



# The cds Paper Products Market Research Report For North & South Trinidad

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**Analysis  
Forecasts  
Implications  
Strategies**



**CARIBBEAN  
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## **The Cds Paper Products Market Research Survey Report**

### **SURVEY STRUCTURE**

The staff of Caribbean Development Syndicate Limited (cds) embarked on the Paper Products Market Research Survey during the months June and July of 2002.

The Paper Products Survey was approached in the following manner:

STEP 1 – Members of Caribbean Development Syndicate Limited’s staff visited all medium–large size supermarkets within a targeted area.

STEP 2 – A personal interview was conducted with the Purchasing Manager / Owner / Floor Manager (as was available). The Interviewee was asked to respond to various questions such as were present on a ‘paper products’ structured questionnaire. These questions ranged in content from queries about restocking interval, quantities purchased and prices paid to satisfaction ratings, product lines purchased and current market environment.

STEP 3 – Whilst the interview was taking place, another member of the Cds staff took note of the shelf prices of the various paper products, which were assorted according to four (4) main categories:

- Bathroom Tissue
- Hand Towel Tissue
- Facial Tissue
- Napkin Tissue

STEP 4 – A representative map was drawn per area, which encompassed all of the supermarkets visited as well as the smaller mini-marts and corner shops.

During the month of June the areas of South Trinidad were covered, and the areas of North Trinidad were covered in the month of July. These areas were as follows:

<b>SOUTH TRINIDAD</b>	<b>NORTH TRINIDAD</b>
Chaguanas	San Juan / Barataria
Couva	El Socorro / Aranguez / Champ Fleurs
Rio Claro	Curepe / St. Augustine / Tunapuna
Princess Town	Tacarigua / D' Abadie / Arouca / Mausica
Avocat / Fyzabad / Siparia	Valencia / Sangre Grande
Gasparillo / Bonne Adventure / Williamsville	Arima
Rousillac / Pt. Fortin	Diego Martin / Petit Valley
Debe / Penal / Barrackpore	Port of Spain
San Fernando	

## RESULTS

### Overall

- For both North and South Trinidad, the total volume of paper products traded per category for the month were as follows:

Bathroom Tissue –	28, 712	Bales
Hand Towel Tissue –	2, 502	Bales
Facial Tissue –	443	Cases
Napkin Tissue –	3, 734	Bales

- The price ranges paid by supermarkets per bale/case for the various paper products were as follows:

Bathroom Tissue –	\$ 40.00 – \$ 59.00
Hand Towel Tissue –	\$ 59.00 – \$ 168.00
Facial Tissue –	\$ 38.00 – \$ 150.00
Napkin Tissue –	\$ 40.00 – \$ 150.00

- The average price paid by supermarkets per bale/case for the various paper products were as follows:

Bathroom Tissue –	\$ 51.00
Hand Towel Tissue –	\$ 95.00
Facial Tissue –	\$ 81.00
Napkin Tissue –	\$ 78.00

- The average price paid by supermarkets per roll of bathroom tissue (280 Sheets) is \$ 1.06.
- In terms of the retail price supermarkets sell a roll of bathroom tissue (280 sheets per roll), the range is between \$ 1.25 and \$ 1.75 per roll.

- Using the average price paid per bale/case and the volume traded, the estimated market value of the various paper products per month are as follows:

	PER MONTH	PER YEAR
Bathroom Tissue –	\$ 1, 464, 000.00	\$ 17, 571,000.00
Hand Towel Tissue –	\$ 238, 000.00	\$ 2, 852, 000.00
Facial Tissue –	\$ 36, 000.00	\$ 431, 000.00
Napkin Tissue –	\$ 291, 000.00	\$ 3, 495, 000.00
<b>TOTAL</b>	<u>\$ 2, 029, 000.00</u>	<u>\$ 24, 079, 000.00</u>

## **South Trinidad**

- For South Trinidad, the total volume of paper products traded per category for the month were as follows:

Bathroom Tissue –	14, 822	Bales
Hand Towel Tissue –	1, 366	Bales
Facial Tissue –	260	Cases
Napkin Tissue –	1,865	Bales

- The price ranges paid by supermarkets per bale/case for the various paper products were as follows:

Bathroom Tissue –	\$ 40.00 – \$ 59.00
Hand Towel Tissue –	\$ 59.00 – \$ 130.00
Facial Tissue –	\$ 38.00 – \$ 150.00
Napkin Tissue –	\$ 48.00 – \$ 150.00

