CBI MARKET SURVEY

THE STATIONERY, OFFICE AND SCHOOL SUPPLIES MARKET IN THE NETHERLANDS

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Report summary

This CBI market survey discusses, amongst others, the following highlights for the stationery, office and school supplies market in the Netherlands:

- The total Benelux market accounted for 7% of the stationery consumption of the reviewed countries[1]. Compared to the other researched markets, Benelux was one of the medium-sized stationery markets of the countries discussed in this survey in 2005. The total consumption in Benelux amounted to € 1,132 million in the same year. The total consumption of stationery in the Netherlands amounted to € 679 million.
- In absolute value, the estimated total production of the Dutch stationery market for 2004 was € 894 million. In comparison to previous years, overall production is declining.
- Total imports into the Netherlands in value and volume were respectively € 689 million and 236 thousand tonnes in 2005. In the same year, the Netherlands took 7% of the total EU stationery imports and that made it one of the mid-sized importers in the EU.
- For the year 2005, the percentage of imports into the Netherlands coming from developing countries was more than 24%. For a comparison, this same percentage was 19% in 2003. Leading suppliers are: *China (13.5%), India (0.45%), Thailand (0.45%), Turkey (0.3%), Brazil (0.25%).*

This survey provides exporters of stationery[2] with sector-specific market information related to gaining access to the Netherlands. By focusing on a specific country, 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

Total market size

- The total consumption of stationery in 2005 in Benelux amounted to € 1,132 million at Manufacturing Selling Prices[3] (excl. Greeting Cards and Cases & Satchels[4]). The total consumption of stationery in 2005 in the Netherlands[5] amounted to € 679 million.
- The total Benelux market accounted for 7% of the stationery consumption of the reviewed countries. Compared to the other researched markets, Benelux was one of the medium-sized stationery markets of the countries discussed in this survey in 2005.

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[1] The reviewed countries are: France, Germany, Italy, The Netherlands, Spain, UK, Austria, Belgium, Cyprus, Czech Rep., Denmark, Finland, Greece, Hungary, Ireland, Poland, Portugal, Sweden.

[2] Please, note that by 'stationery' in the whole survey, it is meant 'stationery, office and school supplies'.

[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 would be given later in the text.

[5] Consumption information is available per region (Benelux). The consumption figures given in this report are computed based on 'per capita' assumptions.

- Between 2004 and 2005, total stationery consumption in Benelux decreased by -1.5%.
- To 2008 Benelux consumption is forecast to grow by about 0.5 - 1% annually.
- The Dutch, like the British, are large consumers of Greeting Cards. In 2003, the Dutch Greeting Card market was valued at approximately € 300 million.

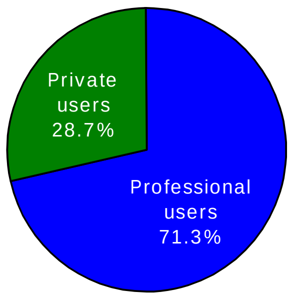
Product groups

- In 2005, Office furniture was the largest product group in the Dutch stationery market accounting for about 53% and € 359 million at MSP. The next largest segment was Paper-based items with 17% of the Dutch stationery market, worth € 113 million.
- In third place by market share was Writing & Drawing Instruments with 10% of the Dutch market and value of € 66 million.
- Storage & Filing products, Office & Desk Accessories and Presentation & Planning materials were the smallest segments with relative shares of 8.4%, 7% and 6% and values of consumption respectively of € 57, € 44 and € 39 million at MSP.
- The Paper-based items segment is forecast to decrease by more than 6.5% by 2008. Storage & Filling products and Writing & Drawing Instruments are the two groups forecast to remain decline marginally by the end of the decade.
- The best-performing segments are Office & Desk Accessories and Office Furniture, which are expected to increase by more than 8% by 2008.

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.

