Dominican Republic

HRI Food Service Sector

Report

2003

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Report Highlights:
The Dominican Hotel, Restaurant, Institutional (HRI) Food Service Sector is an attractive market for imported food and beverages. This Sector provides nearly 30% of the foreign exchange generated by the country. The Dominican Republic is one of the main tourist destinations in the Caribbean.
HOTEL, RESTAURANT, INSTITUTIONAL (HRI) 
FOOD SERVICE SECTOR REPORT

I. MARKET SUMMARY

The Dominican Republic is one of the main tourist destinations in the Caribbean region, with over 49,410 hotel rooms at the end of 2002. From 1994 to 1999, the average annual growth rate was 3,387 rooms or 11.3 percent. The occupancy rate, which is usually steady at about 83 percent, has decreased during the last two years. The average occupation rate in 2001 was 67.3 percent an in 2002, 62.5 percent. This represents a drop of 7.1 percent and is attributed to the dual effect of the September 11th terror attack and the slow U.S. economy. By the end of 2002, more than 2,057,676 foreigners visited the country by air. European tourists comprise 44.6 percent, North Americans, 46 percent (31.6 percent from the United States, 13.5 percent from Canada and 0.9 percent from Mexico); South Americans, 6.2 percent; and Central Americans and Caribbeans 2.9 percent.

The importance of the food service industry has also been influenced by the strong economic growth of the country. Although growth has slowed to an average of 2.5 percent the past two years, it has been one of the best not only in Latin America, but also worldwide, with an average growth rate of 7.6 percent during the last half of the 90's. This, along with changes in the consumption habits of consumers and the increased participation of women in the workforce (implying a greater need for eating out), demonstrates the growth in this sector.

Consumption of food and drinks in the Dominican Republic’s non-tourist sector was estimated at US$700 million. For the tourist sector (all-inclusive hotels) it is estimated that consumption is US$320.2 million. Therefore, it could be estimated that the final value of all food and beverages consumed in the country in the HRI sector is over US$1 billion.

In the restaurant sub-sector, the largest growing area is fast food. Foreign fast food chains, mostly from the United States, started in the Dominican Republic in 1994 and have been very well received by Dominicans. Over 40 of these establishments have been opened, mostly in the cities of Santo Domingo and Santiago. Furthermore, the trend towards eating out has led many local establishments to open small restaurants, independent cafeterias, cafeterias located inside businesses, and cafeterias in supermarkets. These establishments provide local food, sandwiches, and snacks at affordable prices to working-class Dominicans.

It is estimated that about 45 percent of the total food and drink consumed in the country is imported. About 35 percent of the imported consumer-ready products are from the United States. The percentage is higher in the HRI sector, where there is a preference for imported food products, due to a perception that these are of better quality. However, it is important to note that the country's food processing industry is increasing its efficiency and competitiveness. This means that the percentage growth of finished food product imports may trail off, however, ingredient imports will probably increase.
Some of the macro-economic factors which affect the food service market are:

- **Economic Growth** -- The Dominican economy grew at over 7 percent during the last half of the 90's and a slower but respectable 2.5 percent the past two year. Tourism has been one of the most influential factors on this growth. It accounts for over 7 percent of the total GDP and it has grown at an average rate of 5.4 percent from 1998 to 2002.

- Growth in the number of women in the workforce -- Over 40 percent of women are in the labor force. This results in higher demand for food outside the home.

- The increase in per capita income in the country.

- **Vacations** -- Dominicans are taking more vacations in country. This implies an increase in food consumption in the HRI sector.

- **Menu Diversification.** - Dominicans are internationalizing their consumption habits. There is an increase in the consumption of pizzas, hamburgers and other types of fast food. In addition, most restaurants offer dishes with imported meats, fish, and other sea foods.

- **Tourism Promotion** -- The Ministry of Tourism is investing a lot of resources to promote the country overseas and all inclusive resorts are having promotional campaigns for Dominican to take vacations locally.

