies market in the EU' (2006) Chapter 9 'Prices'* and the web addresses provided under '*Useful sources'* of this chapter.

Useful sources

As far as up-to-date information about prices is concerned it is always feasible to collect relevant price information, both on end-users' prices and on competitors' price levels. One may find websites of wholesalers publishing prices valid for retailers: it is of the utmost importance to find out exactly what prices are published (end users / retailers / wholesalers) and if they are inclusive or exclusive of VAT! Below are mentioned some useful techniques for finding relevant information on prices:

- the CBI survey Guide for Market Research has a wide variety of good advice on how to use the internet for doing research;
- in general, one should always at least search for information in trade journals, at exhibitions, from competitors (do not hesitate to contact this group, either directly or indirectly), potential and existing customers, exporters in your own country that sell products in the same market
- when using the internet search machines, you may find out that using key words in the language of the country being researched will make it much easier; do not search only by using the words "Stationery, Office or School supplies", but also look for words of related markets or products; e.g. a manufacturer is advised to use the word "toys", as color pencils are also sold via that related market, or 'hobby' as they also sell in creative areas!
- Other sources of price information are the local producers. Below is supplied a short list of the most important producers in the Nordic region:
    - Esselte Leitz (http://corporate.esselte.com/)
    - Smead (http://www.smead.com/)
    - Bantex (http://www.bantex.dk/template/t01.php?menuId=2)
    - Cadara (http://www.adocsystems.com/)
    - Geepap Oy (http://www.geepap.com)
    - Bic (http://www.bicworld.com/index_en.asp)
    - Sanford (http://www.sanfordcorp.com/sanford/)
    - Edding (http://www.edding.com/)
    - Pentel (http://www.pentel.com/)
    - Linex (http://www.linex.dk/)

5. Market access requirements

As a manufacturer in a developing country preparing to access the Nordic region, you should be aware of the market access requirements of your trading partners and the Nordic government. Requirements are demanded through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns.

Legislative requirements

National legislation in EU countries is compulsory for all products traded within the country concerned. Therefore, as an exporter in a developing country you have to comply with the legislative requirements that are applicable to your products. For information on legislation for stationery go to 'Search CBI database' at http://www.cbi.nl/marketinfo, select your market sector, and the EU country of your interest in the category search, click on the search button and click on legislative requirements for an overview of all documents on legislation in your country of interest.

Non-legislative requirements

Social, environmental and quality related market requirements are of growing importance in international trade and are often requested by European buyers through labels, codes of conduct and management systems. For information on non-legislative requirements applicable to stationery, go to 'Search CBI database' at http://www.cbi.nl/marketinfo, select your market sector and the EU country of your interest in the category search, click on the search button and click on your subject of interest under non-legislative requirements for an overview of all documents on the subject concerned in your country of interest.

Packaging, marking and labelling

A detailed overview of other important packaging, marking and labelling aspects which are valid for all EU countries or for groups of EU countries, can be found in the CBI market survey *'The stationery, office and school supplies market in the EU' (2006)*. More information can be found as well in the web site of ITC Export packaging:
http://www.intracen.org/ep/packaging/packit.htm

Tariffs and quota

You can download information on requirements on tariffs and quota in specific EU markets from the CBI website. Go to 'Search CBI database' at http://www.cbi.nl/marketinfo, select your market sector and the EU country of your interest, click on the search button and click on 'market size, distribution, prices and margins' for an overview of documents on the country of your interest. For more information about the countries to which tariffs apply, please, see Chapter 10 'Market Access Requirements' of the *'The stationery, office and school supplies market in the EU' (2006)*.
The VATs rates in Denmark, Sweden and Finland are as follows 25%, 25% and 22%. However, rates within the EU will gradually be harmonized. Between EU countries there is free movement of goods. With the single European market, no VAT is levied on trade between EU-countries. Up-to-date information on import tariffs can be obtained from the TARIC database of the European Union (http://europe.eu.int/).

