

Canadian-Nepal Export Report: Rubber Chicken Plucker Fingers

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November 14, 2015

**PART I: PRODUCT INFORMATION:****Introduction of Product:**

Rubber chicken plucker fingers are the product that will be investigated for export to Nepal. Chicken pluckers fingers are an essential part of chicken pluckers that are used to remove the feathers of birds during poultry meat processing. The specific type of plucker fingers can be tailored to the particular types of feathers of the native poultry flocks. The use of plucking technology will benefit the broiler farms and poultry processors throughout Nepal. This report will investigate a Canadian company that manufactures and distributes poultry processing equipment and offer an analysis of the product and logistics of its transportation. Plucker fingers will be thoroughly and critically examined in terms of potential benefits of the products' implementation into the Nepalese agricultural sector, specifically in the poultry meat industry.

**Description of the Company:**

CG Manufacturing and Distribution Inc. is a Canadian company located in Cambridge, Ontario (CG Manufacturing, 2015). A reputable company in Canada's poultry industry, CG Manufacturing and Distribution Inc. supplies new, used, and reconditioned poultry processing machines and equipment (CG Manufacturing, 2015). The company stands in collaboration with many international food and poultry processing firms (CG Manufacturing, 2015). Companies associated in a strategic partnership with CG Manufacturing include Cobb International Corporation and BioAgro Asia Co., Ltd (BAA) (CG Manufacturing, 2015). Cobb International Corporation is an establishment also located in Cambridge, Ontario that has been in the poultry industry

since 1978 (CG Manufacturing, 2015). BioAgro Asia Co., Ltd is the market appendage of CG in providing poultry processing equipment in Asia, located in Thailand (CG Manufacturing, 2015).

**Description of Product(s):**

An important part of meat poultry processing is the procedure of defeathering poultry birds. Defeathering is more commonly known as plucking, and is a process that has been significantly improved due to advancements in machinery and technology (Yakovleva Flynn, 2004). There are many variations to the modern plucking machine that exist today; these include machines used in pbot heavy industrial process and smaller scaled machines used in smaller scale production systems (A. Duran, Personal Communication, November 20 2015). Often the larger-scale plucking machines are more expensive, as they can rapidly remove feathers from a multitude of birds at a time (A. Duran, Personal Communication, November 20 2015). Smaller-scale mechanised pluckers are capable of processing fewer birds at a time but cost less, and are often used by hobby farms in minor meat poultry operations (A. Duran, Personal Communication, November 20 2015). However, many small-scale farmers actually construct homemade pluckers (A. Duran, Personal Communication, November 20 2015). Homemade pluckers are assembled from a variety of materials such as hand held electrical drills or fan motors (A. Duran, Personal Communication, November 20 2015). Regardless of type, one item is consistently used throughout the different models: the plucker finger pullers (CG Manufacturing, 2015). When in motion, these fingers create the friction necessary to pull the feathers off a carcass (Buncic, 2011). Being rubber, the plucker finger can be effectively sanitized and easily replaced (Posch, 2006). CG Manufacturing and

Distribution Inc. offers a variety of chicken puller fingers that are usable for a multitude of different plucking machines. These plucker fingers differ in shape and size, as they are usually made for specific brands of plucking machinery (CG Manufacturing, 2015). The cheapest plucker fingers can be purchased as they come from a small-scale chicken plucker that cost \$4,000 (A. Duran, Personal Communication, November 20 2015). The number of plucker fingers that are associated with this plucker is two hundred; this results in a cost of \$150/ 200 units, meaning there is a valuation of \$0.75 for each individual plucker finger (A. Duran, Personal Communication, November 20 2015) (See Figure#1). It is notable to state that even at this cost there are still variations for the specific type of plucker fingers, since some can be harder or softer for different types of poultry (A. Duran, Personal Communication, November 20 2015). CG Manufacturing recommends that if a plucking machine is used often, the plucker finger should be replaced annually (CG Manufacturing, 2015). When compared with other companies that produce chicken pluckers, CG Manufacturing products cost more, but they are guaranteed to follow Canadian protocol and are high quality (A. Duran, Personal Communication, November 20 2015).