### Advantages and Challenges Facing U.S. Products in the Dominican Republic

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>The growth of tourism in the country, implies a greater demand for imported products, which are perceived as high-quality products.</td>
<td>The local Dominican food industry is becoming more efficient and more competitive, as it integrates new technology and machinery into its production processes.</td>
</tr>
<tr>
<td>American culture has a great influence on the Dominican Republic. This has been conveyed through the bilateral relations over several years, the large number of Dominicans living in the United States, and the influence of mass media such as cable TV.</td>
<td>Globalization and the influence of the mass media have given Dominicans access to other cultures, e.g., Europe, Asia, and South America. These different cultures influence consumption habits here and the demand for foods from those countries.</td>
</tr>
<tr>
<td>Fast food chains and other types of restaurants from the U.S. are very popular in the country.</td>
<td>The prices of products offered in fast food restaurants of U.S. origin are higher in the Dominican Republic than in the United States</td>
</tr>
<tr>
<td>U.S. suppliers can supply products with consistent and reliable quality and quantity.</td>
<td>In the Dominican Republic, there are significant tariff and non-tariff barriers for food imports.</td>
</tr>
<tr>
<td>The number of North American tourists visiting the country has been growing over the years and this trend is expected to continue as trade relations increase between both countries.</td>
<td>The Dominican Republic just signed a free trade agreement with the other Caribbean countries, which will increase trade within this area, possibly at the expense of U.S. exports.</td>
</tr>
</tbody>
</table>
II ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

The best way to enter the food service market in the Dominican Republic is through a local representative or by approaching importer/distributors directly. Fast food chains from the United States are an exception, since they usually import their own products and ingredients. Some purchasing agents for hotels and restaurants have stated that they are not interested in getting involved in the import business. They would rather buy from a reliable local supplier.

Due to the growth of tourism in the Dominican Republic, the number of businesses specialized in importing food and drinks has increased. These businesses supply most of the hotels and restaurants in the country.

The success of a new product will not only depend on the product itself, but also on the local representative's understanding of the market and his relationship with purchasing agents of different establishments. For purchasing agents, fundamental criteria for making purchases include product quality, prices and services.

B. MARKET STRUCTURE

As the tourism sector has grown, the supply system for hotels and restaurants has been changing. Previously, it was difficult for hotels and restaurants to get high-quality products. They had to either import directly or rely on local suppliers who did not guarantee the quality and quantity necessary. Even so, there are over 50 importers competing to supply products to the HRI sector. Appendix I shows a list of business hotels, all inclusive resorts, resorts, and restaurants in the Dominican Republic.

Fig. 1. Road Map for Market Entry
The major changes in food demand experienced by hotels and resorts over the last five years are:

- 80 percent of hotels in the country are resort-style, which are all-inclusive. Offering a relatively low all-inclusive price leads hotels to try to reduce the costs of the food they offer. However, some suppliers say that the insistence on high-quality products remains unchanged.

- Tour operators have put restrictions on hotels regarding the quality of the foods they offer to the point of wielding influence over the type of supplier used. Tour operators have required that firms be contracted to certify suppliers' quality control practices in order to guarantee the quality of products used in hotels.

- Local competition has increased substantially due to increases in product quality. It is estimated that 70 percent of food is produced locally.

- There is a trend towards using semi-processed products in order to reduce costs.

Local products are mostly handled through the same distribution channels as imported goods. Some local producers have approached distributors or intermediaries that are specialized in this market to try to introduce their products. However, some of the country's largest businesses prefer to sell directly to this sector, avoiding having to depend on intermediaries to introduce new products.

