

### Contents

# 0, \$\$ar\* and conc), sions

**5!** is

'ariffs ) nder \*DC-specific mar et access schemes and defa) It schemes

Prod, ct	<b>A</b> 0	2an/)ades!	Canada
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i\$')e\$ented t! e o6)i/ations, nder its ter\$s o" accession and t!, s, t! e /rad, ation "ro\$ t! e LDC cate/or\* is, n)ike)\* to res, )t in si/ni"icant direct i\$')e\$entation cost.

### 1. 2ack/ro, nd sco' e and so, rces

(t its 2015 triennia) re.iew o" t!e )ist o" )east de.e)o' ed co, ntries HLDCsI, t!e Co\$\$ittee "or De.e)o' \$ent Po)ic\* HCDPI considered Ne' a) e)i/i6)e "or /rad, ation "ro\$ t!e LDC cate/or\* "or t!e "irst ti\$e, as it \$et t!e!, \$an assets inde% and econo\$ic.,)nera6i)it\* inde% criteria, w!i)e re\$ainin/ as a)ow inco\$e co, ntr\* Hsee t!e 6o%I.¹ 2ased on t!e 2015 triennia) re.iew o, tco\$e, t!e Co\$\$ittee re+, ested t!e De' art\$ent o" Econo\$ic and Oocia) (""airs HDEO(I to 're' are an e%ante i\$' act assess\$ent o" t!e)ike)\* conse+, ences o" /rad, ation "or Ne'a).² 5!e i\$' act assess\$ent is , ndertaken as an in', t to t!e triennia) re.iew in 2018 in con>, nction wit!, and as a s, '')e\$ent to, t!e re' ort on Ne'a).\$\sim \cdot\; nnera6i)it\* 'ro"i)e w!ic! is 're' ared 6\* t!e United

"inancia) \$arkets; and \$ore , r/enc\* and wi))in/ness to ado' t'o)icies to trans"or\$ t! e econo\$\* toward \$ore e""icient reso, rce a))ocations. 5! e si/ni"icance o" t! ese "actors "or indi.id, a) co, ntries and t! eir conse+, ences "or econo\$ic /rowt! and de.e)o' \$ent can c, rrent)\* not 6e re)ia6)\* esta6)is! ed and +, anti"ied. 5! ere"ore, t! e\* are not addressed in t! e assess\$ent.

Main so) rces# 0o, rces, sed in t! is assess\$ent inc), de o""icia) data, re)e.ant doc, \$ents and st, dies', 6)is! ed 6\* t! e /o.ern\$ent, re/iona) and internationa) or/anisations and ot! er re)e.ant instit, tions. &n"or\$ation was s'eci"ica))\* re+, ested "ro\$ t! e \$ain de.e)o' \$ent and tradin/'artners o" a)) LDCs to 6e considered "or /rad, ation 6\* t! e CDP in 2018 on s, ''ort \$eas, res, inc), din/t! e a\$o, nt and/or t\*' e o" 're"erences, 6ene"its and assistance, as we)) as on t! e)ike)\* c! an/es in t! ose s, ''ort \$eas, res s! o,)d t! e co, ntr\* /rad, ation 6e con"ir\$ed.7 UN DEO( is .er\* /rate",) to t! ose -o.ern\$ents and instit, tions t! at 'artici' ated and contri6, ted to t! is e%ercise.