Source: CG Manufacturing and Distribution Limited <http://www.cgmfg.ca/product-selector/category/stork-d161-defeathering>

**Figure#1:** An image showing some of the varieties of chicken plucker finger available from CG Manufacturing.

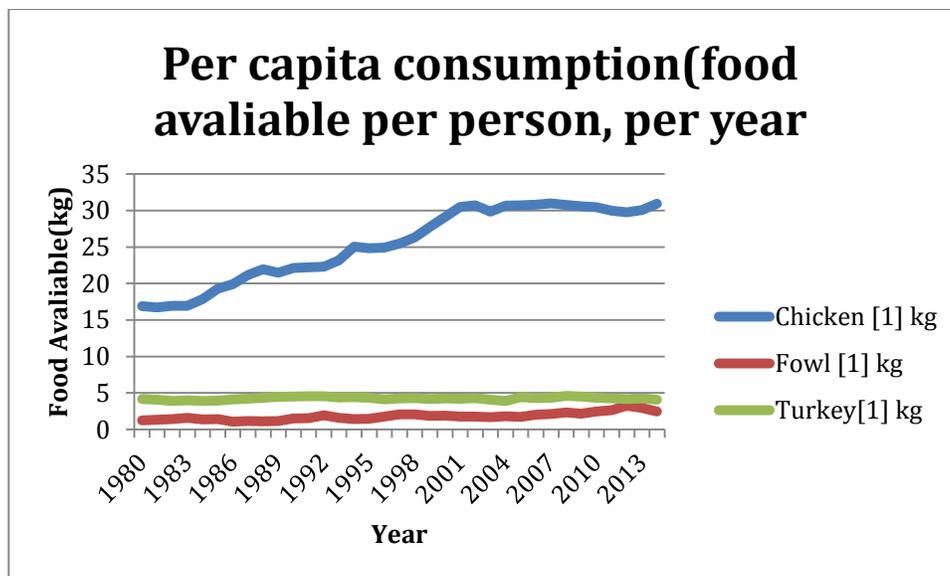
Table#1: Companies and the location, product information and price of chicken plucker fingers.

Company/Supplier:	CG Manufacturing and Distribution Inc.	Guangzhou Sentuo Rubber Products Co., Ltd.	Shanghai Qينو Industry Co., Ltd.
Location	Cambridge, Ontario, Canada (No specific catalogue number available)	Guangdong, China (Mainland) Model Number: Sentuo_A1501	Shanghai, China (Mainland) Model Number: Unavailable (due to custom parts).
Product information	<b>Rubber Finger Puller</b> Minimum order: 200 units	<b>Chicken Plucker Rubber Finger</b> Minimum order: 1000 units	<b>Rubber Plucker Finger</b> Minimum order: 100 units
Price (CAD)	\$150/200 plucker fingers 1 plucker finger = \$0.75 5000 plucker fingers = <b>\$3750</b>	1 plucker finger = \$0.01(USD) \$0.01x1000 units = \$10/ 1000units 5000 plucker fingers = \$50/1 USD= x/1.34 CAD = <b>\$67</b>	1 plucker finger = \$0.5(USD) 5000 plucker fingers = \$2500= \$2500(USD)/1=x/1.34 CAD = <b>\$3,350</b>

**Figure #2:** A price comparison of rubber poultry plucker fingers between CG Manufacturing and two other Chinese manufacturers. If 5,000 plucker fingers were shipped to Nepal, Guangzhou Sentuo Rubber Products would produce the cheapest product. Priced at 67\$ *before* tax and transportation costs. Prices retrieved from a <http://www.alibaba.com> and personal communication with Antonio Duran, a CG Manufacturing employee.

### **Poultry Processing Industry in Canada:**

The meat poultry industry in Canada has been a growing business that includes meat products from broilers, turkeys, ducks, pheasants, and a selection of other birds (Agriculture and Agri-Food Canada, 2013). The eviscerated equivalent in 2013 summed 1.2 billion kilograms of commercial chicken and turkey meat production (Agriculture and Agri-Food Canada, 2013). Poultry meat reaches the consumers in all facets; meat is provided to restaurants, fast-food chains, markets, hotels, and other bodies (Agriculture and Agri-Food Canada, 2013).



