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Dominican Republic

Retail Food Sector

Report

2002

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Report Highlights:
The latest changes in the retail sector structure in the Dominican Republic benefit the distribution and consumption of imported products. Although around 75% of food products are sold through mom and pop's stores (colmados), which are scattered all over the country, supermarkets are growing in size and number 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

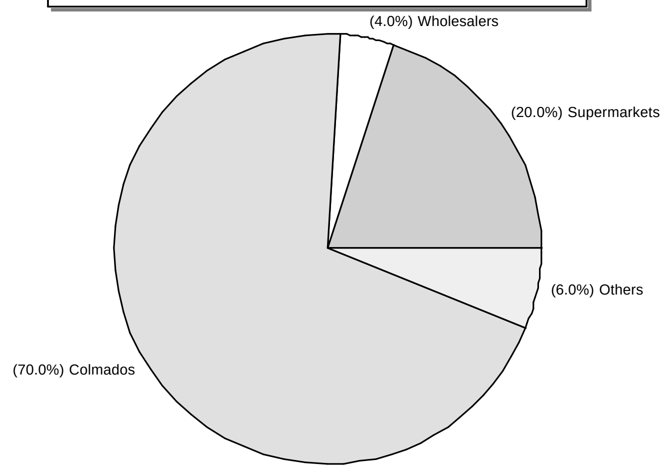
I. MARKET OVERVIEW

The retail food sector plays a key role in distributing US consumer-ready products in the Dominican Republic. This sector is comprised of three major sub-sectors: wet markets, supermarkets and mom and pop's stores (colmados). The latest changes in the retail sector structure benefit the distribution and consumption of imported products.

Supermarkets have benefitted the most from recent changes. The wet market has been the most negatively affected one. Although mom and pop's stores have the highest market share nationwide, supermarkets are growing in number and size, and are the best channel for imported products. Gas Marts have also gown in the last few years. In 1999, there were only 40 food marts and now there are 57 seven located in the major cities.

According to the latest National Survey on Income and Expenses carried out by the Dominican Central Bank, in 1998, the total demand for food and drinks was estimated at US$3.1 billion. Due to the average economic growth of 6 % per year, it is estimated that this figures reached US$3.7 in year 2001. It is estimated that about 80 % is distributed through the traditional system: "Colmados" (75%), Wholesalers(4 %), and others(1%). Only about 20 % is distributed through supermarkets. However, this is the market segment through which imported products reach the middle and upper classes, the target market of most U.S. exporters

Figure 1. Market Share by Retail Outlet



It is estimated that about 45% of the total food and drink consumed in the country is imported. About 53% of the imported products are from the United States. This ratio is expected to continue both in terms of food imports and in U.S. participation.

The general trend in distribution channels is to reduce the role of intermediaries. Many importers and local producers are distributing their products directly to retailers. Large supermarket chains are importing directly their products through their own importing company and at the same time are representing some product lines in the country.

In 2001 there were some 636 supermarkets and mini markets nationwide. About 50% of them were located in Santo Domingo, the capital city and the largest one with a population of about two million people, and 20% in Santiago, the second largest city with a population of about one million people. More than 30% of these supermarkets have been opened in the past three years.

There are approximately 1,600 wholesalers, 52,000 colmados and 57 food marts at gas stations. Most wholesalers also are retailers. Many of these have been transforming their businesses, adding a self-service area, which functions as a supermarket.

There are various services provided by retailers to their customers. Almost all large and medium sized supermarkets have a cafeteria or fast food restaurant that is mainly used by people working in nearby businesses. Some supermarkets have photo developing services and commercial bank offices.

Small convenience stores are also improving customer services. Besides providing credit to some customers, they are implementing home delivery mainly at residential areas.

Some of the advantages and challenges facing US exporters in the Dominican market are the following:

Advantages	Challenges
1. The number of supermarkets has grown nationwide, and this is the main means to distribute most imported food products.	1. More than 75% of food products are still distributed through traditional means, small grocery stores ("colmados").
2. The economic growth of the country (nearly 6% annually over the last 5 years), supported by an increase in tourism, increases the demand for high quality food products.	2. Local producers and processors are becoming more competitive in quality and price.
3. American culture has a great influence the consumption patterns of Dominicans.	3. Globalization has allowed other cultures, such as European, South American and Asian, to influence the consumption pattern of Dominican.
4. The Dominican Custom Service is currently using GATT valuation system, which states that invoice prices should be used instead of a set arbitrary price for imported goods.	4. Import of some products (milk, beans, rice, and poultry) is restricted by a WTO-approved safeguard to protect local production.