- The average price paid by supermarkets per bale/case for the various paper products were as follows:

Bathroom Tissue –	\$ 51.00
Hand Towel Tissue –	\$ 85.00
Facial Tissue –	\$ 76.00
Napkin Tissue –	\$ 86.00

- The average price paid by supermarkets per roll of bathroom tissue (280 Sheets) is \$ 1.06.
- In terms of the retail price supermarkets sell a roll of bathroom tissue (280 sheets per roll), the range is between \$ 1.25 and \$ 1.75 per roll.
- Using the average price paid per bale/case and the volume traded, the estimated market value of the various paper products per month are as follows:

	PER MONTH	PER YEAR
Bathroom Tissue –	\$ 756, 000.00	\$ 9, 071,000.00
Hand Towel Tissue –	\$ 116, 000.00	\$ 1, 393, 000.00
Facial Tissue –	\$ 20, 000.00	\$ 237, 000.00
Napkin Tissue –	\$ 160, 000.00	\$ 1, 924, 000.00
<b>TOTAL</b>	<b>\$ 1, 052, 000.00</b>	<b>\$ 12, 625, 000.00</b>

### **North Trinidad**

- For North Trinidad, the total volume of paper products traded per category for the month were as follows:

Bathroom Tissue –	13, 890	Bales
Hand Towel Tissue –	1, 136	Bales
Facial Tissue –	183	Cases
Napkin Tissue –	1,869	Bales

- The price ranges paid by supermarkets per bale/case for the various paper products were as follows:

Bathroom Tissue –	\$ 47.00 – \$ 56.00
Hand Towel Tissue –	\$ 60.00 – \$ 168.00
Facial Tissue –	\$ 60.00 – \$ 140.00
Napkin Tissue –	\$ 40.00 – \$ 110.00

- The average price paid by supermarkets per bale/case for the various paper products were as follows:

Bathroom Tissue –	\$ 51.00
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Hand Towel Tissue –	\$ 104.00
Facial Tissue –	\$ 89.00
Napkin Tissue –	\$ 77.00

- The average price paid by supermarkets per roll of bathroom tissue (280 Sheets) is \$ 1.06.
- In terms of the retail price supermarkets sell a roll of bathroom tissue (280 sheets per roll), the range is between \$ 1.25 and \$ 1.75 per roll.
- Using the average price paid per bale/case and the volume traded, the estimated market value of the various paper products per month are as follows:

	PER MONTH	PER YEAR
Bathroom Tissue –	\$ 708, 000.00	\$ 8, 500,000.00
Hand Towel Tissue –	\$ 118, 000.00	\$ 1, 418, 000.00
Facial Tissue –	\$ 16, 000.00	\$ 195, 000.00
Napkin Tissue –	\$ 144, 000.00	\$ 1, 727, 000.00
TOTAL	<u>\$ 986, 000.00</u>	<u>\$ 11, 840, 000.00</u>

The following is a list of the major manufacturers of paper products and the respective brand names that they each produce:

<b>Trinidad Tissues Limited</b>	<b>Ven Caribbean Paper Products Limited</b>	<b>The House Of Paper Products Limited</b>	<b>Premium Paper Products</b>	<b>NCK Paper Products</b>	<b>John Dickinson</b>	<b>Foreign Producers</b>
Tis-U	Softee	Fay	Baby Soft	Refine	Comfy	Velvet
Soft Plus (JTA only)	Savoy	Cushion Soft		Finesse	Snuggle	Majesta
White Cloud	Tenderness	Blossom		So Fresh	Table	Kleenex-Cottenelle
Hi-Dee (Hi Lo Only)	Royale			Saver Soft	Budget	Saversoft
Soft-n-Pretty	Floral			Pride		White Lake
Capri	Anna					Charmin
Soft Weave	Sylk					Classic Touch
	Suave					Andrex
	Lirio					
	Fluffy					
	Soft and Tender					
	Sutil					
	Suave					
	Flair					
	Silky					
	Classic					

The following is a list of the major distributors of the various paper products as stated by the various supermarkets that were interviewed:

- Agostini Marketing
- Marketing and Distribution Limited (M&D)
- Micon Marketing Limited
- NM Ghany Limited
- AM Marketing Company Limited
- Combine Marketing
- John Dickinson
- Media Sales
- Arima Discount Mart (ADM)
- NCK Paper Products
- Zamid Mohammed
- Boss
- Ropa Enterprises
- CWD Enterprises Limited
- The House of Paper Products