5!e dra"t re' ort o" t!e e%-ante i\$' act assess\$ent was circ,)ated to t!e -o.ern\$ent o" Ne' a) " N%e /rnt64(t

#### 20% 1. -rad, ation e)i/i6i)it\* and t!e 'rocess towards /rad, ation

(co, ntr\* 6eco\$es eli"ible "or /rad, ation "ro\$ t!e LDC cate/or\* w!en it \$eets an\* t7o of three criteria in two consec, ti.e triennial revie7s cond, cted 6\* t!e CDP. &n t!e 2018 re.iew, t!e criteria are as "o))ows4

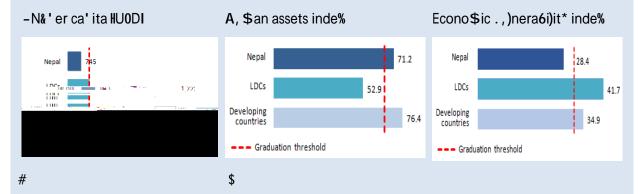
-N&' er ca' ita o" U0D 1,210 or a6o. e Ha)so re"erred to as t! e inco\$e t! res! o)dl

A, \$an (ssets &nde% o" 66 or a6o.eD

Econo\$ic?,)nera6i)it\* &nde% o" 12 or 6e)owD

()ternati.e)\*, a co, ntr\* \$a\* 6eco\$e e)i/i6)e "or /rad, ation i" its -N& 'er ca' ita is \$ore t! an do, 6)e t! e inco\$e t! res! o)d d, rin/ two consec, ti.e re.iews.

Nepal8s eli"ibility# (t t!e 2018 re.iew, Ne'a)s - N&'er ca' ita is U0D E75, we)) 6e)ow t!e /rad, ation t!res!o)d. &ts!, \$an assets inde% HA(& score o" E1.2 e%ceeds t!e /rad, ation t!res!o)d and its econo\$ic.,)nera6i)it\* inde% HE?& score o" 28.7 re\$ains 6e)ow t!e \$a%i\$, \$ t!res!o)d. eetin/t!e E?& and A(& criteria is s, ""icient "or Ne'a) to!a.e \$et t!ee)i/i6i)it\* criteria "or t!e second consec, ti.e ti\$e.



he proc03.13004(-)-1.95644(t) 3.13004(C)-2.26095(v) 3.13004(t) 3.13004(x)-2.30408(r)-0.26139() 3.13004(C)

# 2. 0, '' ort \$eas, res re)ated to trade

### 2.1 Ne'a) e%' ort4 an o.er.iew

Ne'a) secono \$\* is c! aracteri=ed 6\* a) ar/e trade de"icit and trans"er s, r'), s lta6) e (.11. &t trade de"icit reac! ed a) \$ ost 70 'er cent o" -DP in 2015. #e\$ittance in") ow, on t! e ot! er! and, was as ) ar/e as 10 'er cent o" -DP, co\$'ensatin/t! e de"icit in trade. : ro\$ 2003 to 2015, w!i) e e%' ort rose on) \* 6\* 20 'er cent "ro\$ M0.8 6i)) ion to M1 6i)) ion, i\$'orta) \$ ost do, 6) ed, en) ar/in/t! e trade de"icit to M8.5 6i)) ion. &n t! e sa\$e 'eriod, c, rrent trans"ers, \$ ost o" t! e\$ 6 ein/ workers re\$ittances a) so do, 6) ed "ro\$ M1.1 6i)) ion to M6.6 6i)) ion. Oer. ices e%' ort s! ow a s\$a)) s, r'), s, wit! to, ris\$ acco, ntin/"or a si/ni" icant 'art o" t! e recei' ts.

#### E%istin/ \$a>or e%' ort sectors

:i/, re 1 'resents t!e to' 10 \$a>or e%' ort co\$\$odities o" Ne' a), identi"ied 6\* t!e tota) e%' ort a), es o.er 2003-2015. 2\* t!e "irst two di/it o" t!e Aar\$oni=ed Co\$\$odit\* Descri' tion and Codin/ 0\*ste\$s 2012, so-ca))ed Fc! a' terG o" /oods, iron and stee) HA0 E2I was t!e to' e%' orts, acco, ntin/ "or a6o, t 10.1 'er cent o" tota) e%' orts in t!e ti\$e 'eriod. Car' ets HA0 5EI \$ade, '8.1 'er cent o" tota) e%' orts. Co""ee and tea HA0 03I, \$an-\$ade sta')e "i6res HA0 55I, \$an-\$ade te%ti)e \$ateria)s HA0 57I, and a' 'are) and c)ot! in/ accessories HA0 62I acco, nted "or a6o, t E' er



was , 'dated in 2016, as t!e N5&0 2016, and identi"ied a n, \$6er o" 'otentia) 'riorit\* 'rod, cts, inc), din/oi) and !er6, )eat! er, and "ootwear, as we)) as ser. ices )ike &5 and to, ris\$.6