II. ROAD MAP FOR MARKET ENTRY

A. SUPERMARKETS

Entry Strategy

The best way to enter the Dominican market is through a local representative. This representative should know the market, business practices, related laws and should be able to establish direct sales contacts with supermarkets. Depending on the type of product to be introduced, an analysis of the representative's sales organization and the product lines is suggested. It is also advisable to seek legal advice on this matter. The Exporter Guide (Report #DR2028) provides more specific information on this issue.

Although the Dominican Republic is generally trying to comply with WTO regulations, import permits are still one of the main constraints importers are facing to introduce meat and dairy products to the Dominican market. 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 yoghurt.

Supermarkets have a buying structure that depends on their size. The largest supermarkets have a purchasing department 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. The purchasing committee decides on the introduction of new products.

Market Structure

- Normally, products are imported through an Importer or Agent who may be a wholesaler and/or distributor.
- In the case of large supermarkets, most of them have a separate company, in a Holding Group, which assumes the function of importer/distributor.
- Supermarkets prefer products which are represented by a known agent.
- Most chain supermarkets have plans to open new locations this year in Santo Domingo and in other cities nationally.
- According to national laws, any business may import goods directly.
- According to some supermarket purchasing managers, the sales of imported products in their establishments is between 40 and 45% of total sales, of which about 50% of these are products from the United States.
- The floor space of the largest supermarkets (Pola, Nacional, Bravo) ranges from 15,000 to 55,000 square feet and they have between 8 to 50 cash registers per establishment.

Figure 2a.

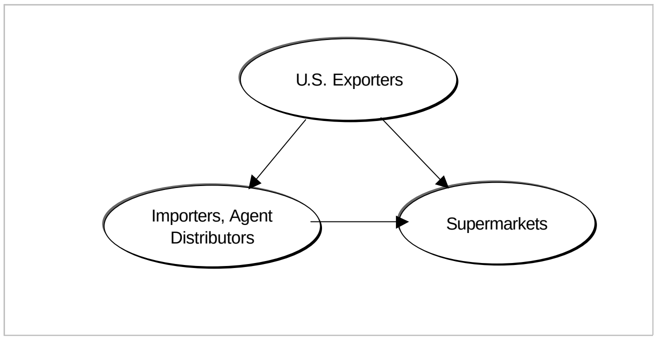


Table 2.a. PROFILE OF THE MAJOR SUPERMARKETS

Name of Retailer	Ownership (local/foreign)	Number of Outlets	Location	Purchasing Agent
Supermercados Nacional	Dominican/Spain	10	Santo Domingo and Santiago	Direct importers and distributors
La Despensa	Dominican/Spain	6	Santo Domingo	It belongs to Supermercados Nacional
JUMBO	Dominican Spain	1	La Romana	Another Name/Concept for Supermercados Nacional
Supermercados Pola	Dominican/Spain	8	Santo Domingo and Santiago	Direct, importers and 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
PriceSmart Warehouse	US	3	Santo Domingo and Santiago	Direct importers and distributors
Carrefour	French	1	Santo Domingo	Direct importers and distributors
Hipermercados Ole	Dominican / Spain	6	Santo Domingo and San Cristobal	Direct importers and distributors

B. CONVENIENCE STORES, GAS MARTS, KIOSKS

The only type of modern convenience stores that exists in the Dominican Republic is the one located at the gasoline stations.

Market Entry

As in the case of supermarkets, the best way to introduce products into this type of business is with a good representative. In this case, one must rely on a direct and efficient distribution system that can make frequent visits to the establishments.

Market Structure

Convenience stores located in gasoline stations are designed according to norms established by the gasoline company.

The main objective of gasoline companies is to increase fuel sales through the service provided by the convenience stores. The impact of these convenience stores in the Dominican Republic has not been the same as in the United States, due to the fact that customers do not need to leave their cars to buy gas.

The number of these stores has increased during the last year. Some of them have closed their operations due to a lack of profit. Each separate store purchase the specific products it wants to sell.

These stores carry a limited number of products. These are consumer ready products, such as soft drink, juice, beer, snacks, sandwiches, chocolate, and ice cream. Most of the juices, snacks and ice creams are imported.

It is a relatively new business, in which most of the stores have been established within the last three or four years.

These stores prefer to buy directly from distributors through direct distribution systems.

