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Dominican Republic

Retail Food Sector

Annual

2004

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Report Highlights:
The overall means for exporting products to this country so that it may reach the end consumer would be through the importer/distributor and the large supermarket chains. These are importing products directly from overseas. Supermarkets are establishing exclusivity rights also for certain brand name. They cover the main cities in the country and are also suppliers for the foodservice sector. Although around 75% of local food products are sold through mom and pop's stores (colmados), which are scattered all over the country, supermarkets are growing in size and numbers and they are the best means for imported products to reach the end consumer.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Santo Domingo [DR1]
[DR]

RETAIL FOOD SECTOR REPORT

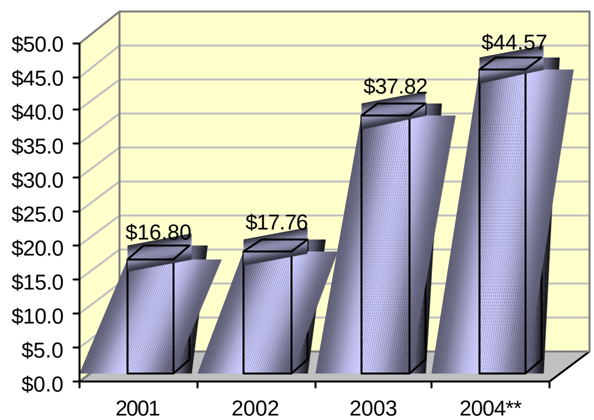
I. MARKET OVERVIEW

I.a) The Economic Situation

Although, the Dominican Republic was seen as a success story for economic growth in the late 1990's, with an averaging growth of 7.6 percent from 1998 to 2002, the economy all but collapsed in 2003, due to building economic problems exacerbated by a spectacular bank collapse and default, with allegations of massive corruption. Economic growth fell from 4.7 to –1.3 percent, inflation that had been single digit soared to 42.6 percent in 2003, and the Dominican peso lost over half its value, plummeting from an average of 17.76 per U.S. dollar in 2002 to 37.82 in 2003.

In 2004, the economy has weathered a very difficult period but has moved back from the brink, with forecasts for economic growth of -1 percent and inflation of 54 percent. The peso has recovered considerable strength recently and stabilized, trading at around 32 pesos per U.S. dollar during September and October 2004. Prospects for 2005 are for continued, slow improvement in the economy, which should help refuel demand for imported consumer-oriented products. Independent forecasts for 2005 are for economic growth of around 4.5 percent and inflation of 10.6 percent. Favorable macroeconomic statistics should help to maintain the value of the peso, especially against the weakening U.S. dollar.

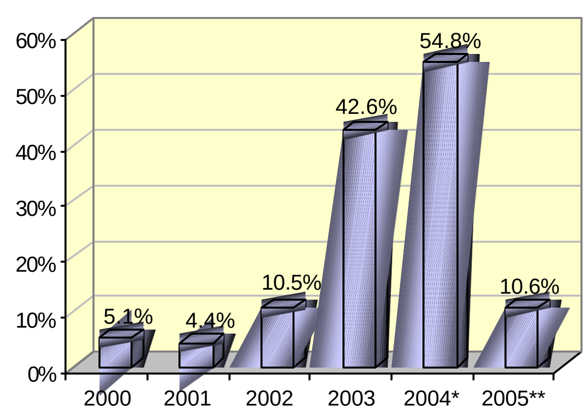
EXCHANGE RATE (Average)



**Until August 2004.
Source: Central Bank of the Dominican Republic.

As expected, the economic contraction and loss in currency value has sharply reduced the purchasing power of Dominican consumers, leading to a similar sharp drop in demand for imported food products, as reflected in U.S. export statistics. Total agricultural imports from the United States dropped only modestly from 567,336 million in 2002, to 487,136 million in 2003, due to high values for many agricultural commodities.