Usually, intermediaries who handle products for this sector are specialized by area. As a result, there are suppliers specializing in meats, fish and seafood, frozen vegetables, ice creams, fruit juices and alcoholic beverages. However, there are also some suppliers who deal with a variety of these categories. Most of these intermediaries function as wholesale importers, who handle other types of products and foods that they sell to supermarkets and to the country's traditional system of food distribution. Also, some intermediaries belong to local processing businesses that round out their product line with other imported products. Furthermore, some local processors are trying to strengthen their distribution system, including imported products.
C. SUB-SECTOR PROFILES

1. Hotels and Resorts

COMPANY PROFILES

<table>
<thead>
<tr>
<th>Name of Hotel/Resort</th>
<th>Locations</th>
<th>Number of Hotels</th>
<th>Total Rooms</th>
<th>Purchasing Agent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renaissance Jaragua</td>
<td>Santo Domingo</td>
<td>1</td>
<td>293</td>
<td>Importer / Direct</td>
</tr>
<tr>
<td>Barceló Hotels</td>
<td>Santo Domingo/ Juan Dolio/ Bávaro</td>
<td>9</td>
<td>2,963</td>
<td>Importer / Direct</td>
</tr>
<tr>
<td>RIU</td>
<td>Punta Cana/ Arena Gorda/ Puerto Plata / Bávaro</td>
<td>7</td>
<td>4,382</td>
<td>Importer / Direct</td>
</tr>
<tr>
<td>Allegro Resorts</td>
<td>Playa Dorada/ Cabeza de Toro/ Punta Cana/ Bávaro</td>
<td>4</td>
<td></td>
<td>Importer / Direct</td>
</tr>
<tr>
<td>Occidental Hotels</td>
<td>Santo Domingo/ Las Pascualas/ Sosua / Las Terrenas</td>
<td>9</td>
<td>2,833</td>
<td>Importer / Direct</td>
</tr>
<tr>
<td>Iberostar</td>
<td>Arena Gorda/ Puerto Plata</td>
<td>4</td>
<td>1,918</td>
<td>Importer / Direct</td>
</tr>
<tr>
<td>Fiesta Hotels</td>
<td>Santo Domingo / Bávaro</td>
<td>2</td>
<td>1,398</td>
<td>Importer / Direct</td>
</tr>
<tr>
<td>Meliá</td>
<td>Punta Cana/ Santo Domingo/ Bávara/ Juan Dolio</td>
<td>5</td>
<td>2,311</td>
<td>Importer / Direct</td>
</tr>
<tr>
<td>AMHSA HOTELS</td>
<td>La Romana / Barahona/ Playa Dorada/ Sosua / Cabarete</td>
<td>5</td>
<td>1,492</td>
<td>Importer / Direct</td>
</tr>
<tr>
<td>Casa Marina</td>
<td>Juan Dolio / Samaná</td>
<td>5</td>
<td>1,466</td>
<td>Importer / Direct</td>
</tr>
<tr>
<td>LTI</td>
<td>Punta Cana/ Sosúa/ Bávaro</td>
<td>3</td>
<td>1,680</td>
<td>Importer</td>
</tr>
</tbody>
</table>

The hotel sector is the largest market segment in this area, due to the fast growth of tourism. The increasing worldwide recognition the Dominican Republic gains from its sustained economic growth makes it a more attractive destination for fairs, conferences, conventions and international events. These factors contribute to increase the flow of business people to the country. The fact that the hotel sector is seeking ways to reduce costs and is receptive to using pre-cooked foods presents a great opportunity for exporters from the United States.

2. Restaurants

Although the Dominican Republic has restaurants that specialize in all types of local and international foods, there are very few chains except for fast food restaurants. Some traditional restaurants and Western-style family restaurants may expand to two locations, usually both located in Santo Domingo, the capital, and Santiago, the second largest city.

Restaurants offer good opportunities for exporters from the United States. They are very receptive to using imported foods as their menus are more oriented towards international dishes. They use many imported products including beef, fish and seafood, pasta, french fries, and hams.

Since these restaurants do not function as chains, and each restaurant's purchase is small, the best way to sell to them is through a local intermediary specialized in this type of business. The following are examples of fast food restaurants in the country. A list of upscale restaurants is shown in Appendix I.