Figure 2b

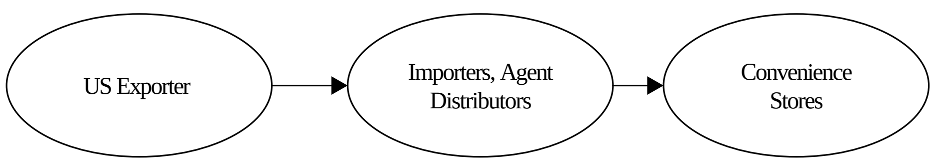


Table 2.b. PROFILE OF THE MAJOR CONVENIENCE STORES

Name of Retailer	Ownership (Local/ Foreign)	Number of Outlets 2002	Location	Purchasing Agent
On the Run	Dominican	4	Santo Domingo	Distributor
Tiger Market	Dominican	20	Nationwide	Distributor
Star Smart	Dominican	26	Nationwide	Distributor
Select	Dominican	7	Santo Domingo	Distributor

Source: Developed by the Authors

C. TRADITIONAL MARKETS - "MOM AND POP" SMALL INDEPENDENT GROCERY STORES AND WET MARKETS

Entry Strategy

To introduce products into this sub-sector, exporters should be cautious in choosing a local representative who has a good knowledge of the market, preferably with an efficient system of direct distribution. The local representative could be a wholesaler, importer, or local processor who manufacture products that are distributed through the same channels.

It is advisable to use a representative who has or can establish a direct distribution system which sells directly to these small stores or "colmados".

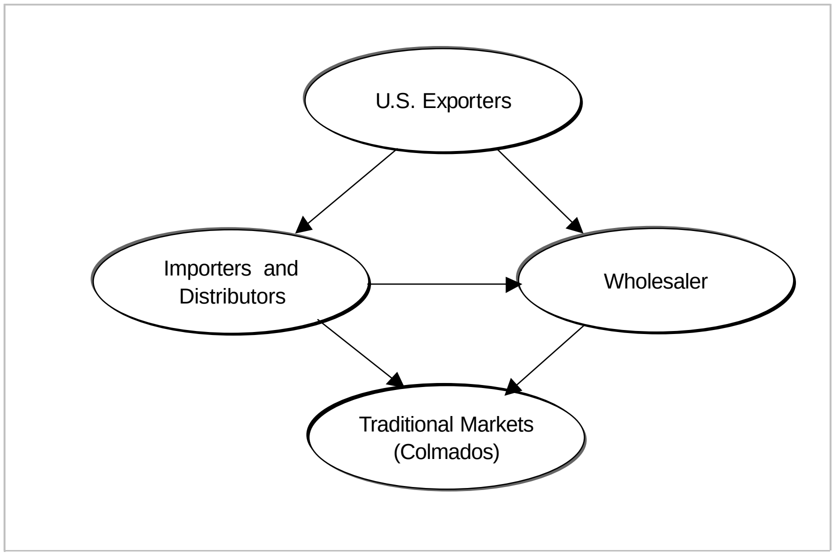
Market Structure

There are some 1,600 food wholesalers nationwide. Most of them are located in the Santo Domingo and Santiago areas.

It is estimated that in 2001 there were 52,000 colmados and 41,000 "pulperías and ventorrillos". "Pulperías" and "ventorrillos" are very small grocery vendors, with less space and fewer products than a "colmado" and they are visited not as frequently as the "colmado" by direct suppliers.

"Colmados" have refrigeration systems for drinks (beers, juices and soft drinks), but only rarely for fruit and vegetable storage. The supply of electricity in the country is not stable. This greatly affects the handling of perishable products at the colmados.

Figure 2c



The "colmados" are easily reached by suppliers (distributors, producers and wholesalers) due to the relatively good communication systems in the country (telephones, highways). Retailers usually go to public markets only to buy fruits and vegetables.

About 75% of food items are distributed by colmados. The location (distance), along with the small quantity of some products needed, play an important role in the customer's decision to buy at the "colmado" or at the supermarket.

The increase of the supermarket operations in the country and the evolution of some "colmados" into small supermarkets (mini markets) have replaced some "colmados" and small stores (pulperías and ventorrillos). Supermarkets offer better selection, more product variety and better prices. Nonetheless, there are still many reasons, such as distance, quantity needed, and the "colmado"-customer relationship, which help the traditional system of wholesalers and/or "colmados" keep playing its role.

Appendix I shows a representative list of imported food and drink products that are part of the inventory of a typical "colmado".

