

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Required Report - public distribution

Date: 12/27/2017

GAIN Report Number: DR1718

Dominican Republic

Retail Foods

Diverse Retail Sector Facilitates Fifth-Largest Market for U.S. Consumer-Oriented Products in Latin America

Approved By:

Lisa Ahramjian, Agricultural Attaché

Prepared By:

Mayra Carvajal, Agricultural Marketing Specialist

Report Highlights:

The Dominican Republic is one of the most dynamic economies in the Caribbean region. With U.S. consumer-oriented product exports reaching \$484 million in 2016, the country represents the fifth-largest market for such products in Latin America. The Dominican modern retail sector offers a wide variety of U.S. products, is dominated by locally-owned companies, and is growing rapidly. However, despite the prominence and growth of local supermarket chains, they only account for 20-25 percent of retail sales. The majority of sales are still in the traditional channel, which includes neighborhood stores (colmados) and warehouses and offers largely local products.

Post:

Santo Domingo

SECTION I. MARKET SUMMARY

The Dominican Republic (DR) is one of the largest and most stable economies in Central America and the Caribbean. With U.S. consumer-oriented product exports reaching \$484 million in 2016, the country represents the fifth-largest market for such products in Latin America. For general information on the Dominican market, please refer to Post's 2017 Exporter Guide, DR1717.

The Dominican retail sector can be divided into two distinct segments or channels; the modern and the traditional. The modern retail distribution channel is comprised of three main components: supermarket chains, independent supermarkets, and convenience stores known as "food shops." Supermarket chains dominate this segment and offer a wide variety of U.S. products. However, despite their prominence and growth, only 20-25 percent of retail sales are via the modern retail channel.

The traditional retail channel is subdivided into two main components: neighborhood stores known as "*colmados*" and walk-in food warehouses known as "*almacenes*" located mainly in traditional street markets. In addition to direct sales to the public, *Almacenes* also serve as suppliers to *colmados*. It is estimated that 70-80 percent of retail food sales are recorded by the traditional retail channel.

Supermarkets and International Retailers

Supermarket Chains: The number of Dominican supermarket operators has doubled over the last 20 years. Supermarkets are concentrated in the greater Santo Domingo area and other large urban areas. There are currently approximately 120 supermarkets nationwide; key players include: **Grupo Ramos** (La Sirena, Pola and Aprezio Supermarkets), **Centro Cuesta Nacional** (Nacional Supermarkets, Jumbo, Jumbo Express, Cuesta Librería and Cuesta Centro del Hogar), **Plaza Lama** (Plaza Lama, Super Lama, and ElectroLama), **Bemosa** (Bravo Supermarkets), **MercaTodo** (La Cadena Supermarket), **PriceSmart**, the Dominican Hypermarkets Company (Compañía Dominicana de Hipermercados) **Carrefour**, and **Olé Hypermarkets**. Description of some of these companies is further described in the company profiles below. **Super Fresh** is an important high-end grocery store in Santo Domingo and **Los Iberia** and **Zaglul** are important regional chains serving the eastern Dominican Republic. Of all these groups, Grupo Ramos has the biggest reach and claims to be the largest employer and tax payer in the food retail sector.

Independent Supermarkets: The second component of the modern food retail channel is made up of the independent supermarkets. With more than 40 points of sale, the majority are based in Santo Domingo and Santiago, the two largest cities in the country. Most of these independent supermarkets have joined together in an umbrella group known as the National Union of Low-Cost Supermarkets (UNASE). According to UNASE, its members tend to target the medium- and lower-income segments of the population. There is some coordination on imports but members are still purchasing imported products on their own and mainly from independent importers. However, UNASE has expressed interest in establishing import capacity to allow its members to make joint purchases and take advantage of the benefits provided by the U.S.-Dominican Republic-Central America Free Trade Agreement (CAFTA-DR). UNASE is active in helping its members attend international trade shows in order to help members scout new products and suppliers.

Convenience Stores: The last component of the modern food retail channel is comprised of "food shops" or "gas marts." These convenience stores are mainly located in gas stations and focus on pre-packaged and ready-to-eat foods and beverages. They offer a high portion of U.S. brands (some

produced outside the United States), including snacks, sodas, other non-alcoholic beverages, rum, wine, and beers. Customers generally only purchase food and drink to consume in this inexpensive and social environment. There are no regional or national chains in this sub segment.