FAST FOOD RESTAURANT PROFILES
<table>
<thead>
<tr>
<th>Name of Restaurant</th>
<th>Type</th>
<th>Locations</th>
<th>Number of Outlets</th>
<th>Purchasing Agent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burger King</td>
<td>Fast Food</td>
<td>Santo Domingo, Santiago, San Francisco</td>
<td>20</td>
<td>Direct</td>
</tr>
<tr>
<td>McDonalds</td>
<td>Fast Food</td>
<td>Santo Domingo, Santiago</td>
<td>10</td>
<td>Direct</td>
</tr>
<tr>
<td>Wendy’s</td>
<td>Fast Food</td>
<td>Santo Domingo</td>
<td>3</td>
<td>Direct</td>
</tr>
<tr>
<td>Kentucky Fried Chicken</td>
<td>Fast Food, Internet Sales</td>
<td>Santo Domingo</td>
<td>4</td>
<td>Direct</td>
</tr>
<tr>
<td>Domino’s Pizza</td>
<td>Fast Food</td>
<td>Santo Domingo, Santiago</td>
<td>6</td>
<td>Direct</td>
</tr>
<tr>
<td>Pizza Hut</td>
<td>Fast Food, Internet Sales</td>
<td>Santo Domingo, Santiago</td>
<td>6</td>
<td>Direct</td>
</tr>
<tr>
<td>Taco Bell</td>
<td>Fast Food</td>
<td>Santo Domingo</td>
<td>3</td>
<td>Direct</td>
</tr>
</tbody>
</table>

Fast food restaurants are the fastest growing part of the food service industry. In the last few years, the entry of foreign fast food chains has spurred the development of local businesses dedicated to this activity, although they tend to specialize in local popular foods. The foreign fast food chains offer good opportunities to U.S. exporters, because most of their products are imported. Many of them import their own products, primarily in the case of hamburger, meats, chickens, potatoes, sauces and ice creams. They use local ingredients for fresh vegetables and bread.

3. Institutions

In general, businesses (cafeterias and restaurants) that supply food to institutions or that manage their cafeterias are all independently run. The handling of food in prisons and public hospitals has not been privatized. Some free zones at industrial parks have begun to install cafeterias to offer food to their employees. One of the main objectives of these cafeterias is to offer inexpensive food of an acceptable quality to employees. This implies that food costs must remain as low as possible. These cafeterias are more oriented to serving traditional dishes, with over 90 percent of ingredients being produced locally. In this category there is limited opportunity for U.S. exporters, except for basic items offered at cut rate prices. Still, government-run institutions will tend to support the local agricultural sector by purchasing locally.

III. COMPETITION

The major competition for U.S. suppliers in the Dominican Republic is local producers. With an improvement in production processes nationwide, along with relatively high import tariffs, some local products have a competitive advantage. Even so, partly due to the large growth in tourism, food imports have increased in recent years in this sector.

Countries such as India, Thailand and China are the biggest competitors for fish and seafood. Argentina is the largest competitor for meats.
IV. BEST PRODUCTS PROSPECTS

The following products are the ones which have shown the highest average growth during the last five years (1997-2001) and they are ordered based on that growth.

Table 4.a.
HIGH GROWTH RATE PRODUCTS
(Calendar 1997-2001)

<table>
<thead>
<tr>
<th>PRODUCT</th>
<th>AVERAGE GROWTH % (CY 1997-2001)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Red Meats Fresh/Chilled/Frozen</td>
<td>108</td>
</tr>
<tr>
<td>2. Wine and Beer</td>
<td>55</td>
</tr>
<tr>
<td>3. Nursery Products and Cut Flowers</td>
<td>46</td>
</tr>
<tr>
<td>4. Red Meat-Prepared/Preserved</td>
<td>38</td>
</tr>
<tr>
<td>5. Pet Food</td>
<td>25</td>
</tr>
<tr>
<td>6. Fresh Fruit</td>
<td>24</td>
</tr>
<tr>
<td>7. Fruit and Vegetable Juices</td>
<td>21</td>
</tr>
<tr>
<td>8. Tree Nuts</td>
<td>16</td>
</tr>
</tbody>
</table>

Source: FAS/USDA BICO Report

Products Present in the Market Which have Good Sales Potential

Other high-value products imported from the United States which show good sale potential are dairy products (although the import permit is a constraint), breakfast cereals, and processed fruits and vegetables.