# The cds Paper Products Market Research Report



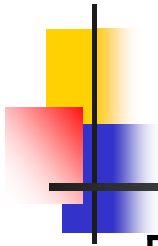
**NORTH TRINIDAD**

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# AREAS DONE

San Juan / Barataria
El Socorro / Aranguéz / Champ Fleurs
Curepe / St. Augustine / Tunapuna
Tacarigua / D' Abadie / Arouca / Mausica
Valencia / Sangre Grande
Arima
Diego Martin / Petit Valley
Port of Spain

**SAN JUAN / BARATARIA**

<b>Supermarket</b>	<b>Contact Information</b>	<b>Product</b>	<b>Restock Interval</b>	<b>Quantity Purchased (Bales)</b>	<b>Wholesale Price (\$)</b>	<b>Markup %</b>
Food Giant Supermarket	xxxx	Bathroom Tissue	Weekly	100	47 - 50	16 - 25%
		Hand Towel Tissue	Weekly	25	95	16 - 25%
		Facial Tissue	Weekly	5	-	16 - 25%
		Napkin Tissue	Weekly	50	-	16 - 25%
Low Cost Supermarket	xxxx	Bathroom Tissue	Weekly	-	-	-
		Hand Towel Tissue	Weekly	-	-	-
		Facial Tissue	Weekly	-	-	-
		Napkin Tissue	Weekly	-	-	-
Jumbo Foods	xxxx	Bathroom Tissue	Weekly	200	44 - 50	1 - 15%
		Hand Towel Tissue	Weekly	-	80 - 103	16 - 25%
		Facial Tissue	Weekly	-	-	16 - 25%
		Napkin Tissue	Weekly	-	-	16 - 25%
Uncle Beddoe's Supermarket	xxxx	Bathroom Tissue	Fortnightly	100	52	16 - 25%
		Hand Towel Tissue	Fortnightly	10	-	16 - 25%
		Facial Tissue	Fortnightly	10	-	16 - 25%
		Napkin Tissue	Fortnightly	10	-	16 - 25%
Ramish & Leela's Supermarket	xxxx	Bathroom Tissue	Monthly	100	54	16 - 25%
		Hand Towel Tissue	Fortnightly	10	-	16 - 25%
		Facial Tissue	-	-	-	16 - 25%
		Napkin Tissue	Fortnightly	50	-	16 - 25%

## Food Giant Supermarket

### Toilet Tissue (All 2 Ply)

Snuggle (280)		
	6 Rolls	8.99
Fay (260)		
	6 Rolls	7.99
	1 Roll	1.29
Tis - U (280)		
	6 Rolls	8.49
	1 Roll	1.29
Giant Foods Supermarket (260)		
	12 Rolls	13.99
	6 Rolls	6.99
Giant Foods Supermarket (400)		
	4 Rolls	8.99
Kleenex Cottonelle (200)		
	4 Rolls	10.29

### Hand Towels

Bounty		
	96 Sheets (2 Ply)	21.59
White Swan		
	2 x 70 Sheets (2 Ply)	10.99
Majesta		
	2 x 40 Sheets (2 Ply)	9.99
White Cloud		
	96 Sheets (2 Ply)	10.99
Scott		
	64 Sheets (1 Ply)	13.99
Tis - U		
	96 Sheets (2 Ply)	8.49

## Food Giant Supermarket

### Facial Tissue

White Cloud	
200 Sheets (2 Ply)	10.99
Kleenex	
175 Sheets (2 Ply)	15.99

### Table Napkins (All 1 Ply)

Fay	
50 Sheets	2.39
Tis - U	
50 Sheets	2.79
100 Sheets	5.49
250 Sheets	13.69
Soft n' Pretty	
100 Sheets	5.49
250 Sheets	12.99
Food Giant Supermarket	
50 Sheets	1.99
100 Sheets	3.99
250 Sheets	8.99
Cosmos	
200 Sheets	7.99

## Low Cost Supermarket

### Toilet Tissue (All 2 Ply)

Soft n' Pretty (280)		
	48 Rolls	66.00
	12 Rolls	17.95
	6 Rolls	8.99
	1 Roll	1.50
Sylk (280)		
	12 Rolls	14.50
	6 Rolls	7.50
	1 Roll	1.50