Figure 1.1: The Benelux Stationery market, segmentation by user, percent Share, by value, 2004



Source o.a. Iplusc and MPA International

According to Iplusc, professional users accounted for 71.3% of the Benelux stationery sales in 2004, the remaining 28.7% is made up by private users. Unfortunately, the SoHo users are not researched as a separate entity, so consumption of the SoHo users is included in both groups. Both the Professional and the Private user markets showed a decline during the last recession, especially between the years 2003 and 2005. Naturally, the professional sector was more affected by the downturn of the economy and it accounted for a bigger share of the percentage decrease in the stationery market. In the coming years, the expected recovery of the Dutch economy will also have more impact on professional users, due to increasing employment and production which in turn will affect the consumption of office products in the country.

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 country-specific consumption trends.

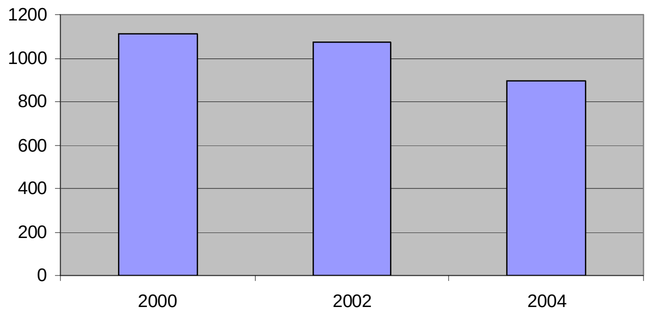
- In Benelux, the market is very mature and innovation is playing a key role in attempts to extend the market. Different types of innovation include improvement of design, ergonomics, comfort, reliability and technology.
- The increasing penetration of PCs, both in the educational and in the commercial environment in the Benelux region continues to have a negative impact on the demand for Paper-based products.

Production

Total production

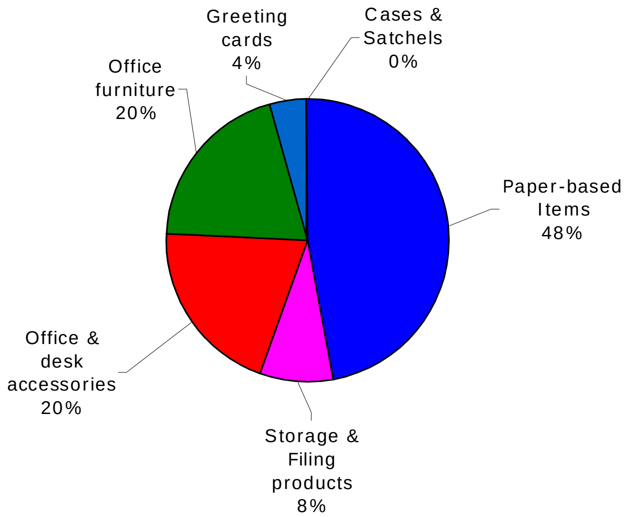
- In absolute value, the estimated total production of the Dutch stationery market for 2004 was € 894 million.
- The Netherlands accounted for 3% of the stationery production of the reviewed countries in 2004, based on Eurostat statistics, which makes it one of the smaller producers in the EU.
- In comparison to previous years, overall production is declining (see Figure 1.2). In comparison to 2002, production has decreased by more than 17%.
- Forecasts for Dutch stationery production are not very positive for the future. Increased price competition from imports and stagnating consumption will impact production growth negatively.
- An overview of the most produced product groups is given in Figure 1.3 (due to unavailable information in the Eurostat database some of the product groups are not present in the figure).

Figure 1.2: The Dutch stationery production, by value (€ millions)



Source: Eurostat database

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



Source: Eurostat database

Major players

Dutch production largely consists of foreign manufacturers with a production basis in the Netherlands. The American company Smead (http://www.smead.com/) acquired Atlanta-Hoogezand BV, a Dutch stationery manufacturer, and established its European headquarters in the Netherlands. Smead operates with three manufacturing plants and produces Storage & Filing Products, Paper-based Items and Office & Desk Accessories. Stadtman (http://www.stadtman.nl/), owned by the Swiss Biella Group, is an important manufacturer of Storage & Filing Products. In 2003, the German Mayre-Kuvert Group (http://www.mayer-kuvert.de/englisch/) took over the Dutch Stronghold Group, an envelope manufacturer.