INFLATION

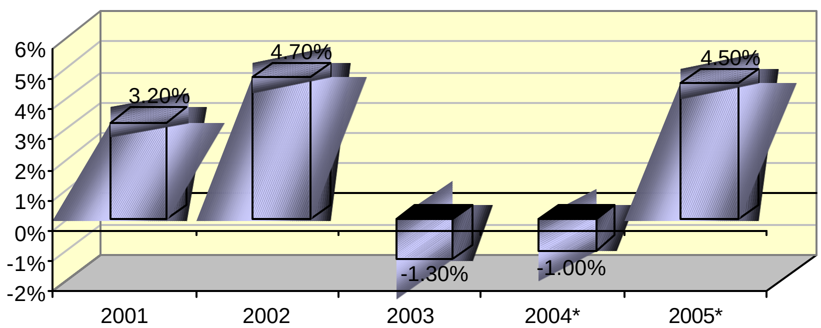


*Until August 2004.
**Estimated value.
Source: Central Bank of the Dominican Republic.

However, imports of consumer-oriented products plummeted from 102,464 million in 2002 to 74,028 million in 2003. Through August 2004, imports of U.S. consumer-oriented products are off by another 14 percent. However, the 28.2 percent appreciation of the peso against the U.S. dollar, beginning in August, if it continues, will do much to stimulate demand imported food and beverage products.

Despite the negative prospects for the short term, the Dominican market for imported food and beverage products still remains large and diversified and will regain its vigor, as the country works its way through the current economic problems.

GDP ANNUAL PERCENT CHANGE



*Estimated values.
Source: Central Bank of the Dominican Republic.

I.b) The Dominican Food and Beverage Market

The Dominican Republic is the fourth largest market for U.S. agricultural products in the Western Hemisphere, behind Mexico, Canada, and Colombia, with calendar 2003 imports of $488 million. About 46.6 percent of agricultural imports from the United States are bulk commodities, such as feed grains and soybean meal, which are in high demand by the Dominican poultry, dairy and pork sectors. This domestic agricultural sector supplies much of the fresh produce, non-deciduous fruit, and other basic foodstuffs, such as beans and rice, to the retail and food service sectors. However, the retail food market is highly dependent on imported products to meet demand for processed food products, fruit, and non-alcoholic and alcoholic beverages.

According to statistics provided by the Central Bank, the total demand for food and beverages was estimated at US$2 billion, with an average growth rate of six percent per year. It is estimated that about 40 percent of the all food and beverages consumed in the country are imported. About 60 to 65 percent of these imported products come from the United States. Approximately 75 percent of retail food products are sold through the traditional system of mom n' pop stores called *Colmados*, and about five percent is sold directly by wholesalers. Only the remaining 20 percent is sold through modern supermarkets. However, this is the market segment through which imported products reach the middle and upper classes (3.8 million consumers), the target market of most U.S. exporters.

In the Dominican Republic, the general trend in distribution channels has been to reduce the role of intermediaries. Many importers and local producers are distributing their products directly to retailers. The importation and distribution of processed food and beverage products is carried out by both independent importers/distributors, who are the main players for this sector, and through direct importation by supermarkets. The large supermarket chains are importing directly a basic line of food products, which they handle exclusively. For example, Supermercados Nacional carries the Best Yet line of products and Supermercados Bravo imports a basic line of products from IGA. These product lines are used in much the same way as store brands to provide a price competitive line of basic products to customers.