UN DEO(!as co\$\$issioned a n, \$6er o" -rowt! &denti"ication and :aci)itation : ra\$ework H-&:: I st, dies on 'rod, cti.e ca' acit\* in LDCs, to identi"\* 'otentia) sectors to contri6, te to ac! ie. in/s, staina6)e de.e)o' \$ent. 5! e - &:: st, d\* "or Ne'a) H201EI s, //ests s, itcase, 'a' er and ')astic \$an, "act, rin/ as additiona) 'otentia) e%' ort sectors. E

9t! er internationa) or/ani=ations a)so s, //est a "ew 'riorit\* e%' orts "or Ne' a). Otandards and 5rade De.e)o' \$ent :aci)it\* H05D: I "oc, ses on s, '' ortin/ Ne' a) in de.e)o' in/ ca' acit\* to \$eet t! e standard re+, ire\$ent "or "ood 'rod, cts, es' ecia))\* /in/er. 8 United Nations &nd, stria) De.e)o' \$ent 9r/ani=ation HUN&D9I identi"ies a n, \$6er o" 'rod, cts in t! e a' 'are) and car' et sectors and 'ro' oses ind, stria) 'o)icies to 'ro\$ote e%' ort. 3 &nternationa) 5rade Center se)ects 'ro\$isin/ e%' ort 'rod, cts "or e%' ort 'ro\$otion acti.ities, 6ased on E%' ort Potentia) (ssess\$ents HEP(sI, a data-6ased \$et!odo)o/\*. 10 ()so, t! e -o.ern\$ent o" Ne' a) and &5C ', 6)is! ed sector e%' ort strate/ies to red, ce non-5ari"" 6arrier to rea)i=e 'otentia)s in carda\$o\$, co""ee, tea, and 'a' er 'rod, ct e%' orts. 11 E, ro' ean Econo\$ic C! a\$6er o" Co\$\$erce, 5rade and &nd, str\* )ooked into a "ew sectors to "ind e%' ort 'otentia)s in Ne' a). 12 Oee ta6)e (.1 "or t! e detai)ed )ist o" re' orts and 'riorit\* 'rod, cts.

:ro\$ t! ose strate/ies and researc!, we identi"\* si%additiona) e%' ort 'rod, cts wit!!i/! 'otentia)4 9i) and !er6 HA0 12I; P)astics HA0 13I; #aw !ides HA0 71I; (rtic)es o")eat! er HA0 72I; Pa' er HA0 78I; and :ootwear HA0 67I. 5! ese 'rod, ct /ro, 's are inc), ded in t! e 'ro\$isin/'rod, cts in4il t! e D5&0 2016 U' date and at)east one ot! er st, d\*; or iiI DE0(< -&: st, d\*. (s 'resented in ta6)e (.2,

cor t!e 'rod, cts w!ic! !a.e 6een identi"ied in t!e 're.io, s section, we ana)\*=e t!e tari""s t!at are a""ected or not a""ected 6\* t!e 'ossi6)e /rad, ation "ro\$ t!e )ist o" LDCs. Ne'a) !as 6een e%' ortin/ to \$ain destination \$arkets t!ro, /! .ario, s 're"erentia) tari"" re/i\$es llta6)e (.71. 0!o, )d Ne'a) /rad, ate, it \$a\* )ose access to so\$e o" t!e LDC 're"erentia) sc!e\$es and 6eco\$e e)i/i6)e "or ot!er tari"" re/i\$es llre/, )ar -0P, :N, etcl i\$\$ediate)\* or wit! so\$e transition 'eriod. Ne'a) wi)) kee' !a.in/ access to e%istin/6i)atera) and re/iona) sc!e\$es, inde' endent o" its LDC stat, s.