There are however, some smaller manufacturers, such as Paperclip, a Greeting cards and school stationery manufacturer and Cartesse (http://www.cartesse.nl/), also producing Greeting Cards and some school related stationery.
Another notable Dutch manufacturer is Lutkie Cranenburg (http://www.lutkie.nl/), a private-label manufacturer with a turnover of around € 21.0 million. Amongst the products manufactured are ring binders, notebooks, exercise books and scrapbooks.

Trends in production

- Competition among producers is tough and some of them are pricing aggressively to stay in the local market. The Dutch stationery market is, however, not increasing fast enough to give space to all the players. So some consolidation on the manufacturing side is expected and smaller entities may leave the market.
- The aggressive pricing should also increase the outsourcing trend amongst producers, and many of them have already started to place their production facilities in China and other Asian countries.
- Manufacturers who are more export-oriented will be positively affected by the economic revival of their biggest trade partners, which are the other EU countries.
- In Benelux, producers have tried to fight the competition in the market by developing better quality products and more fashionable, state-of-the-art designs.

Opportunities and threats

- Unfortunately, there are no great opportunities in the Dutch stationery market especially when looking at the prospective consumption figures. Consumption is increasing so little that the market is almost static.
- On the other hand, cheaper products were the trend in the recession years. This could be an opportunity and also a threat. An opportunity because private households will continue to seek cheaper production in the coming years, due to their decreased disposable income. That in turn may give exporters from the developing countries some scope for their non-labelled imports.
- On the other hand, static consumption is always an impediment to trade. Dutch producers and selling agents will also try to exploit more the export side of trade and to search for foreign markets.

Useful sources

- MPA International - A global consultancy specializing in marketing research and analysis in the office products industry: (http://www.mpainternational.com/)
- Office Products Magazine (http://www.opi.net)
- Dutch Chamber of Commerce (http://www.kamervankoophandel.nl/home/homeUK.asp)
- Dutch Trade Association for international Business and Cooperation (http://www.evd.nl/business/)
- Holland trade pioneer organization (http://www.hollandtrade.com/vko/home.asp)
- Dutch governmental focused on international trade (http://www.evd.nl/business/programmes/)
- European Writing Instruments Manufacturers Association (EWIMA) (http://www.ewima-isz.de/)
- European envelope manufacturers association (http://www.fepe.de/)
- Boleka Dutch stationery organization (http://www.boleka.nl/)
- Novaka Dutch stationery organization (http://www.novaka.nl/)

2. Trade: imports and exports

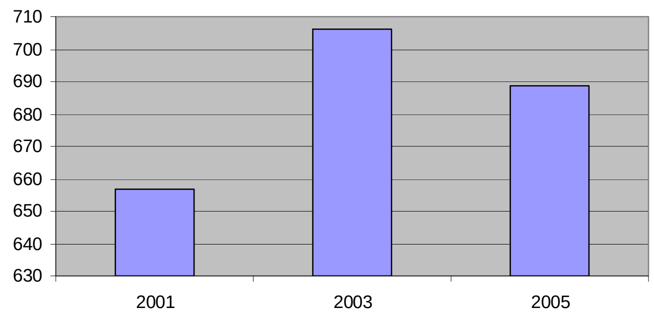
Total Imports

- The size of total imports into the Netherlands in value and volume were respectively € 689 million and 236 thousand tonnes in 2005.
- In 2005, the Netherlands took 7% of the total EU stationery imports and was one of the

medium to small importers in the EU.