Source: Statistic Canada. Calculations done by AAFC-AID, Market Information Section

**Figure #3:** The amount of turkey, chicken and fowl consumed per person per year by Canadians from 1980- 2013. As shown above, there relatively been a consistent increase in chicken consumption.

### **Uses in Canada:**

In Canada, chicken pluckers are used for the primary processing of poultry birds. Smaller-scale plucking machines are often homemade and require a spinning component, plucker fingers, and a feather catching compartment (A. Duran, Personal

Communication, November 20 2015). Pluckers at this size can usually process three to six birds at a time, with total or near defeathering being completed in one to two minutes (A. Duran, Personal Communication, November 20 2015).

### **Manufacturing Information of the Product:**

Presently, there aren't many defeathering machinery manufacturers in Canada. CG Manufacturing is one of the few Canadian poultry equipment companies that not only supplies but also manufactures chicken finger pullers (A. Duran, Personal Communication, November 20 2015). Due to the strategic partnerships that CG Manufacturing has with other manufacturers around the world, other options exist that may be cheaper or more efficient than producing the product in Canada (CG Manufacturing, 2015).

### **Inputs, Technology, and Machinery Required:**

Rubber plucker fingers are produced in a similar way as many rubber products this being via rubber injection molding (Lindsay, 2012). This molding process requires many different inputs to create a commercial product of either natural rubber (NR) or styrene-butadiene rubber (Lindsay, 2012). Being a mechanised procedure, there are clear electric energy requirements in order to make rubber units since there is a heating and cooling process involved (Lindsay, 2012). Water and microcrystalline waxes are needed in the manufacturing of rubber-moulded products as well (Lindsay, 2012). Modern injection molding machines are quite expensive, thus they require high volumes of production in order to maintain their economic viability (Lindsay, 2012). Due to the input requirements, exporting the investigated product to Nepal will only be viable if

there is enough demand for the product; if the consumer interest is too little, the cost will outweigh the potential benefits to Canada (A. Duran, Personal Communication, November 20 2015).



Source: Qingdao Xinchengyiming Rubber Machinery Co., Ltd.

**Figure#4:** An image depicting a rubber injection-moulding hydraulic press machine.

#### **Benefits to Canada and Market Opportunity:**

Many potential benefits exist when evaluating the exportation of chicken plucker fingers from Canada to Nepal. Firstly, Canada could benefit from the export through the benefits to the Canadian company CG Manufacturing. If the product were successfully implemented in Nepal, there would be revenue generated for CG Manufacturing, as they would be selling their product (Industry Canada, 2006). With proper establishment, CG could begin a new trade relationship with the poultry processors and improve their international representation (Government of Canada 2012). If there were a demand for chicken pluckers and plucker fingers in Nepal, there would also be the potential to increase the supply in Canada in order to meet the market demands in Nepal (Industry

Canada, 2006). To meet this increased supply, there may need to be increases in production productivity resulting in the potential creation of new jobs for Canadians in the manufacturing industry (Stats Canada, 2015). If a company such as CG Manufacturing was able to insert itself into an international export foreign market, it is possible that it can facilitate the opening of new markets and trade agreements between other Canadian businesses, which would further profit for Canada (Government of Canada 2012).

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## **PART II: EXPORT POTENTIAL TO NEPAL:**

### **Brief Introduction to Nepal:**

Nepal is a country located between China and India in Southern Asia; its capital city is Kathmandu (Dodds, 2008). The country has a population of 28.17 million people and one third of its recorded gross domestic product (GDP) is generated through agriculture (World Bank, 2014). 87% of the Nepali population lives in rural areas this is substantially higher when compared to the rest of the world that has 41% of its population in rural areas (Devkota et al., 2012). Based on world development indicators, Nepal is considered to be an under-developed nation, as life expectancy is 68 years old, the income level is low, and there have been consistent rises and falls in annual GDP growth (World Bank, 2014). Culturally, Nepal has approximately 125 distinct ethnic groups and 123 languages that have been classified as “mother tongue” languages (The World FactBook, 2011). The primary religion practiced in Nepal is Hinduism that consists of 81.3% of the population; Buddhism follows this at 9% then Islam at 4.4% (The World FactBook, 2011). It is important to state that even while being considered a developing nation, there has still been great improvement in Nepal in recent years. The life expectancy in Nepal has steadily increased since 2010, there has been a vast increase in the number of students that are being enrolled in primary schooling, and increases in the gross national income (GNI) per capita (World Bank, 2014).