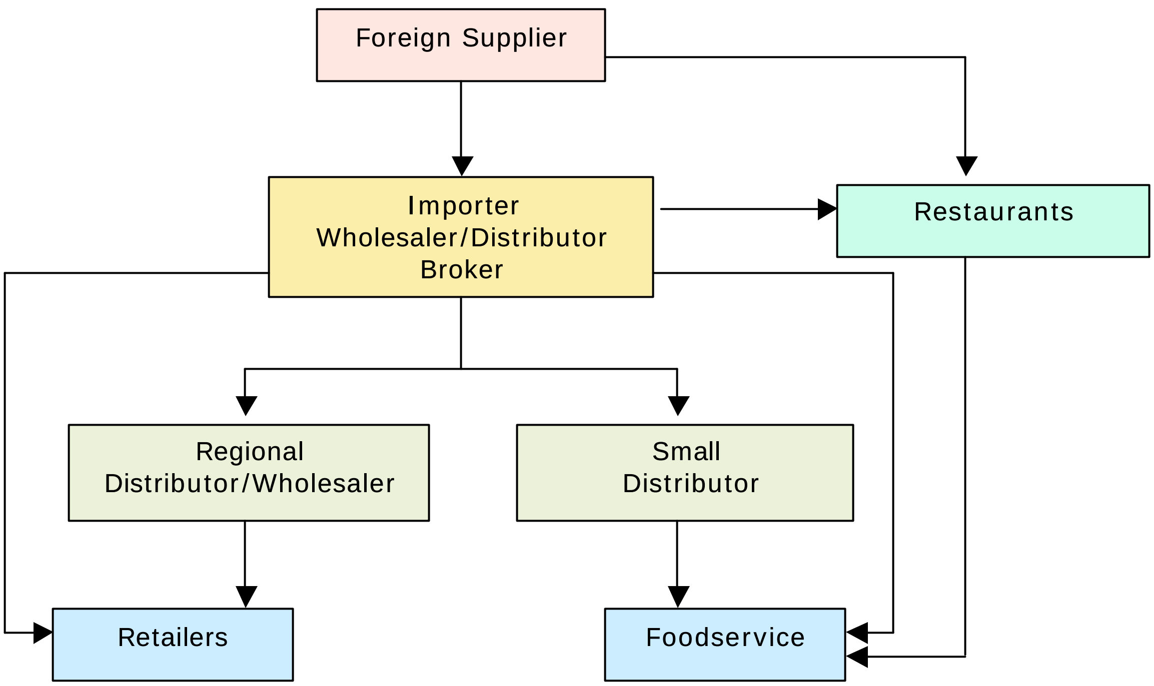
Gas marts began to appear in this country in 1995 and expanded during the 1990s; but growth in the number of outlets has now largely stopped, because of the current economic situation. In 2003, there were 70 gas marts in the country.

Although the Dominican Republic is generally trying to comply with WTO regulations, obtaining import permits for meat and dairy products is still one of the main constraints facing importers of these products. Due to the uncertainties in the process for granting import permits, it is too risky to ship products before having received a permit. This presents problems for exporters (and importers) of perishable products with a short shelf live, such as yogurt.

Some of the advantages and challenges facing U.S. exporters in the Dominican market are the following:

Advantages	Challenges
1. The supermarket sector is well developed and the number of supermarkets has grown nationwide, providing greater market penetration for most imported food products. 2. Dominicans are greatly influenced by American culture and have a positive perception of U.S. products. 3. The Dominican Custom Service uses the WTO-approved method of customs valuation, which requires that duties be applied to actual invoice prices of imported goods, rather than average or calculated price for imported goods.	1. The current economic crisis is reducing demand for imported food products and limiting the interest supermarkets have in introducing new products. 2. Local producers and processors are becoming more competitive in quality and price. 3. Globalization has allowed other regions, such as Europe, South American and Asia, to expand sales into what has traditionally been a U.S.-dominated market. 4. Imports of some products, including milk, beans, rice, and poultry, are restricted by tariff rate quotas to protect local producers.

MAIN DISTRIBUTION STRUCTURE



II. ROAD MAP FOR MARKET ENTRY

A. SUPERMARKETS

Entry Strategy

The best way to enter the Dominican market is through a local importer/distributor. These importers/distributors are familiar with the market, business practices, and related laws and should be able to establish direct sales contacts.

The large supermarket chains have formed companies in order to import food products and beverages. As wholesalers, these companies resell the imported products to regional/small wholesalers/distributors, restaurants, retailers and food service institutions. As retailers they use their own supermarkets to reach the consumers.

Supermarkets have a buying structure that depends on their size, which varies from 3,000 to 60,000 square feet. The largest supermarkets chains have purchasing departments with several buyers, specialized by product line. Normally, supermarkets have no more than 3 to 5 brands of one type of product, and the selection of these brands is based on competitive advantage criteria for the business and for customers. Usually quality and price are the two most important variables that affect this decision.

Market Structure

- Normally, products are imported through an importer or agent, who may also be a wholesaler and/or distributor.
- In the case of large supermarkets, most have a separate company, in a holding group, which assumes the function of importer/distributor.
- Logically, supermarkets will prefer products that are imported by their own companies, but they do purchase products from other importer/distributors.
- While small supermarkets are closing, the big supermarket chains have opened new locations this year in Santo Domingo and other cities.
- According to national laws, any business may import goods directly.
- Purchasing managers of some supermarkets chains estimate that the sales of imported products in their establishments are between 40 and 45 percent of total sales, of which about 50 percent of these are U.S. products.
- Floor space of the largest supermarkets (Nacional, Pola, Bravo, La Cadena, Plaza Lama, Carrefour, Hiper Ole, and PriceSmart) ranges from 10,000 to 35,000 square feet and they have 8 to 15 cash registers per establishment.