5a6)e 1 s, \$\$ari=es t! e 6est a.ai)a6)e a.era/e tari""s on Ne' a) e%' orts, to 6e i\$' osed 6\* \$axor and 'otentia) tradin/ 'artners "or t! e a6o.e-\$entioned to' 10 e%' orts and 6 'otentia) e%' orts, 're-, and 'ost-/rad, ation. axor tradin/ 'artners, s! aded ce))s, are t! e )ar/e i\$' orters w! ic!, c, \$,)ati.e)\*, acco, nt "or \$ore t! an 80 'er cent o" t! e tota) e%' ort o" t! e 'artic,)ar 'rod, ct. 0i\$')e a.era/es o" a)) tari"" )ines at t! e two-di/it A0 code are 'resented as t! e \$ain res,)t.:or t! e cases w! ere tari"" rates .ar\* at a \$ore detai)ed 'rod, ct )e.e) 're- and 'ost-/rad, ation, ", rt! er disc, ssion, sin/ detai)ed 'rod, ct codes, "or e%a\$')e, at t! e si%-di/it, is 'resented in t! e te%t. 5! e "irst n, \$6er in a ce)) re' resents t! e 6est 'ossi6)e tari"" "or Ne' a) as an LDC. 5! e second "i/, re is t! e 6est 'ossi6)e tari"" "or Ne' a) as a non-LDC. #ed "i/, res 'resent 'ossi6)\* )ar/e tari"" \$ar/in)osses "or 'otentia) e%' ort 'rod, cts "ro\$ a /rad, ation. 5!, s, red "i/, res in a s! aded area "or 'rod, cts in 6o)d wo,)d re' resent a si/ni"icant i\$' act e%' ected "ro\$ a /rad, ation on t! e c, rrent \$axor e%' ort sector in \$ain destinations.

'able /# (mport tariffs on prod)cts exported by Nepall 7ith and 7itho)t \*DC preferential treatment120/4

Prod, ct	A0	2an/)ades!	Canada	C! ina	EU	&ndia	<b>@a'</b> an	5, rke*D	U0(
\$dible ve"etables	0+	, #2- , #2	0#0#0	0#0-//#2	0#0#0	0#0-0#0	0#0-00#.	20#2-20#2	0#+ <b>-0</b> #0
Coffee1 tea1 and spices	0.	/0#0-/0#2	0#0-/#0	0#0-/0#3	0#0-/#0	0#0-0#0	0#0-/#,	0+#3-0+#3	0#0-0#/
Preparations									
of ve"etables	20	/2#+-/2#+	0#0-/2#/	/#0-2/#0	0#0-/2#/	0#0-0#0	0#0-/4#2	43#3-43#,	2#0-4#4

## Potentia) i\$' act o" /rad, ation on di. ersi"ication

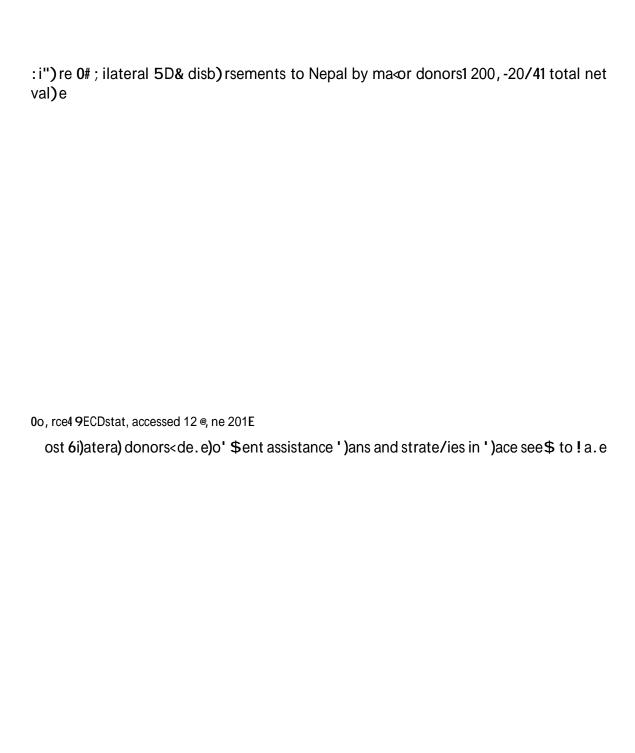
• Ne'a) \$a\* 6e constrained in di. ersi"\*in/ into ot! er \$arkets w! en 're"erentia) tari""s