### **Poultry Industry in Nepal:**

Nepal is ranked 112<sup>th</sup> in chicken meat production and of the 33.7% of the GDP that is contributed by agricultural, 3.5 % of this comes from the poultry industry (Food

and Agriculture Organization of the United Nations, 2014). The national poultry flock in Nepal includes chickens, ducks, pigeons and many other birds that are maintained in a variety of production systems (Food and Agriculture Organization of the United Nations, 2014). There has been substantial growth in the Nepali poultry industry; in 2002, the country had 21.37 million poultry birds, and 45.17 million birds in 2012 (Food and Agriculture Organization of the United Nations, 2014). With this increase in the sheer volume of poultry birds, the nation has evolved from being majorly based on subsistence farming to a valid competitive commercial market (Food and Agriculture Organization of the United Nations, 2014). Currently many parent broilers are imported from India and raised and processed in Nepal (Food and Agriculture Organization of the United Nations, 2014). There are more than 1,000 broiler farms, 98 hatcheries, 111 feed industries, and 70,000 direct and recorded employees in the industry (Food and Agriculture Organization of the United Nations, 2014). The demand of poultry meat in Nepal has risen to 150,000kg/day and 1,170,573 broilers are produced weekly (Food and Agriculture Organization of the United Nations, 2014).

<b>Distribution of poultry by physiographic region</b>						
Districts	Chickens		Ducks		Total	
	Numbers	%	Numbers	%	Numbers	%
Mountain	2 035 560	5.14	10 108	2.7	2 045 668	5.13
Hill	19 858 568	50.25	93 832	24.8	19 952 400	49.99
Terai	17 636 492	44.61	274 110	72.5	17 910 602	44.88

Source: Statistical information on Nepalese agriculture 2010/11

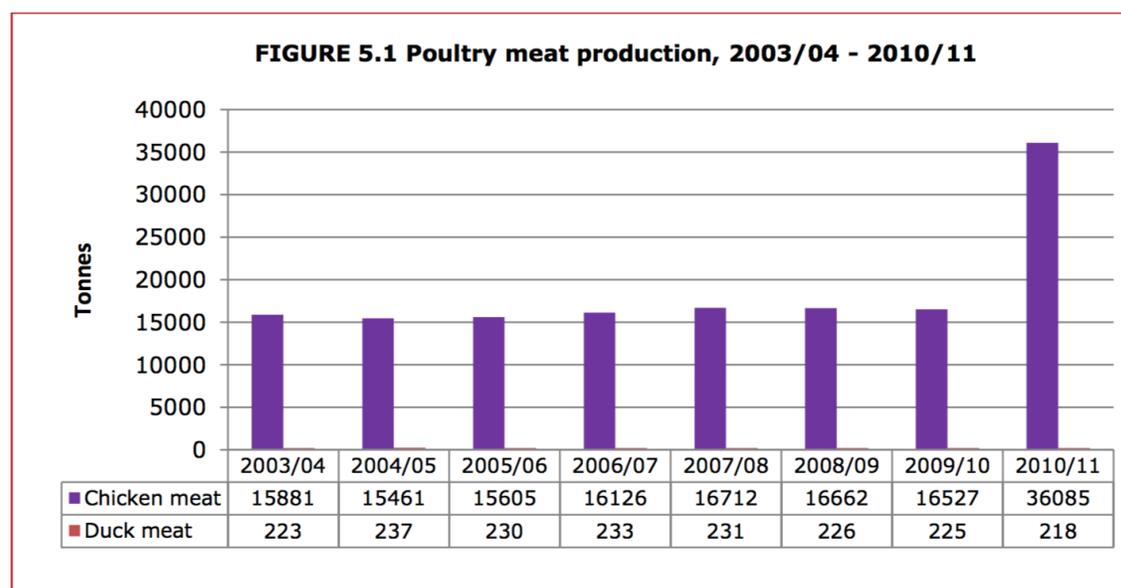
**Figure #5:** The distribution of poultry (chicken and ducks) via physiographic region, showing the number of birds and percentage of birds in the mountain, hill and Terai regions.