Table 1.a. PROFILE OF THE MAJOR SUPERMARKETS

Name of Retailer	Ownership	Outlets	Location	Purchasing Agent
Supermercados Nacional	Dominican/Spain	18	Santo Domingo Santiago La Romana	Direct importers Wholesalers/Distributors
Supermercados Pola	Dominican/Spain	8	Santo Domingo Santiago	Direct importers Wholesalers/Distributors
Supermercados La Cadena	Dominican/Spain	6	Santo Domingo	Direct importers and distributors
Supermercados Plaza Lama	Dominican/Spain	3	Santo Domingo	Direct importers and distributors
Supermercados Bravo	Dominican/Spain	3	Santo Domingo	Direct importers and distributors
Price Smart Warehouse	US	2	Santo Domingo Santiago	Direct importers and distributors
Carrefour	French	1	Santo Domingo	Direct importers and distributors
Hipermercados Ole	Dominican/Spain	5	Santo Domingo San Cristobal	Direct importers and distributors

Company Profiles:

Supermercados Nacional

Supermercados Nacional is the largest supermarket chain in the Dominican Republic. It has ten stores located in the cities of Santo Domingo, Santiago and La Romana. This chain is the pioneer of the Dominican supermarket business. The stores are manage by Centro Cuesta Nacional, which has its own procurement and distribution center to source products and supply stores.

Centro Cuesta Nacional also established a new store concept called La Despensa to target the lower-income population and to compete with the Central American Chain Pali when it entered the Dominican market in 2000. This effort was successful, and Pali had to close its operations in the DR and most of their stores where purchased by Centro Cuesta Nacional. The La Despensa concept was expanded, becoming the leader in this market segment. Currently, La Despensa has six outlets.

Another concept established by Centro Cuesta Nacional is the Jumbo hypermarket. So far, it has opened two stores, one in the eastern part of Santo Domingo and the other one in la Romana.

The Supermercados Nacional stores are modern and spacious. The outlet in La Romana is located inside Casa de Campo, one of the most exclusive resorts in the country. Because of the nature of this outlet's location, it carries a lot of gourmet products that are not usually found in the other outlets. This company also has the private label Best Yet for U. S. products.

Supermercados Pola

This is the second largest supermarket chain in the country. The chain is owned by the Grupo Ramos business group. Supermercados Pola has eight outlets located in Santo Domingo and Santiago. Importadora Oceanica is the company within Grupo Ramos that handles imports and distribution of food and beverage products. This company works almost the same way as Centro Cuesta Nacional and also has exclusive representation of different brands. It sells its products through Supermercados Pola and supplies other retailers, as well.

Supermercados La Cadena

This is a relatively new supermarket chain, which was established in 1999 after some of the members of the Ramos family, owners of Supermercados Pola, decided to start their own supermarket chain. The supermarket started with only one store and it currently has six outlets in Santo Domingo. The supermarkets are owned and managed by Mercatodo, S.A., which is a supermarket chain that has been around for just a couple of years.

Supermercados Bravo

The owner of Supermercados Bravo, Rafael Monestina, was one of the founders and owners of Supermercados Pola. The owner left Supermercados Pola to start his own import business, BEMOSA. Later, in the 1997, Mr. Monestina, decided to go back to the supermarket business and started the project to established Supermercados Bravo. The first store was inaugurated in 1998. Currently, Supermercados Bravo has three stores in Santo Domingo and plans to open another store in the near future.

Supermercados Plaza Lama

The original focus of the Plaza Lama store was as a retailer of appliances, shoes, and cloths. In 1991, they added dry food products to provide additional services to the customers. The first real supermarket with full lines of grocery and frozen products was established in 1995. Another supermarket and a mini market were opened in 1999.

In 2001, Plaza Lama opened a centerpiece-shopping complex in one of the main commercial areas of Santo Domingo. The plaza included the largest supermarket of the Plaza Lama's chain and it includes a deli and a gourmet product section. Currently, the chain has three supermarkets and a mini market all located in Santo Domingo. The supermarket portion of the Plaza Lama business is currently the second largest department following appliances. It seems likely that supermarkets will evolve into the main business in the near future.