The Traditional Retail Channel

The traditional food retail channel is made up of the two oldest retail models in the DR: the “*colmados*” or the neighborhood grocery stores (i.e., mom and pop stores) and the walk-in food depots or warehouses known as “*almacenes*.”

In the DR, the *colmado* is the cornerstone of retail food distribution. As with the modern retail segment, these stores have increased their product and service offerings to accommodate a wider audience. *Colmados* have expanded, moving from offering an average of 300 products previously to over 1,500 products in their larger establishments. While focusing on the middle- and lower-income segments of the population, *colmados* provide a variety of additional services, which may include financing options, direct loans, and delivery services. In addition, many *colmados* function as bars and operate slot machines or other entertainment options.

Given the lower level of formality in this sector, there is almost no statistical information available on sales and operations. Industry sources estimate that there are 50,000 *colmados* around the country and that they serve as a major source of informal employment in both rural and urban areas. Though they are mainly individually-owned, there is at least one case in which a single person owns fifty *colmados* (similar to a franchising operation).

Finally, there are the walk-in food depots or warehouses known as “*almacenes*.” These businesses, located mainly in street markets, are the main wholesale suppliers for the *colmados*. However, *almacenes* also serve individual customers. Just like the *colmados*, they exhibit a high degree of informality and low levels of concentration, and there is very little information available regarding their operations and sales. These walk-in warehouses sell with a relatively high margin (estimated at up to 18 percent) and the top 20 *almacenes* represent up to 70 percent of the total sales volume. Some of these wholesalers have larger purchasing volumes than retailers in the modern segment. The principal players in this segment include: Hermanos Jeréz, Casa Evelyn, Marte y Reyes, Hermanos Guzmán, Chavón, Casa Madeline, Pérez Mata, Eufemio Vargas, Grupo Nacional de Distribución, Catell, Kardisa, Hermanos Leroux, Max Distribución, Samuel Abreu, and Hermanos García.