- In comparison to 2003, the imports in 2005 decreased by less than 2%.
- The Netherlands presents one of the most interesting import pictures in Europe. Imports and exports in this country are highly correlated, as a huge volume of imported stationery products is re-exported. In short, imports will increase if export markets for Dutch selling agents show some opportunity prospects.
- Overall, import growth is projected to continue, pushed by the recovery in domestic demand and by buoyant re-exports.
- For 2005, the percentage of imports into the Netherlands coming from developing countries was more than 24%. For a comparison, this percentage was 19% in 2003.

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

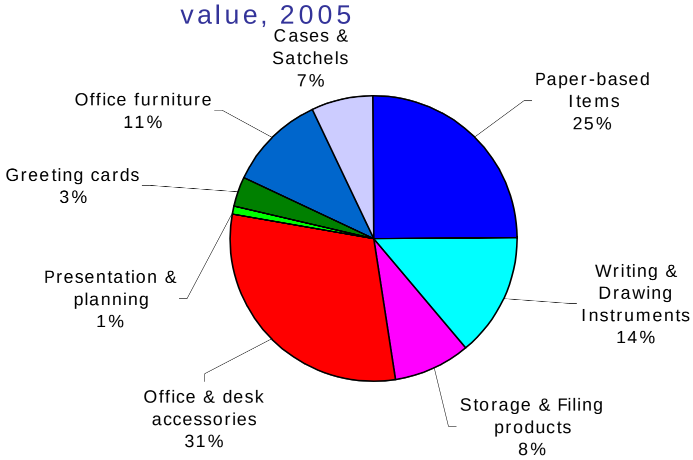


Source: Eurostat database

Imports by product group
For the relative size of the product groups in the Netherlands import see Figure 2.2.

The only two product groups which are seeing increasing demand for imports in absolute values are Storage & Filling products and Presentation & Planning materials. All of the rest mentioned groups showed a decline in their growth over the years in absolute values. Major supplying countries of these imports from the EU members, non-EU members and especially from the developing countries are given in Table 2.1 in an exhaustive form. It is a fact that the Netherlands is re-exporting more than 50% from its imports and for more on that please see the *Export* section of this chapter.

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



Source: Eurostat database

Table 2.1 Imports by product and leading suppliers to the Netherlands, 2003 - 2005, share in % of value

Product	2003 € mln	2005 € mln	Leading suppliers in 2005 (share in %)	Share (%)
Total market sector	706	689	Intra-EU: Germany 28.%, Belgium 12.3% France 5.6%	63%
			Extra-EU excl. DC: USA 3.0% Switzerland 4.0%, Taiwan 0.9%	13%
			DC*: China 13.5%, India 0.45%, Thailand 0.45%, Turkey 0.3%, Brazil 0.25%	24%