III. COMPETITION

Food imports in the Dominican Republic from the United States are estimated a 35 %. European countries (Denmark, Norway, the Netherlands, Great Britain, Spain, France, etc.) represent 44%; Costa Rica and Mexico, 2% and 3%, respectively, and South America 10%.

Table 3.a. COMPETITION FOR DOMINICAN IMPORT FOOD MARKET FOR CY 2001

COUNTRY	VALUE (US$1000)	PERCENTAGE
United States	111,694.00	35.08
Denmark	49,740.00	15.62
Netherlands	24,419.00	7.67
Spain	14,974.00	4.70
Colombia	12,931.00	4.06
Chile	12,699.00	3.99
New Zealand	12,094.00	3.80
Mexico	9,904.00	3.11
Ireland	6,506.00	2.04
Germany	5,998.00	1.88
Venezuela	5,344.00	1.68
Costa Rica	5,308.00	1.67
Italy	5,120.00	1.61
France	5,084.00	1.60
United Kingdom	3,797.00	1.19
Austria	3,484.00	1.09
Australia	3,221.00	1.01
Others	26,045.00	8.18
TOTAL	**318,362.00**	**100.00**

Source: UN Trade Database, 2002

In the past few years imports from South America, Central America and the Caribbean have slightly increased. Two free trade agreements between the Dominican Republic and Central America, and between the Dominican Republic and the Caribbean are to be implemented.

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. PRODUCTS THAT HAVE SHOWN THE HIGHEST AVERAGE GROWTH (CY 1997-2001)

PRODUCT	AVERAGE PERCENTAGE GROWTH (CY 1997-2001)
1. Red meats Fresh/Chilled/Frozen	108
2. Wine & Beer	55
3. Nursery products and Cut Flowers	46
4. Red Meet-Prepared/Preserved	38
5. Pet Foods-Dogs/Cats	25
6. Fresh Fruits	24
7. Fruit and Vegetable Juices	21
8. Tree Nuts	16
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

The only barriers to imports are those established by the World Trade Organization concerning staple food products. These are managed through import quotas. The country is trying to restrict imports based on discretionary import permits to protect local producers.

V. POST CONTACT AND FURTHER INFORMATION

FOREIGN AGRICULTURAL SERVICE
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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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SECRETARIAT OF STATE FOR INDUSTRY & COMMERCE
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APPENDIX I
A REPRESENTATIVE LIST OF IMPORTED FOOD AND DRINK PRODUCTS IN A TYPICAL "COLMADO" (SEPTEMBER 2002)

No.	TYPE	BRAND	ORIGIN
1	FRUIT COCKTAIL	LYBBI'S	SOUTH AFRICA
2	BEER	LOWENBRAU	GERMANY
3	BEER	BECK'S	GERMANY
4	SARDINES	BLUES SWICK	CANADA
5	SPARKLING WATER	CLEARLY CANADIAN	CANADA
6	WINE	CONCHA Y TORO	CHILE
7	WINE	SANTA RITA	CHILE
8	WINE	GATO NEGRO	CHILE
9	WINE	VIÑA TARRAPACA	CHILE
10	PEAS	MALLOA	CHILE
11	MUSHROOM	ROLANDS	CHINA
12	ASPARAGUS	ROLAND	CHINA
13	CHOCOLATES	COSTA VIZZIO	COLOMBIA
14	CHOCOLATES	TAPITA. EL GALLITO	COSTA RICA
15	PUNCH	KUBA	CURAZAO
16	MILK	MILEX	DENMARK
17	TUNA	STAR KIST	ECUADOR
18	JUICE	PETIT	EL SALVADOR
19	WHISKY	PINCK	SCOTLAND
20	WHISKY	DEWARD'S	SCOTLAND
21	WHISKY	JOHNNIE WALKER	SCOTLAND
22	WHISKY	VAT 69	SCOTLAND
23	WHISKY	SOMETHING SPECIAL	SCOTLAND
24	WHISKY	CHIVAS REGAL	SCOTLAND
25	WHISKY	JB	SCOTLAND
26	OLIVE OIL	FIGARO	SPAIN
27	OLIVE	LA ESPAÑOLA	SPAIN
28	HAM	EL CID	SPAIN
29	OLIVE OIL	GOYA	SPAIN
30	SPAGUETTIS	GALLO	SPAIN
31	CIDER	JAI ALAI	SPAIN
32	CIDER	ASTURIANA	SPAIN
33	OLIVE	LA ESPAÑOLA	SPAIN
34	ANCHOA OLIVE	LA ESPAÑOLA	SPAIN
35	CHAMPIGNON	CHAMPIZZA	SPAIN
36	OLIVES	FIGARO	SPAIN
37	CHERRY	HELIO	SPAIN
38	RED PEPPER	ROLAND	SPAIN

APPENDIX I (Cont.)