Products Not Present in Significant Quantities but Which Have Good Sales Potential

Many of the edible products in the United States have already been introduced into the Dominican market. Usually the Dominican Republic follows the same trend as the United States. Diet/healthy products, although are not present in large quantities, the demand is growing.

Products Not Present Because They Face Significant Barriers

Importers of meat and dairy products face continual problems in obtaining import permits. Although these products are not subject to quotas, the import permit process is arbitrary and unpredictable, making it difficult to bring in reliable supplies. The Dominican Government is being pressured to improve the situation. In addition, imports for seven major agricultural categories (rice, sugar, garlic, poultry meat, beans, onions and powered milk) are managed through import quotas. The country is trying to restrict imports based on discretionary import permits to protect local producers.
V. KEY CONTACTS AND FURTHER INFORMATION

If you have any questions or comments regarding this report or need assistance exporting to the Dominican Republic, please contact us at:

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Contact: Ramón Rodríguez, Executive Director
APPENDIX I

BUSINESS HOTELS, ALL INCLUSIVE RESORTS, RESORTS, AND RESTAURANTS IN THE DOMINICAN REPUBLIC

I. BUSINESS HOTELS

A. SANTO DOMINGO

MELIA SANTO DOMINGO HOTEL & CASINO
Antonio De La Calle, General Manager
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Gissel Derory, F&B Director
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INTERCONTINENTAL
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HOTEL PLAZA NACO
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**II ALL INCLUSIVE RESORTS**

**1. EASTERN REGION**

**BARCELO CAPELLA BEACH RESORT**
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Tomeu Salva, General Manager
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**OCCIDENTAL ALLEGRO RESORTS**
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Web page: http://www.cumayasa.com

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Fax: (809) 412-1818
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2. NORTHERN REGION

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Fax: (809) 571-0707
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CASA MARINA BEACH CLUB
Oscar Peña, Cooperative Director
Nieves Sobrino, Corporate Purchasing
Manager (Ext. 316)
Calle Los Pinos #7
Ensanche La Julia
Santo Domingo, DR
Tel. (809) 562-7475, Ext. 303
Fax. (809) 566-2354

PUERTO PLATA VILLAGE & SPA
Lourdes Domínguez, General Manager
Ramón Sobrino, F&B Manager
Playa Dorada,
Puerto Plata, D.R.
Tel. (809) 320-4012
Fax: (809)320-1110/5113

OCCIDENTAL FLAMENCO BEACH RESORT
Ventura Serra, Corporate Manager
(Occidental El Embajador)
Ricardo Argiles, General Manager
Pascual Ventura, F&B Manager
Playa Dorada, Puerto Plata
Tel. (809) 320-5084
Fax: (809) 320-6319
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HOTEL YAROA
Edo Dewith, General Manager
El Batey
Sosúa, D R.
Tel: (809) 571-2651
Fax: (809) 571-3814
E-mail: infoethotel@arroba.com

HOTEL GRAN BAHIA
Mario Paredes, General Manager
Samaná, D.R.
Tel. (809) 538-3111/20
Fax: (809) 538-2764
III. RESTAURANTS

A. SANTO DOMINGO

LA BRICIOLA
Sabrina Colombo, General Manager
Franco Riccobono, Owner
Calle Arzobispo Meriño #152
Zona Colonial
Santo Domingo, D.R.
Tel: (809) 688-5055
Fax: (809) 688-6038
E-mail: labriciola.com.do@codetel.net.do

REINA DE ESPAÑA
Catalina Henríquez, Owner/Manger
Calle Cervantes #103, Gazcue
Santo Domingo, D.R.
Tel: (809) 685-2588/687-5029
Fax: (809) 689-8461

RESTAURANT VESUVIO
Vincenzo (Enzo) Bonarelli, Owner
Avenida George Washington # 521
Santo Domingo, D.R.
Tel: (809) 221-1954
Fax: (809) 221-3300
E-mail: vesuvio@restaurantvesuvio.com