ca' acit\* "or t!e i\$')e\$entation o" t!e a/ree\$ent to re+, est tec! nica) assistance and s, '' ort "or ca' acit\* 6, i)din/.

(s an LDC, Ne'a) can cate/ori=e 5: ('ro.isions in Cate/or\* (Hi\$')e\$ent wit! in one \*ear a"ter t!e a/ree\$ent<sentr\* into "orcel, Cate/or\* 2 Hi\$')e\$ent a"ter a transitiona) 'eriod "o))owin/ t!e entr\* into "orce o" t!e a/ree\$entl or Cate/or\* C Hi\$')e\$ent a"ter a transitiona) 'eriod "o))ow1(i(n)-5(/)1()-213.9155(!)5(e)-78(i756()-104(a)42(n)5(t)-5(r)-1(\*)3() AND(A)114(a)29(3)15(b)414(a)49(a)42(n)5(t)-1(i!)

t!e 5#&P0 (/ree\$ent and P, 6)ic Aea)t!, inc), din/t!e '!ar\$ace, tica)-s'eci"ic transition 'eriod.<sup>70</sup>

(s a res,)t, /rad, ation wo,)d not i\$'act its /enera) o6)i/ations , nder t!e 5#&PO a/ree\$ent, as Ne'a) wai.ed t!e ri/!t "or an e%tended /enera) transition 'eriod in t!e accession 'acka/e. Conse+, ent)\*, Ne'a)\$ /rad, ation is , n)ike)\* to res,)t in si/ni"icant direct i\$')e\$entation costs. Aowe.er, a"ter /rad, ation Ne'a) wo,)d )ose access to t!e s'eci"ic transition 'eriod "or '!ar\$ace, tica)s and wo,)d !a.e to inc), de t!e '!ar\$ace, tica) sector into its &P# re/i\$e. 5! is \$a\* ne/ati.e)\* a""ect Ne'a)\$ a6i)it\* to 'rod, ce and i\$' ort /eneric .ersions o" 'atented \$edicines. Ne'a) wo,)d a)so)ose access to recei.e tec!no)o/\* trans"er , nder (rtic)e 66.2 o" t!e 5#&PO a/ree\$ent, t!o, /! it is not



t! e 0D - ac! ie. e\$ent as a "ra\$ework "or LDC /rad, ation, increasin/ resi)ience to s! ocks, ' ost-/rad, ation "inancin/ \$ec! anis\$s, and trade "aci)itation.

Ne' a) is , n)ike)\* to 6e on a s, stained /rowt! 'at! and a6)e to /enerate eno, /! reso, rces "or de.e)o' \$ent i\$\$ediate)\* a"ter /rad, ation, t!e EU con"ir\$ed t! at s'eci"ic sit, ations and .,)nera6i)ities are e%' ected to 6e considered.