39	SALT	CAREY	SPAIN
40	VODKA	FINLANDIA	FINLAND
41	ENERGY DRINKS	BATERY	FINLAND
42	LIQUOR	ALIZE	FRANCE
43	MINERAL WATER	VITTEL	FRANCE
44	LIQUOR	COINTREAU	FRANCE
45	WINE	FREXINET	FRANCE
46	MILK	ALASKA	HOLLAND
47	MILK	KANNY	HOLLAND
48	CHEESE	LA CAMPIÑA	HOLLAND
49	GOUDA CHEESE	HOLLANDIA	HOLLAND
50	GOUDA CHEESE	WONK	HOLLAND
51	WHISKY	CUTTY SARK	ENGLAND
52	ICE CREAMS	MAGNUM	ENGLAND
53	WHISKY	CUTTY SARK	ENGLAND
54	GIN	BEEFEATER	ENGLAND
55	LIQUOR	BAILEY	IRELAND
56	LIQUOR	AMARETO	IRELAND
57	MINERAL WATER	PERRIER	ITALY
58	ANISE	ROMANIA	ITALY
59	LIQUOR	EVANGELICO	ITALY
60	TOMATO CANNED	CIRIO	ITALY
61	TUNA	SHERY STAR	JAPAN
62	BEER	CORONA	MEXICO
63	TEQUILA	JOSE CUERVO	MEXICO
64	TEQUILA	CAMINO	MEXICO
65	TEQUILA	SAUZA	MEXICO
66	SARDINE	DELMONTE	PANAMA
67	SAUSAGE	GOYA	PUERTO RICO
68	VODKA	STOLICHNAYA	RUSSIA
69	SOUP	ROLAND	SINGAPUR
70	VODKA	ABSOLUT	SWITZERLAND
71	PEANUTS	NUT WALKER	THAILAND
72	SARDINE	KING BELL	THAILAND
73	SARDINE	ROLAND	THAILAND
74	FRUIT JUICE	MOTT'S	USA
75	FRUIT JUICE	OCEAN SPRAY	USA
76	JUICE	SNAPLE	USA
77	JUICE	MISTIC	USA
78	JUICE	GATORADE	USA

APPENDIX I (Cont.)

79	JUICE	WELCH'S	USA
80	LIQUOR	KAHLUA	USA
81	CRACKER	OREO	USA
82	CRACKER	RITZ	USA
83	CHOCOLATE	MOM'S	USA
84	CHOCOLATE	3 MUSKETEERS	USA
85	CHOCOLATE	MARS	USA
86	CHOCOLATE	TWIX	USA
87	CHOCOLATES	MILKYWAY	USA
88	CHOCOLATES	SNICKERS	USA
89	SOUP	CAMPBELL	USA
90	CANNED BEAN	GOYA	USA
91	VINEGAR	HEINZ	USA
92	SALT	CAREY	USA
93	TOMATO PASTE	ARTURO	USA
94	RAISIN	LIGO	USA
95	SNACKS	PRINGLES	USA
96	PEANUTS	PLANTERS	USA
97	WINE	NIGHT TRAIN	USA
98	ICE CREAMS	DOVE	USA
99	CANNED SPAGHETTI	LIBBY'S	USA
100	CHICKEN SAUSAGE	LYBBI'S	USA
101	VINEGAR	MUSELLMAN	USA
102	CHOCOLATE	NESTLE	USA
103	CHOCOLATE	CRUNCH	USA
104	CEREAL	CAP CRUNCH	USA
105	CHILLI	WRINGLEY'S	USA
106	ICE CREAMS	MEGA	USA
107	WINE	CARLO ROSSI	USA
108	MACARRONI	KRAFT	USA
109	PET FOOD	PEDIGREE	USA
110	CEREAL	BEST	USA
111	PANCAKE	CONTRYBEST	USA
112	FRUIT JUICE	SPLASH V8	USA
113	SYRUP	COUNTRYBEST	USA
114	SWEET CORN	LIBBY'S	USA
115	SPICE SAUCE	GOYA	USA
116	RAVIOLI	CHEF BOYARDI	USA
117	SPICE SAUCE	TABASCO	USA
118	BBQ SAUCE	HEINZ	USA

APPENDIX I (Cont.)