**Distribution of backyard and commercial poultry in districts with large populations**

Districts	Backyard		Commercial		Total	
	Numbers	%	Numbers	%	Numbers	%
Pokhara	126 980	9.65	918 327	21.86	1 045 307	18.94
Chitwan	132 892	10.1	1 932 674	46	2 065 566	37.43
Biratnagar	898 522	68.26	259 958	6.19	1 158 480	21
Kathmandu	17 880	1.36	1 720 611	40.95	35 760	31.51
Bhaktapur	80 000	6.08	860 000	20.47	940 000	17.04
Lalitpur	60 000	4.56	212 655	5.06	272 655	4.94
Total	1 316 274		5 904 225		7 220 499	

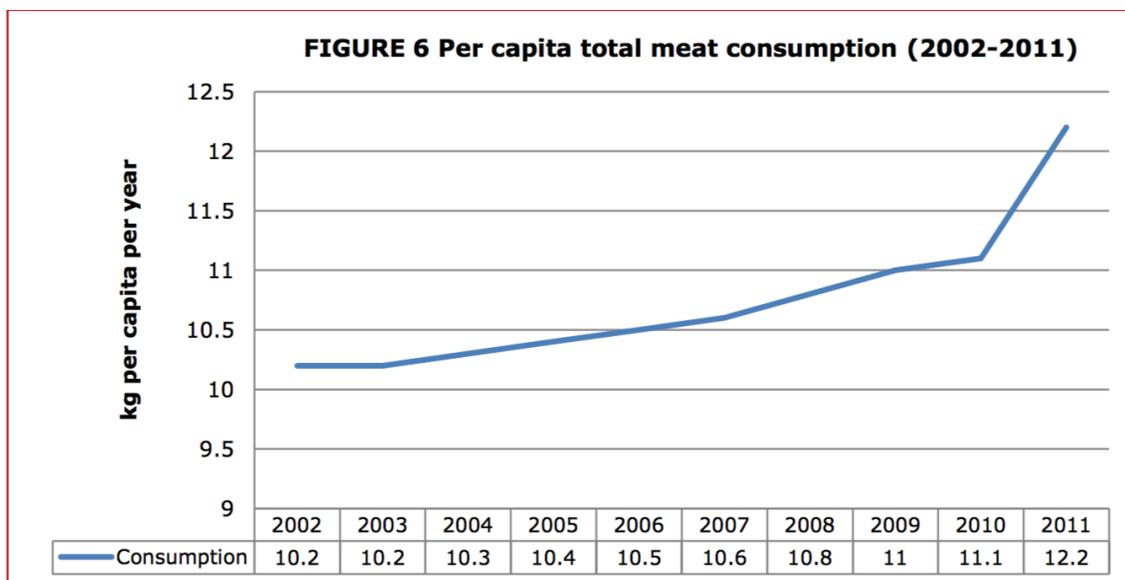
Source: District livestock services offices, Annual Progress Report, 2008/09

**Figure #6:** The distribution of poultry for backyard and commercial purposes between specific districts.



Source: Statistical information on Nepalese Agriculture 2010/11

**Figure #7:** A bar graph depicting the amount (tonnes) of chicken and duck poultry meat production from the year 2003- 2011.