UN s\*ste\$ as a w!o)e is an i\$' ortant \$, )ti)atera) 'artner "or Ne'a) in 2015, !a.in/dis6, rsed M111.6 \$i))ion.<sup>58</sup>

&n s, \$, aid "ro\$ \$ost \$,)ti)atera) 'artners is not associated wit! Ne'a) <> LDC stat, s, and t! ere"ore t!e /rad, ation wo,)d !a.e \$ini\$a) i\$'act on t!e de.e)o' \$ent coo' eration "or Ne'a). Ne'a) wi)) )ose access to LDC:, 6, t re\$ain e)i/i6)e "or ot!er c)i\$ate-re)ated "inancin/so, rces. ("ew UN entities and internationa) or/ani=ations ')an to initiate and i\$')e\$ent o' erations to s,' 'ort Ne'a) <> s\$oot! transition.

					not )ike)*. 0ee te%t a6o.el
9PC8	2ased on UN sca)e o" assess\$ents ad>, sted to entit* \$e\$6ers! i'	Cei)in/ o" 0.01R	0.006R	0.006R	No i\$' act
UNE0C9	2ased on UN sca)e o" assess\$ents ad>, sted to entit* \$e\$6ers! i'	Cei)in/ o" 0.01R	0.006R	0.006 <b>R</b>	No i\$' act
UN&D9	2ased on UN sca)e o" assess\$ents ad>, sted to entit* \$e\$6ers! i'	Cei)in/ o" 0.01R	0.006 <b>R</b>	0.006 <b>R</b>	No i\$' act
8A9	2ased on UN sca)e o" assess\$ents ad>, sted to entit* \$e\$6ers! i'	Cei)in/ o" 0.01R	0.006R	0.006R	No &\$' act
8 <b>P</b> 9	(ssess\$ent 6ased on 17 di""erent c)asses o" contri6, tion	0) c)ass	1/12 , nits	1/16 , nits	Contrib)tion increase for 20/+ b)d"et? C@: /1323 (A/1342)

## 7.2 5ra.e) s, ' ' orts and sc! o)ars! i'

5! e United Nations o""ers tra.e) s, ''ort "or , ' to "i.e re'resentati.es o" eac! e\$6er 5(')-5( )-5( )9(( )9(t)aደቂ )#e6iYnātead )e5a(L)ጋር-12( àṭteand )!5e(r)e/1,())ቀጠቂe)ደረሰበ፦ ""() ) -31.4175 813 ()2)(2).-9(t)et5 ()aβ-(1) (1)( ) \$ ((s) 45(4)\$12 M10,000I. 5! e &PCC 0c! o)ars! i' Pro/ra\$\$e awards a \$a%i\$, \$ a\$o, nt o" 15,000 E, ros o" researc! ", nd to sc! o)ars "ro\$ LDCs 'er \*ear "or ,' to two \*ears. 5! ree Ne' a)ese sc! o)ars! a. e 6een awarded "ro\$ 2011 to 201E. 5! ese /rants and s, '' orts do not! a. e transition arran/e\$ents. Aowe.er, \$ost o" t! e researc! /rants and sc! o)ars! i's a))ow a'')ications "ro\$ non-LDCs, and t!, s Ne'a)ese researc! ers are )ike)\* to re\$ain e)i/i6)e "or so\$e o" t! e researc! /rants.

De.e)o' \$ent Coo' eration	2i)atera) ")ows	#ed, ced 9D ( associated wit! LDC stat, s	No indication o" a6r, 't c! an/es "o))owin//rad, ation. Possi6)e c! an/es in t! e "or\$s H-er\$an*I and t! e ter\$s "or t! e )oans Hea' an and Joreal.
	,)ti)atera) ")ows	#ed, ced 6, d/et associated wit! LDC stat, s	

Ne' a)  $\leq$  de' endence on "orei/n aid is si/ni" icant, 6, t  $\circ$  or t! e c, rrent s, ' ' ort wi))) ike)\* re $\circ$  na" ected 6\* t! e co, ntr\*  $\leq$  /rad, ation "ro $\circ$  t! e LDC cat