Paper-based Items	182	171	Intra-EU: Germany 29.4%, Belgium 16%, United Kingdom 5.2% Extra-EU excl. DC: USA 2.32%, Hong Kong 1.94%, Taiwan 0.85%, South Korea 1.7% DC : China 16.3%, India 0.6%, Malaysia 0.54%, Thailand 0.54%, Indonesia 0.33%, Turkey 0.6%	71% 10%. 19%
Writing & Drawing Instruments	101	097	Intra-EU: Germany 18.8%, France 11.2%, United Kingdom 3.9% Extra-EU excl. DC: USA 4.0%, Hong Kong 3.4%, Japan 3.1%, Switzerland 2.4% DC: China 32.6%, India 1.7%, Mexico 2.3% Thailand 0.16%, Indonesia 3.2%, Turkey 0.21%	43% 16% 41%
Storage & Filing Products	51	59	Intra-EU: Germany 44%, United Kingdom 20.9% France 16.4% Extra-EU excl. DC: Hong Kong 0.53%, USA 1.54%, Switzerland 4.7 %, Taiwan 0.91%, DC: China 12.7%, India 5.9%, Malaysia 0.1%, Thailand 0.16%, Turkey 0.8%	72% 9% 19%
Office & desk Accessories	227	209	Intra-EU: Germany 15%, Belgium 11.3%, Italy 9% Extra-EU excl. DC : USA 5.5%, Japan 3.7%, South Korea 0.14%, Taiwan 0.9%, Switzerland 4.3% DC : China 9.6%, Brazil 0.23%, Turkey 0.07%, Pakistan 0.2%, Malaysia 0.4%	75% 17% 11%
Presentation & Planning	3	5	Intra-EU: Germany 36.2%, Belgium 13.4%, Portugal 5.4% Extra-EU excl. DC : USA 0.82%, Hong Kong 0.79%, Switzerland 0.2%, Taiwan 0.4% DC: China 26.3 %, Mexico 3.3%, Turkey 0.03%, Thailand 4.61%	63% 3 % 34%
Greeting Cards	7	24	Intra-EU : Germany 8.2%, Belgium 5.5%,Italy 2.6% Extra-EU excl DC : Hong Kong4.6%, Israel 0.7%, Taiwan 0.66% DC : China 55.7%, Turkey 2.5%, Indonesia 2.09% Malaysia 0.18%, Thailand 3.01%	19% 17% 64%
Office Furniture	86	77	Intra-EU: Austria 13.2%, Poland 11.8%, Denmark 9.8 % Extra-EU excl DC: USA 4.4%, Switzerland 0.5%, Taiwan 1.65% DC: China 5.3%, Malaysia 0.3%, Turkey 8.8%, Indonesia 0.2%, Ukraine 0.13%, Brazil 4.5%	73% 7% 20%
Cases & Satchels	49	47	Intra EU : Belgium 15.4%, Germany 7.6%, United Kingdom 3.0% Extr EU excl DC: USA 2.0, Hong Kong 5.0%, Japan 1.0% DC: China 57.3%, India 1.7%, Indonesia 2.5%, Thailand 0.3%	28% 9% 63%

Source: Eurostat (2006) *Developing countries

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

Country	Strongly increasing	Increasing	Stable	Decreasing
Paper-based Items	-	USA, Hong Kong, South Korea, China,	India, Malaysia, Thailand,	Germany, Belgium,

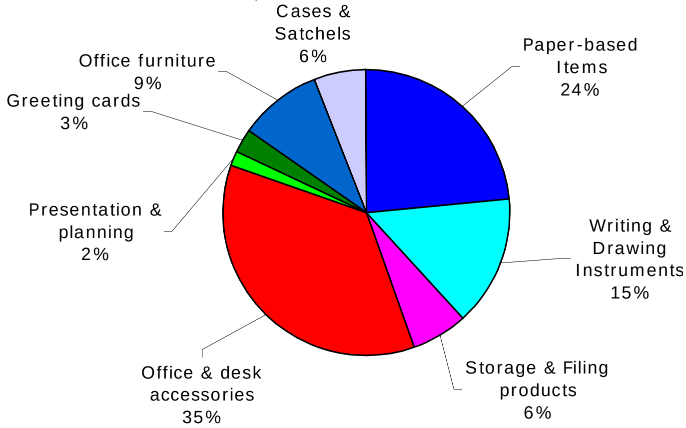
		Turkey	Indonesia	UK, Taiwan
Writing & Drawing Instruments	Germany, China	Hong Kong, Switzerland, India, Mexico	USA, Thailand, Indonesia, Turkey	UK, France, Japan
Storage & Filing products	China, India	Turkey, Switzerland, France	Hong Kong, Taiwan, Malaysia, Thailand	Germany, USA
Office & desk accessories	-	Italy, Japan, China	Malaysia, Pakistan, Turkey, Brazil, Taiwan, USA	Belgium, Germany, Switzerland, South Korea
Presentation & planning	Germany, China	Portugal, Switzerland, Mexico	USA, Hong Kong, Taiwan, Thailand	Belgium, Turkey
Greeting cards	China	Israel, Taiwan, Indonesia, Malaysia, Thailand	Hong Kong,	Belgium, Germany, Italy, Turkey
Office furniture	Denmark	USA, Taiwan, China, , Turkey, Brazil, Switzerland, Austria, Poland	Malaysia, Indonesia, Ukraine	-
Cases & Satchels	-	Germany, UK, Hong Kong, Japan, Indonesia	Thailand, India, Belgium	USA, China