Source: Food and Agriculture Organization of the United Nations (FAO) 2014

**Figure #8:** The illustrated change and increase of meat consumption within Nepal from 2002 to 2011.

**Benefits of Product Implementation into Nepal:**

With considerable increases in the number of poultry birds and per person poultry meat consumption in Nepal's last decade, there would be benefit to some Nepali producers to have rubber chicken feather plucker fingers (Food and Agriculture Organization of the United Nations, 2014). When the industry of Nepal was examined, it was clear that many inputs have become more intense over the last few years; this includes the number of imported broilers and the number of Nepali hatcheries (Food and Agriculture Organization of the United Nations, 2014). Because the commodity volume has increased, in order to add value to the product, farmers could use rubber plucker fingers to increase defeathering speed (A. Duran, Personal Communication, November 20 2015). The commercial sectors in Nepal that could potential benefit from plucker finger implementation are the low live urban commercial producers and the village or backyard producers (Food and Agriculture Organization of the United Nations, 2014). This is because these two sectors not only require government extension inputs but because they are the producers that currently do not have industrial plucking machines (Food and Agriculture Organization of the United Nations, 2014). Rubber feather plucker fingers can be used on much different type of poultry birds (CG Manufacturing, 2015). Since many native birds are produced at the village level, this is very important, and thus these birds could be processed with homemade pluckers that utilize plucker fingers (Food and Agriculture Organization of the United Nations, 2014). This outlined benefit also applies to market birds such as ducks, which are consumed on special religious and cultural occasions (Food and Agriculture Organization of the United Nations, 2014). The two sectors that would benefit from plucker finger implantation would also benefit as

plucker fingers could help increase the rate of biosecurity. This is because using a plucker finger can be more sanitary than plucking by hand or with a non-mechanised defeathering tool (CG Manufacturing, 2015). The predominate reason as to how plucker fingers would benefit small Nepali farmers, is that the product would give farmers the ability to add value to their product and thus cut out the middleman and increase revenue (Food and Agriculture Organization of the United Nations, 2014).

### **Transport Logistics:**

Transportation Region	Transportation from CG Manufacturing
Ontario, Canada	<p><b>From 190 Turnbull Court, Unit #7 Cambridge, Ontario → 111 Flint Road Unit 22 Toronto, Ontario via FedEx:</b>  **20 boxes containing 250 chicken plucker fingers each, 18kg/box, 45cm x 45cm x 30cm  = 5,000 plucker fingers total  <u><b>Transportation Service: FedEx Ground ®</b></u>  Total Rate= \$422.0 CAD</p>
Canada to India	<p><b>From 111 Flint Road Unit 22 Toronto, Ontario → Calcutta, India via A1Freight Forwarding:</b>  **20 boxes containing 250 chicken plucker fingers each, 18kg/box, 45cm x 45cm x 30cm  = 5,000 plucker fingers total  <u><b>Ocean Freight:</b></u>  <u><b>Total cost= \$335.51 USD</b></u></p>
Calcutta, India to Kathmandu, Nepal	<p><b>From Calcutta, India → Kathmandu, Nepal via FedEx Export:</b>  **20 boxes containing 250 chicken plucker fingers each, 18kg/box, 45cm x 45cm x 30cm  = 5,000 plucker fingers total  <b>FedEx Export:</b>  <b>301Kg x 350 India rupees (INR) per Kg = 360kg x 350= 126000 INR</b></p>
Total (CAD)	= 422.0 + 447.85 + 2531.74 = \$3401.59

**Figure#9:** *Estimated cost of transportation required in the shipping of the plucker fingers to Nepal. Quotes generated from the sources FedEx and A1Freight Forwarding.*

Further cost still exists in the precise distribution methods that could occur once the product reaches Kathmandu. The pluckers could be distributed by FedEx, in the rural areas of Nepal through markets; farm equipment supply stores or to farms directly.