119	GRAVY	RAGU	USA
120	CHICKEN NOODLE	HEINZ	USA
121	SUGAR	EQUAL	USA
122	TUNA	DELMONTE	VENEZUELA
123	BABY FOOD	HEINZ	VENEZUELA
124	ENERGY DRINKS	CICLON	VENEZUELA

Source: Developed by the Authors

APPENDIX II
MAJOR FOOD IMPORTERS/DISTRIBUTORS IN THE DOMINICAN REPUBLIC

MAJOR SUPERMARKETS

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HIPER MERCADOS OLE S.A.
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APPENDIX II (CONT.)

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APPENDIX II (CONT.)

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Juan Enrique Ramos, General Manager
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APPENDIX II (CONT.)

MEAT IMPORTERS

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Duniesky Rodríguez, V.President
Autopista Duarte Km. 17 1/2
Santo Domingo, D.R.
Tel: (809) 372-7301
Fax: (809) 372-7302
E-mail: dunrod@codetel.net.do

DEMETRIOS GOURMET
Pascual Prota, President
Leo Leon, Gral. Manager
Calle Victor Garrido Puello #1 37
Ensanche Evaristo Morales
Santo Domingo, D. R.
Tel: (809) 563-8777
Fax: (809) 563-8775

CARNES SELECTAS NELLOS
Sebástian Cardella, President
Dr. Luis F. Thomen # 165
Ensanche Evaristo Morales
Santo Domingo, D.R.
Tel: (809) 565-1268
Fax: (809) 567-4470

CONGELADOS DEL CARIBE
Miguel Paulino, General Manager
Ave. Monumental No. 24
La Yuca
Santo Domingo, D.R.
Tel: (809) 922-8585
Fax: (809) 922-8800/8687
E-mail: congeladosdelcaribe@hotmail.com

WINE/LIQUOR IMPORTERS

EL CATADOR, S. A.
Guiseppe Bonarelli, President
Guiseppe Bonarelli, Hijo, General Manager
Calle Virgilio Díaz Ordoñez # 43
Ensanche Evaristo Morales
Santo Domingo, D.R.
Tel: (809) 540-1641/42/43/44
Fax: (809) 566-3704/540-1688
E-mail: elcatador@codetel.net.do

**MARCAS PREMIUM/
CAVAS DEL MUNDO**
Kenneth Broder, President
Ave. Abraham Lincoln #1061
Ensanche Piantini
Santo Domingo, D.R.
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Fax: (809) 566-7766
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APPENDIX II (CONT.)
WINE/LIQUOR IMPORTERS (CONT.)

SUAREZ HNOS., C. x A.
Alfredo Suárez, President
Calle Charles Lindberg No. 1
Santo Domingo, D.R.
Tel: (809) 567-4221, Fax: (809) 565-8592

BODEGAS BARCELO, C. x A.
Julián Barceló Vallejo, President
Autopista Duarte Km. 18
Santo Domingo, D.R.
Tel: (809) 545-2000, Fax: (809) 473-1414
E-mail: bjulianbarcelo@codetel.net.do

VINOS, S. A.
Franklin Báez Brugal, President
Av. Rómulo Betancourt # 355
Ensanche Bella Vista
Santo Domingo, D.R.
Tel: (809) 532-1566, Fax: (809) 532-0076
E-mail: vinos.sa@codetel.net.do

DIAGEO DOMINICANA, S.A.
Jose Jimenez, General Manager
Distributor Division
Calle El Seibo esq. Ave. San Martín # 5
Santo Domingo, D.R.
Tel: (809) 689-8103, Fax: (809) 682-0396
E-Mail: josejimenez@diageo.com

PASTORIZA, C. x A.
Guillermo Henrique Alvarez, General Manager
Av. Lope de Vega# 28/ Rafael A. Sánchez
Santo Domingo, D.R.
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Fax: (809) 565-6718/559-8888

RENI, S.A.
Edmundo Valle, President
Calle Fontaine Bleau # 10 Jardines del Norte
Santo Domingo, D.R.
Tel: (809) 565-7364, Fax: (809) 565-0848
E-mail: reni.sa@codetel.net.do

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Ave. Luperón esq. Prats Ramírez #100
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VINICOLA DEL NORTE, S.A.
Carlos Vera, General Manager
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CHEESE IMPORTERS

ANACAONA & LONJEFF, S.A. (KRAFT)
Jeffrey Berry, General Manager
Calle 3era. # 18
Herrera
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