Source: Eurostat database

Exports

- Total exports from the Netherlands in value and volume were respectively € 603 million and 158 thousand tonnes in 2005.
- In 2005, the Netherlands supplied 5.6% of the total EU stationery exports and it is one of the medium to small exporters in the EU.
- In comparison to 2003, exports have decreased by about 10%.
- In 2007, export growth should accelerate closely related to the rise in exports markets. In parallel, imports will accelerate too, pushed by the recovery in domestic demand and by buoyant re-exports. For the relative share of the exported product groups, please, see Figure 2.3.

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



Source: Eurostat database

Opportunities and threats

- An increasing share of 24% of stationery imports into the Netherlands came from developing countries in 2005; this percentage was significantly higher in the following product groups: Cases & Satchels (63%), Greeting cards (64%), Writing & Drawing Instruments (41%) and Presentation & Planning materials (34%).

- The share was significantly lower for the product groups: Office Furniture (20%), Paper-based items (19%), Storage & Filling products (19%) and Office accessories (11%).
- Import prices will be under pressure and the decrease in average import prices will put further pressure on Dutch producers and force them to pare margins and/or to source abroad even more. Exporters should note that this is a case of: an opportunity if you can respond, a threat if you can't!

Useful sources

- EU Expanding Exports Helpdesk - http://export-help.cec.eu.int/
  Go to: trade statistics.
- Eurostat – official statistical office of the EU - http://epp.eurostat.cec.eu.int
  Go to: 'themes' on the left side of the home page - 'external trade' - 'data – full view' - 'external trade - detailed data'.
- 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

The Dutch stationery distribution landscape is fragmented and characterized by intense competition, as almost all large international players in the stationery market are present in the Dutch market.
The Netherlands is home to one of the world's largest stationery companies Buhrmann (http://www.buhrmann.com/nl/).

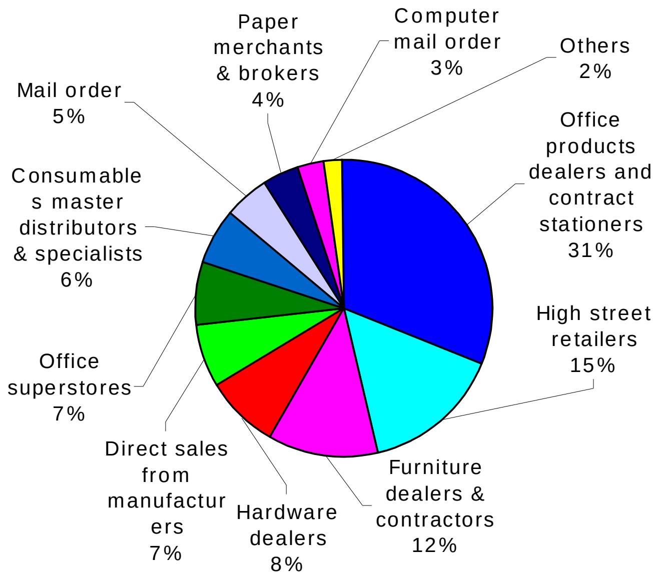
Buying groups are of considerable importance in the Dutch stationery market. Today, the market is dominated by two buying groups, Quantore (http://www.quantore.com/) and Hameco (http://www.hameco.nl/). Quantore is the largest stockholding/buying group in the Netherlands with over 500 members including both office supply dealers and retailers. It also operates two retail formulas, All Office and Thuiskantoor. Hameco, with 325 members, in contrast to Quantore, does not operate its own warehouses; it makes use of other distributors, such as Timmermans (http://www.timmermansnet.com/) a Belgium wholesaler, to supply its members. Currently, N.V. Timmermans is the representative in Benelux of Spicers (http://www.spicers.net) and is influential in Belgium as a dynamic manufacturer, importer and wholesaler of office and school supplies.