**Import/Export Documentation Required:**

MANDATORY DOCUMENTS FOR EXPORT & IMPORT		
S. No.	EXPORTS	IMPORTS
1	Bill of Lading/ Airway Bill	Bill of Lading/ Airway Bill
2	Commercial Invoice cum Packing List	Commercial Invoice cum Packing List
3	Shipping Bill/ Bill of Export	Bill of Entry

**Source: Press Information Bureau Government of India, Ministry of Commerce and Industry 2015**

**Figure#10: A table showing the required documents for export and imports mandated by the Indian Government**

MANDATORY DOCUMENTS LISTED BY WORLD BANK IN DOING BUSINESS REPORT 2015		
S. No.	EXPORTS	IMPORTS
1	Shipping Bill	Bill of Entry
2	Commercial Invoice	Commercial invoice
3	Packing List	Packing List
4	Bill of Lading	Bill of Lading
5	Foreign Exchange Control Form (SDF)	Foreign Exchange Control Form (Form A-1)
6	Terminal Handling Receipt	Terminal Handling Receipt
7	Technical Standard Certificate	Certified Engineer's Report
8		Cargo Release Order
9		Product manual
10		Inspection report

**Source: Press Information Bureau Government of India, Ministry of Commerce and Industry 2015**

**Figure#12: A table showing the necessary documents required by the World Bank mandated by the United Nations.**

**Competition:**

When implementing rubber poultry plucker fingers into Nepal by exporting it from Canada, the competition that could exist with this product must be considered. Within Nepal the economic condition and industrial capacity of the nation currently is not strong enough to compete with Canada through the production of this product (Dodds, 2008). This means no major Nepalese companies would be competing against Canadian companies in the market of rubber chicken feather plucker fingers. However, major regional competitors that would be better integrating the product into Nepal are manufactures and suppliers in China. China has been able to produce manufactured products for a lower cost and sell these products at a lower price when compared to Canada (Much, 2011). China also stands as competition because it is geographically closer to Nepal; the country borders Nepal and is over 10,000 km closer to the Nepal than when compared to Canada (The World FactBook, 2011). The current international relationships and trade relations with Nepal are arguably strong that that of Canada and Nepal, being that the nations have proudly celebrated there long lasting development affiliation consistently (Chinese Embassy, 2012).

**Potential Harm of Product Implementation:**

Though there are evident potential benefits for Nepal if rubber chicken plucker is imported from Canada before implementation, it is essential to investigate the potential harm that this product may have on the country. Firstly, chicken-plucking technology further exacerbates the westernization and devaluation of religions in Nepal (Furr, 2005). This is because meat-processing equipment correlates to the consumption of meat, which went against cultural norms in the Nepali society until recent years due to religious food

restraints (Food and Agriculture Organization of the United Nations, 2014). With the target buyers of this product being smaller farmers, it might be irrelevant and therefore a waste of an input. Noted in Figure#1 that the value of a single plucker finger being at 75 Canadian cents, this value would be around 60 Nepalese rupees (NR). Because a minimum of two to three plucker fingers are need the value of the product without any consideration of transportation or retail prices would be 120-180 NR. This can be considered expensive and would only add value to individual farms if they were processing a suitable number of birds. The final and most prominent potential harm that exists is the elimination of common Nepal jobs. Within many small-scale poultry operations in Nepal most of them require hand plucking, which is a service that can be done for part-time employment. Similarly, some slightly larger commercial operations also still use some hand on poultry processing (Food and Agriculture Organization of the United Nations, 2014). This is important to consider additions of any processing machinery or technology to Nepal as they may eliminate work opportunities.

### **Conclusion:**

Though the poultry industry in Nepal is growing, deficient national policies and economic polarity have made it hard to make drastic improvements to the industry (Food and Agriculture Organization of the United Nations, 2014). In this investigation, the potential of chicken plucker fingers has been explored as an export from Canada to Nepal. As an export product there are clear benefits to Canada through the new employment, increased trade relations, and revenue generated for Canadians and Canadian companies. Yet, when considering the cost and transportation requirements it

may not be best for the Nepali farmers to purchase rubber chicken plucker fingers.

Though the product could increase defeathering efficiency on smaller farms, the impact that having a mechanised plucker is not significant without a large volume of poultry birds. The implantation of more pluckers in Nepal may harm the job market for many men and women in Nepal. Without some changes to Nepal's economic and agricultural system as well as changes to the cost, production, and transportation, Canadian rubber chicken plucker finger, the product has the potential to harm the sustainable agriculture practices in Nepal.

**Word Count: 3128**

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