B. CONVENIENCE STORES and GAS MARTS

In addition to the ubiquitous mom-and-pop-type corner store (*colmados*), there are a growing number of gas marts in the Dominican Republic. These locations are not identical in format to those in the United States in that they are smaller and serve little hot food, focusing on snack foods and beverages. As a business model, they have one important drawback--attendants who pump gas and collect money, so customers do not have to enter the store to pay for gas serve the gasoline station. This means that a majority of gas customers never enter the store, reducing the sale of impulse items on which these stores usually thrive. That means that gas is the primary business and food and beverage sales are a sideline. But, the stores are successful and their numbers are increasing, making them an attractive target for exporters of snack food and beverage products.

Market Entry

As indicated above, there are a limited number of products that can be introduced in these stores. If you are a snack food or beverage company or willing to do the pioneering work to get these stores to carry your hot food products, these could be a good point of sale for your products. These stores prefer to buy directly from importer/distributors that have direct distribution systems. Our recommendation is to make contact with the companies themselves and the importer/distributors that already supply them to do the initial work necessary to expose them to your products.

Market Structure

Most of the convenience stores located in gas marts are managed according to norms established by the gasoline company. These stores are relatively new, having appeared only within the past 8-9 years. Texaco has 26 Food Marts and is now establishing a new franchise called Star Mart, which has 6 stores. Shell has 11 Select stores. Esso has On the Run, Tiger Market (26), and 2 Mini Markets, which they are leasing out. Some have indicated that they have no immediate plans for expansion, because of the current economic situation in the country, but others have opened new stores.

Table 1.b. PROFILE OF THE MAJOR CONVENIENCE STORES

Name of Retailer	Ownership (Local/ Foreign)	Number of Outlets 2003	Location	Purchasing Agent
On the Run & Tiger Market	Dominican	26	Nationwide	Distributor
Food Mart	Dominican	26	Nationwide	Distributor
Star Mart	Franchise/ Dominican	6	Nationwide	Distributor
Select	Dominican	11	Santo Domingo	Distributor
Mini Mart	Dominican	2	Santo Domingo	Distributor

Source: Ag Office Internal Research

C. TRADITIONAL MARKETS - "MOM-AND-POP" CORNER STORES

Market Structure

There are approximately 52,000 small mom n' pop stores in the country, referred to locally as *Colmados*. These are supplied by the over 1,600 food wholesalers nationwide, most of which are located in the Santo Domingo and Santiago areas. The *Colmados* have refrigeration systems for drinks (beers, juices and soft drinks), but only very few have storage for fruits and vegetable. Because the electrical supply in the country is very unstable, they do not handle perishable foods. In middle and upper-class areas, the stores thrive on home deliveries of items, such as beverages and other individual items for which the customer is willing to pay a higher price to avoid a trip to the supermarket.

Colmados account for a large portion of national sales, but sell a very limited line of products, which include a large percentage of domestically produced products (around 80 percent). They also tend to sell in very small quantities and at prices 5 to 15 percent higher than the supermarkets. Middle and upper class consumers generally make large weekly shopping trips to supermarkets, where there is a better selection of products and lower prices, then supplement this with small purchases at the nearest *colmado.*

III. COMPETITION

Although reliable statistics are not available, the percentage of Dominican imports of food products coming from the United States is estimated at 55-60 percent. According to local importers, the other 40-45 percent comes from Europe (Italy, Spain, the Netherlands, Norway, Belgium, and Portugal), Central America (Costa Rica, Ecuador), South America (Chile, Argentina, Venezuela, and Brazil) and the Caribbean (Trinidad and Tobago).

Two free trade agreements with Central America and Caribbean are being implemented, which have helped increased imports from South America, Central America and the Caribbean. Another free trade agreement is being negotiated with the United States. Though the agreement has not been ratified yet, it will make U.S. products more accessible to the Dominican market, significantly increasing imports of food and beverages.