The Dutch Professional user market is dominated by the contract stationers Corporate Express (a subsidiary of Buhrmann) and Ahrend (http://www.ahrend.com/), which take up an important share of the market. Other important contract stationers in the Dutch market are Guilbert (http://www.guilbert.com/) and Lyreco (http://www.lyreco.com/). The contract stationers and the office product dealers comprise 31.6% of the channel shares in Benelux and they are further expected to expand due to stronger purchasing power and a wider range of products.

Retail trade

Between 2002 and 2004, the stationery retailers lost market share, as result of sluggish economic development. Bruna (http://www.bruna.nl/), is the leading franchise chain selling stationery, it operates 370 stores throughout the country. Next to stationery it sells books, magazines, multimedia and suchlike.

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



Source: MPA International

The self-service & department stores account for more than 10% of sales. Due to the absence of hypermarkets in the Dutch market, department stores and, to lesser extent, supermarkets largely make up this segment. As regards the department stores, Vroom & Dreesmann (http://www.vroomendreesmann.nl/) (V&D) and Hema are the most important sellers. Vroom & Dreesmann, in particular, has an extensive range of stationeries. The back-to-school period is the most important selling period. The range of Hema (http://www.hema.nl/) is generally smaller, and mainly consists of good quality, lower-priced private label products. Action (http://www.action.nl/), a fast growing chain of discounters, with over 150 stores, sells stationery next to a large variety of other products. This format generally targets the price-conscious SoHo and private users. Of their product range only around of 40% is fixed.

Mail-order & superstores are also of considerable importance. In the Netherlands, Staples operates under the Office Centre name and operates 43 superstores. Mail-order in the Netherlands is also well developed and extremely competitive, with many players, such as Viking (http://www.vikingdirect.nl/) (Office Depot) and Overtoom (http://www.overtoom.nl/) (Majuscule Group) operating in the Dutch market. A notable company is Reprint (http://www.reprint.nl), which is specialized in e-commerce. The company focuses on the marketing of stationeries, heavily relying on advertisements on Dutch radio and television. The company outsources the distribution of its products to other companies

Trends

The main trends discussed below relate to the whole of Benelux:

- Office product dealers and contract stationers are expected to increase their channel's share in the coming years. The main reasons for their expansion are larger capital resources and further enlargement of the already big players by mergers and acquisitions.
- High street retailers are another group which is projected to have quite positive future, especially due to the increase in the Electronic Office Supplies sales (not a topic of this survey).
- Direct sales from manufacturers are projected to decrease in the future, as those companies try to reduce their sales costs.
- It is also projected that dealer groups will continue the process of consolidation and the Benelux market will become very competitive in the near future.

Useful sources

- Boleka - Dutch trade association for stationery items: (http://www.boleka.nl/)
- NOVAKA - Dutch trade association for stationery items: (http://www.novaka.nl/index.cfm/4,html) (here search for partners/members is also possible)
- Ahrend (http://www.ahrenddirect.nl/)
- Basicoffice (http://www.basicoffice.nl/)
- Office centre (http://www.officecentre.nl/)
- Bruna (http://www.bruna.nl/)
- Hema (http://www.hema.nl/)
- De Bijenkorf (http://www.debijenkorf.nl/)
- Kijkshop (http://www.kijkshop.nl/)
- Kars (http://www.kars.nl/)

4. Prices and margins

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
-4.70%	-14.80%	-19%	N.A.	-1.20%	N.A.	-17%	N.A.