Ne' a) cond, cted, o.er "i.e' ! ases, a series o" e)ecti

# (nne% & Otatistics

'able &#/# Nepal? balance of payments1 200. -20/4 (c

'able &#2# Nepal ma<or export commodities and main destinations and potential export commodities1 200. -20/4 avera "e1 c) rrent million >SA

Co\$\$odit*	A0	?a), e	0! are IIR o" tota) e%' ortI	5o' destination	?a), e	0! are IIR o" ' rod, ct e%' ortI
\$dible ve"etables	+	16.6	7.1	2an/)ades! 5, rke*	23.1 <b>7</b> .8	E3.5 11.2

### 'able &#0# Catalo") e of priority exports in Nepal

	@S	Prod)cts	<b>@</b> S	S)b-prod)cts			Sc	)rce			
	2di"it		(3-2		D5&0	D5&0	DE0(-	05D:	UN&D9	<b>%5</b> C	EEC
			di"it)			, ' date	-&::				
ĺ	03	Dair* 'rod, ce, e//s	0703	Aone*	В	В					
		and ! one*									

+2	&ron and stee)		В	В		В	
	' rod, cts						
+0	(rtic)es o" iron and		В	В		В	
	(rtic)es o" iron and stee) ' rod, cts						
+3	Co''er		В				
+,							

'able &#3# 'rade preferences for Nepal

&\$'orter	5rade re/i\$es 6e"ore /rad, ation	Co.era/e	E""ecti. e dates o" )atest renewa)	5rade re/i\$es a"ter /rad, ation	0\$oot! transition
2an/)ades!	0(:5(-LDC	()) e‰e' t 1,253 tari"" )ines	1/1/2006-	0(:5(Ha)) e%ce't 1,257 tari"")inesI	Unc)ear. 5! e "or\$er LDC a)di. es sti)) e)i/i6)e "or LDC treat\$ent d, e to a s' ecia) ' ro. ision.
Canada	LDC5	E,181 tari"" )ines #33RI	26/6/2011- 11/12/202 <b>7</b>	-P5 H5,363 tari"")inesl or :N	

Canada? Least De.e)o' ed Co, ntr\* 5ari"" HLDC5I; -enera) Pre"erentia) 5ari"" H-P5I; ost:a.o, red Nation H:NI;

! tt' 4//' tad6.wto.or//docs/CanadaN-0P/2016/C (N (D (R20-0PR20ENR20/, ideR202016R20, 'dateR20 2016-01-11.' d"

!tt'4//www.c6sa-as"c./c.ca/trade-co\$\$erce/tari""-tari"/201E/01-33/co, ntries-' a\*s-en/.' d"

!tt'4//www.c6sa-as"c./c.ca/trade-co\$\$erce/tari""-tari"/20175/01-33/co, ntries-' a\*s-en/.'d"

!tt'4//www.c6sa-as"c./c.ca/trade-co\$\$erce/tari""-tari"/2015/01-33/co, ntries-' a\*s-en/.' d"

Ji\$, Na\$s, k H2015I. #e.iew o" ' re"erentia) \$arket access sc! e\$es "or LDCs.

China? D, t\*: ree 5reat\$ent HD: 5I; ost:a.o, red Nation H: NI;

ble &#4# Nepal? composition and distrib) tion of 5D& flo7s by selected donors1 200, - 1/4 (net disb) rsements in c) rrent prices1 million >S Dollar)

	2006	200E	2008	2003	2010	2011	2012	2011	2017	2015	(.era/e H2006- 2015I	0! are HRI
ors, 5ota)	52E.E	607.7	63E.0	851.8	817.7	886.6	E63.E	8E1.1	881.8	1215.8	812.E	
	115.6											

'able &#+# Nepal? bilateral 5D& by sector and by main donors1 20/4 (commitment in c) rrent prices1 million >S Dollar)

-er\$an\*

#### List o" a66re. iations

CDP Co\$\$ittee "or De.e)o' \$ent Po)ic\*
C5259 Co\$' re! ensi. e N, c)ear-5est-2an 5reat\*
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