IV. BEST PRODUCTS PROSPECTS

Dominican importers and consumers have shown high interests in the following products:

U.S. Exports to the Dominican Republic
(Thousand of Dollars)

PRODUCT	2003
1. Wine and Beer	11,053
2. Red Meats, Fresh/Chilled/Frozen	5,566
3. Red Meats, Prepared/ Preserved	2,109
4. Pet Food (Dog and Cat Food)	2,440
5. Low Carb and Light Foods	N/A
6. Breakfast Cereals	2,765
7. Snack Foods	8,104
8. Fruit and Vegetables	5,110
9. Dairy Products	9,168

Source: U.S. Census

Products Present in the Market, Which have Good Sales Potential

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

Products Not Present in Significant Quantities but with Good Sales Potential

There are few products from the United States, which have not been already introduced into the Dominican market. The Dominican Republic usually follows the same trend as the United States. Dietary and healthy products, although not present in large quantities, do have a small but growing niche in the Dominican supermarket sector. There are also health food mini-stores, which are also being opened in response to public demand. As the economy recovers, demand for low-carb and healthy products will likely grow.

Products Not Present Because They Face Significant Barriers

There are tariff rate quotas for eight basic commodity groups (chicken, onions, garlic, dried beans, corn, rice, sugar, and milk powder), which limit imports. The main import barrier faced in the market is the difficulty and arbitrariness in obtaining import permits for meat and dairy products.

V. POST CONTACT AND FURTHER INFORMATION

FOREIGN AGRICULTURAL SERVICE
Avenida Pedro H. Ureña #133, La Esperilla
Santo Domingo, Dominican Republic
Phone: (809) 227-0112
Fax: (809) 732-9454
E-mail: AgSantoDomingo@usda.gov
Home page: http://www.usemb.gov.do/fas.htm

The Foreign Agricultural Service home page at http://www.fas.usda.gov has useful information on how to export to the Dominican Republic, including a report titled "Exporter Guide to the Consumer Food Market".

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ASOCIACIÓN DE MAYORISTAS DE PROVISIONES DE SANTO DOMINGO, INC. (WHOLESALERS ASSOCIATION)
Mr. Mario Antonio Uceta, President
Avenida 27 de Febrero #375
Santo Domingo, Dominican Republic
Tel: (809) 565-6519 and 567-7995
Fax: (809) 472-3048

FEDERACIÓN DE COMERCIANTES DETALLISTAS DE LA REPUBLICA DOMINICANA, INC. (NATIONAL COLMADO ASSOCIATION)
Mr. Gilberto Luna, President
Calle Juan Erazo #61
Santo Domingo, Dominican Republic
Tel. (809) 221-9035
Fax. (809) 682-8122

MAJOR FOOD IMPORTERS/DISTRIBUTORS (SUPERMARKETS)

SUPERMERCADO NACIONAL, C x A.
José Miguel González C., Executive President
Antonio Fernández, Vice-President of Supermarkets
Avenida Abraham Lincoln, esquina Avenida 27 de Febrero
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Santo Domingo, Dominican Republic
Tel: (809) 565-5541/537-5017/566-2160
Fax: (809) 537-2719/473-8606
Website: www.centrocuestanacional.com

SUPERMERCADO POLA, S.A.
Román Ramos, President
Miguel Parada, Import Manager
Avenida Winston Churchill, esquina Angel Severino Cabral
Santo Domingo, Dominican Republic
Tel: (809) 472-4444/532-9575(Sarasota)
Fax: (809) 683-1373
E-mail: m.paradas@importadoraoceanica.com

HIPER MERCADOS OLE S.A.
José Manuel Rodríguez, President
Avenida Duarte # 194
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Tel: (809) 372-0909
Fax: (809) 536-6411

SUPERMERCADO LA CADENA (Mercatodo)
Juan E. Ramos Vicente, President
Nicolas Ramos, Vice-President of Operations
Avenida Abraham Lincoln #751
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Tel: (809) 565-0000
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PRICE SMART
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SUPERMERCADO PLAZA CD
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Email: casadiomedes@hotmail.com

SUPERMERCADO BRAVO (BEMOSA)
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SUPERMERCADO PLAZA LAMA
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FRUIT IMPORTERS (APPLES, PEARS & GRAPES)

R. H. MEJIA & COMPANY, C. x A.
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GENESA, S.A.
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ALPA IMPORT, S.A.
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GROCERY DISTRIBUTORS/IMPORTERS (EXCLUDING SUPERMARKETS)

ALMACENES LEON, C. X A.
Juán León, President
Luciano León, Purchasing Manager
Carreterra Duarte Vieja, Esquina Autopista Duarte Km. 10½
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