As it is visible from Table 4.1, import prices are decreasing for all product groups in the Netherlands.
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, 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. Extensive list of important producers and suppliers in the Netherlands is given in chapter 3 'Trade structure' under 'Useful sources'.

5. Market access requirements

As a manufacturer in a developing country preparing to access the Netherlands, you should be aware of the market access requirements of your trading partners and the Dutch 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)*.
For the Netherlands VAT is 19%. 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/)
- Nederlands Normalisatie Instituut (NNI) (http://www.nen.nl/)
- 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 Dutch 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". Moreover, exporters can contact the two Dutch stationery organizations below, namely:

- Boleka - Dutch trade association for stationery items: (http://www.boleka.nl/)
- NOVAKA - Dutch trade association for stationery items: (http://www.novaka.nl/index.cfm/4,html) (here search for partners/members is also possible).

Coming to terms with your trade partner

- Generally, the Dutch will not spend a lot of time socializing before a meeting or other business discussion. Often, as soon as the necessary introductions are made, they will proceed with the business at hand. As people, they respect qualities such as straightforwardness and honesty. In this culture, directness is preferred to evasiveness. Usually, constructive criticism is felt to be more useful than compliments. During negotiations when you really want to say 'no', tentative answers such as 'I'll consider it', 'We'll see', or 'perhaps' are not acceptable to the Dutch. Even if you find it difficult to say 'no', you'll find that your Dutch counterparts will prefer and appreciate a candid reply. The best piece of advice while negotiating is not to make promises lightly as you will be expected to keep every promise you make, no matter how offhand or insignificant it may seem. Moreover, if the Dutch suspect that they cannot trust you, they may very well call off the deal.
- As for empirical data, when evaluating the merits of a proposal or making a final decision, very little credence is given to subjective feelings; this is a society of concrete facts, statistics and other hard data. Data and information are crucial, the Dutch tend to be wary of inflated claims, so use plenty of empirical evidence and other data to persuade them of the merit of your products or ideas. A simple and direct presentation will be appreciated.
- As far as the language specifications are concerned, it is unnecessary to have your business card translated, since most Dutch businesspeople are fluent in English. Even if you do not translate your presentation material into Dutch, it's essential that any documents you distribute are clear and concise. Good visuals are another asset. The Dutch are used to high quality brochures and the like.
- The usual methods of payment in the Netherlands do not deviate substantially from that in the EU. 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

Officeworld is the trade fair for office supplies in the Netherlands (http://www.officeworld.nl/). It was first established in 2000 and was a great success right from the start. The first edition, with 45 exhibitors, attracted 1.500 visitors. In 2003 it welcomed 73 exhibitors and over 2.100 visitors at the showground. Officeworld 2005 closed with a record number of visitors; 2.550 interested people visited the expo floor. This is an increase of 15 percent compared with 2004. Magenta Expo is organizing the expo, together with Boleka, a strong trade organisation of manufacturers and local representatives for office products. Magenta is also publisher of several trade magazines, such as KBM (Kantoor Business Magazine), CBM (Computer Business Magazine) and Kantoor & Efficiency and the website (www.kantoornet.nl), the actual news source for the entire industry. The location of the fair is Brabanthallen DEN BOSCH (http://www.brabanthallen.nl).

Officeworld 2006 will give the opportunity to meet three markets in one event:
- Stationery Days; trade in business-to-customers
- Officeworld; trade in business-to-business
- An extra day for professional end-users

For more information about trade fairs in the Netherlands visit the web sites giving more details on that:
- Stationery days (http://www.stationerydays.nl/)
- Another address giving more information about trade shows (http://www.biztradeshows.com/netherlands/)
- More on Dutch Exhibitions, Conferences & Trade Shows (http://www.eventseye.com/fairs/event_l541.html)

For more information about trade press in the Netherlands visit the web sites giving more details on that:
- KantoorVak Trends & Design (http://www.kantoorvak.nl/)
- KBM, Kantoor Business Magazine (http://www.kantoornet.nl/)

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