RESTAURANT VESUVIO II
Gaetano Bonarelli, Owner
Giancarlo Bonarelli, General Manager
Avenida Tiradente #17, Ensanche Naco
Santo Domingo, D.R.
Tel: (809) 562-6060
Fax: (809) 541-1104

RESTAURANT JUAN CARLOS
María Lidía Hurtado Gil, Owner/Manager
Avenida Gustavo Mejía Ricart #7
Santo Domingo, D.R.
Tel: (809) 562-6444
Fax: (809) 562-6444

RESTAURANT DON PEPE
José María Díaz, Owner
Avenida Pasteur #41,
Esquina Calle Santiago
Gazcue
Santo Domingo, D.R.
Tel: (809) 686-8481/689-7612
Fax: (809) 685-7984

RESTAURANT PALACIO DE JADE
Johnson Ng, Owner
Leonida Montilla, Manager
Calle José María Heredia #6
Gazcue
Santo Domingo, D.R.
Tel: (809) 686-3226
Fax. (809) 699-9562

STEAKHOUSE CAFÉ
Eduardo Alvarez, General Manager
Avenida Gustavo Mejía Ricart #52
Ensanche Naco
Santo Domingo, D.R.
Tel: (809) 565-1039/7137
Fax: (809) 476-0226
E-mail: steakh@tricom.net,
e_alvarezf@hotmail.com

FELLINI RISTORANTE & BAR
Lucas Piraccini, Owner
Calle Roberto Pastoriza #504
Santo Domingo, D.R.
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Fax: (809) 541-4924
E-mail: fellini@codetel.net.do

SCHEREZADE RESTAURANT
Juan Scheker, Rafael Scheker and
Elizabeth Scheker, Owners
Avenida Roberto Pastoriza # 226,
Ensanche Naco
Santo Domingo, D.R.
Tel: (809) 227-2323
Fax: (809) 540-3030
TABOO BAMBU
Avenida Roberto Pastoriza #313
Enrique Peinado, Owner/Manager
Tel: (809)227-2727/3443
Fax: (809) 227-3555

EL MESON DE LA CAVA
Otto Ricart, Owner
Laura Ricart, General Manager
Avenida Mirador del Sur #1
Santo Domingo, D.R.
Tel: (809) 533-2818/532-2615
Fax: (809) 533-8150

RESTAURANT DAVID CROCKET
Aníbal Fernández, Owner
Avenida Gustavo Mejía Ricart #34
Ensanche Naco
Santo Domingo, D.R.
Tel: (809) 547-2999/227-2899
Fax: (809) 566-7743

TOSCANNA
Alfredo Alonso, Owner
Calle Erick Leonard Ekman #34
Arroyo Hondo
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NEPTUNO’S (BOCA CHICA)
Claus Reprich, Owner
Autopista Duarte #20, Boca Chica
Tel: (809) 523-4703/6534/4279
Fax: (809) 523-4251
E-mail: neptunos@codetel.net.do

RESTAURANT SPAGHETTISSIMO
Frederick Gollon, Owner
Paseo de los Locutores #13
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Fax: (809) 549-6443

RESTAURANT LA ATARAZANA
Ramon Santiago, President
Calle La Atarazana # 5, Zona Colonial
Santo Domingo, DR
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RESTAURANT EL BUCANERO
Marino Díaz, President
Avenida España, Puerto Sans Souci
Santo Domingo, DR
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Fax.(809)592-2305

SEASON'S RESTAURANT
Roberto Sanson, Owner
Angela Bertha Medina, General Manager
Avenida Roberto Pastoriza No. 14, Ensanche Naco
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Tel: (809) 412-2655/565-2616
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RANCHO STEAK HOUSE
Nadua Hazim, General Manager
Julio Hazim, Owner
Plaza Lope de Vega, Local B13, 2do. Nivel
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RESTAURANT SULLY
Carlos Fermin, President
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RESTAURANT EL PAPARAZZO
Heriberto Hernández, Owner
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B. SANTIAGO

RESTAURANT MAROMA
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RESTAURANT MESALUNA
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RESTAURANT EL PEZ DORADO
Jorge Ho, General Manager
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RESTAURANT EL PAPARAZZO
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