Useful sources

- International Standardisation Institute (ISO) (http://www.iso.org/)
- Comité Européen de Normalisation (CEN) - European Normalisation Committee (http://www.cenorm.be/)
- SGS Société Générale de Surveillance (SA) (http://www.sgs.com/)
- International Labour Organization (http://www.ilo.org/)

6. Business practices

Selecting a suitable trading partner

- A possible way of finding a business partner is the CBI Company Matching Tool, which can appropriately match your company to a Nordic partner. This can be the case only if your company meets the criteria of CBI for an eligible candidate and if it produces products that correspond with the eligible product groups. For more information on that and further procedures consult the CBI site http://www.cbi.nl. Another suitable way of finding a business partner(s) is to follow the steps of Chapter 5 of the CBI's Export planner, namely "Selecting trade partners". Possible ways of searching are through Internet, short-listing possible partners. You should travel around, pick up information, compare and select. An idea here is to visit trade fairs and exhibitions in the selected country (for more information on that, please see the last part of this chapter).

Possible options are:
- As far as company information in the Nordic stationery market is concerned, the Chambers of Commerce of the mentioned countries offer an interesting interface for searching trade partners (check Useful sources in Chapter 1 'Market description: consumption and production').
- Moreover, there are certain agencies assisting foreigners in doing business in Scandinavia, e.g. (http:// www.anita-moeller.com).

Coming to terms with your trade partner
- Nordic business people plan their time very precisely. In order to build a good relationship with them you should plan your meetings and appointments of any kind some time ahead. It is very important to send your documentation before any business negotiations and to inform you partners in a written form for any future phone calls. As far as punctuality is concerned, meeting your deadlines and keeping your promises is monitored very closely by Nordic business people. Preciseness and accuracy are appreciated when you are negotiating with your trade partners. For more information on trade practices and culture in Denmark as well as the business etiquette in the country, check: (http://www.executiveplanet.com/business-etiquette/Denmark.html). For more information on trade practices and culture in Sweden as well as the business etiquette in the country, check: (http://www.executiveplanet.com/business-etiquette/Sweden.html). For more information on trade practices and culture in Finland as well as the business etiquette in the country, check: (http://www.kwintessential.co.uk/resources/global-etiquette/finland-country-profile.html).
- The usual methods of payment in the Nordic region do not deviate substantially from that in the rest of European Monetary Union. However, the exact method of payment depends exclusively on the relation between buyer and seller and the trust between them. Young business relations with little knowledge between the business partners are determined by the position and the strength of the partners. Usually the one with a stronger position and longer experience in the field is the one setting the conditions not only of payment but also of delivery. For general information on payment and delivery option please refer to CBI's Export planner Appendices 1 & 2, namely 'Terms of payment 'and 'Terms of delivery'.

Sales promotion
For more information about trade fairs in the Nordic region visit following the web sites:
- Herewith is given the list of Nordic trade events: (http://www.fairlink.se/). The Danish trade show concerning stationery is called Formland Autumn (the exhibition concerns mostly Paper-based products): (http://www.formland.com/gb/exhibitorinfo/praktisk-info/halloverview.asp).
- Herewith is given the list of Scandinavian trade events: (http://www.fairlink.se/). The Danish trade show concerning stationery is called Formland Autumn (the exhibition concerns mostly Paper-based products): (http://www.formland.com/gb/exhibitorinfo/praktisk-info/halloverview.asp).
- Another address giving more information about trade shows in the Nordic region (http://www.biztradeshows.com)
- More on Nordic Exhibitions, Conferences & Trade Shows (http://www.eventseye.com/fairs/event_l271.html) (http://www.eventseye.com/fairs/event_l101.html) (http://www.eventseye.com/fairs/event_l511.html)
- Finally, this is the web address of the Furniture fair in Helsinki: (http://www.formamessut.fi/in_english/visitor_info/themes_and_trends.html)

This survey was compiled for CBI by DCT B.V. in collaboration with Ms. Y.Netto