### Hand Towels

Soft n' Pretty		
	96 Sheets (1 Ply)	7.25
Sylk		
	2 Ply	7.60

### Facial Tissue

Soft n' Pretty		
	100 Sheets (2 Ply)	4.75

### Table Napkins (All 1 Ply)

Sylk		
	50 Sheets	2.50
	100 Sheets	4.60
Soft n' Pretty		
	50 Sheets	2.60
	100 Sheets	4.85
	250 Sheets	11.95

## Jumbo Foods Supermarket

### Toilet Tissue (All 2 Ply)

Soft n' Pretty (280)		
	48 Rolls	56.95
	6 Rolls	7.50
	2 Rolls	2.50
	1 Roll	1.40
White Cloud (400)		
	1 Roll	2.50
Lirio (260)		
	48 Rolls	52.00
	12 Rolls	13.20
	6 Rolls	6.75
	2 Rolls	2.20
	1 Roll	1.10
Syk (280)		
	48 Rolls	54.95
	12 Rolls	14.30
	6 Rolls	6.90
	2 Rolls	2.40
	1 Roll	1.25
Classic (260)		
	48 Rolls	45.00
Fay (260)		
	48 Rolls	55.65

### Hand Towels

Tis - U		
	96 Sheets (2 Ply)	8.45
Majesta		
	2 x 40 Sheets (2 Ply)	7.99
Syk		
	2 Ply	8.45

Bounty		
	64 Sheets (2 Ply)	14.39
Fay		
	100 Sheets (2 Ply)	7.45

## Jumbo Foods Supermarket

### Facial Tissue

Soft n' Pretty		
	100 Sheets (2 Ply)	7.60
White Cloud		
	70 Sheets (2 Ply)	4.90
Tis - U		
	100 Sheets (2 Ply)	8.45
Majesta		
	150 Sheets (2 Ply)	8.99
Kleenex		
	65 Sheets (2 Ply)	7.20

### Table Napkins (All 1 Ply)

Tis - U		
	50 Sheets	2.60
	100 Sheets	5.30
	250 Sheets	13.70
Fay		
	50 Sheets	2.55
	100 Sheets	4.20
	250 Sheets	14.45
Sylk		
	250 Sheets	10.50
Marcal		
	500 Sheets	25.50

## Ramish & Leela Supermarket Ltd.

### Toilet Tissue (All 2 Ply)

Royale (260)		
	12 Rolls	14.10
	6 Rolls	7.40
	2 Rolls	2.50
	1 Roll	1.30
Royale (500)		
	1 Roll	2.25
Fay (260)		
	12 Rolls	14.50
	6 Rolls	8.40
	2 Rolls	2.25
	1 Roll	1.40
White Cloud (400)		
	4 Rolls	10.50

### Hand Towels

So Dri		
	2 x 76 Sheets (2 Ply)	10.75
Mr. Wapo		
	70 Sheets (2 Ply)	6.50
Savoy		
	100 Sheets (2 Ply)	7.50

### Table Napkins (All 1 Ply)

Savoy		
	50 Sheets	1.99
	100 Sheets	3.75
Soft n' Pretty		
	100 Sheets	3.99
Kleen		
	50 Sheets	1.99

## Beddoe's Supermarket

### Toilet Tissue (All 2 Ply)

Soft n' Pretty (280)	
12 Rolls	16.99
6 Rolls	8.99
White Cloud (400)	
4 Rolls	11.99

### Hand Towels

Bounty	
64 Sheets (2 Ply)	13.99
Cushion Soft	
2 Ply	6.30

### Facial Tissue

White Cloud	
70 Sheets (2 Ply)	3.50

### Table Napkins (All 1 Ply)

Fay	
100 Sheets	5.25
250 Sheets	12.99
Soft n' Pretty	
50 Sheets	2.60
100 Sheets	5.25
250 Sheets	12.99

## D & H Supermarket

### Toilet Tissue (All 2 Ply)

Softee (280)	
6 Rolls	9.99

### Hand Towels

Bounty	
96 Sheets (2 Ply)	19.95
White Swan	
2 x 70 Sheets (2 Ply)	13.95
Softee	
100 Sheets (2 Ply)	8.95

### Table Napkins (All 1 Ply)

Softee	
250 Sheets	13.95
Care	
50 Sheets	2.50
100 Sheets	5.50