ADVANTAGES AND CHALLENGES

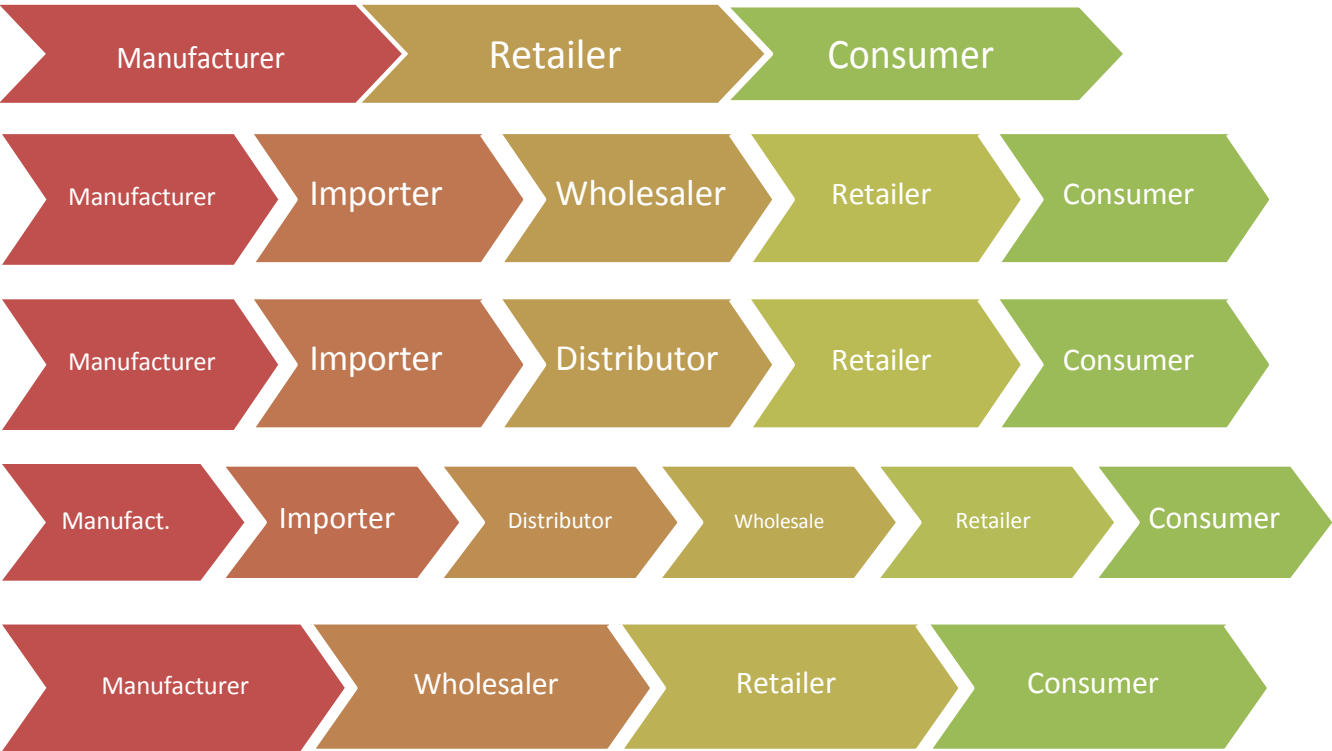
Advantages	Challenges
1. The implementation of CAFTA-DR, which has lowered or eliminated duties on nearly 80 percent of products.	1. Competition from other CAFTA-DR signees, and other countries that have implemented free trade agreements with the Dominican Republic.
2. A large and growing tourist population which demands high value food products.	2. Tariff rate quotas, safeguards and other CAFTA-DR provisions that protect local producers of rice, meat (beef, poultry and pork), dairy products, beans, garlic, and onions.
3. A growing number of consumers demanding higher quality and healthier products; they generally perceive that the U.S. products meet their requirements.	3. Requirement that U.S. products comply with Spanish language labeling requirements.
4. Efficient food distribution channels, with the construction of new highways and the modernization of seaports and airports facilitating the flow of imported food products.	4. Cold chain limitations.
5. Consumers greatly influenced by U.S. culture, with a positive perception of U.S. products.	5. Required import permits for some products.
6. The proximity of the Dominican Republic to the United States and strong bilateral relationships throughout the public and private sectors, which facilitates trade.	6. 18 percent VAT and high internal logistic costs.
7. Growing population in urban centers and increased rate of employment.	7. A lack of transparency and corruption which continue to earn the DR relatively low scores in international comparison tables (DR was 99 th out of 190 countries in the World Bank's 2018 "Ease of Doing Business" ranking).
8. A Dominican diaspora in the U.S. of approximately one million persons, clustered primarily in the northeastern states and Florida, whose remittance payments help support the Dominican economy.	8. A lack of institutional continuity across changes in government administrations.

SECTION II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

Key Factors for Successful Entry

Given the diversity and rapid rate of change within the Dominican retail sector and the broad mix of domestically produced and imported products, there are many avenues for product entry. Several of the large (and modern) retail chains are active in directly sourcing products, which generally involves few intermediaries. However, given the prevalence of low purchase volumes in some specialty products, specialization among importers, and the prominent role played by freight consolidators, it is more common that multiple intermediaries are involved in product importation and placement. Common combinations in this sector, depending on the chain and product, may include:



2.1. Market Structure

Major Trends

Over the last three decades, the Dominican retail sector has undergone significant changes. This transformation took place in response to sustained economic growth and has been reflected in evolving retail formats, store sizes, and diversification of products and services offered.

During that time, supermarkets developed from average store sizes of 200-500 square meters (in the early 1990s) up to sizes of 10,000 square meters in the early 2000s. This growth in size was due to a focus on serving the expanding urban middle and upper middle classes, which were experiencing rapid increases in income. In recent years, however, supermarket chains are turning their attention towards the lower-income sectors, which make up close to 50 percent of the population. This has resulted in the construction of smaller stores (approximately 3,000 square meters), which offer mainly perishable foods and home supplies.

This expansion in store size and number of outlets also means a greater selection of products for consumers. Supermarkets have increased their item selections from 30,000 products in the 1990s to up to 85,000 products (during the high season) in recent years. There has also been an expansion in the availability of non-grocery goods and services for supermarket clients to facilitate “one stop-shopping.” Goods and services such as banking, household appliances, fast food, telecommunications, and pharmacies are now commonly co-located with supermarkets.

In a related development, supermarket chains now offer an increasing number of products under their own brands. Consumers have benefited from special promotions and lower prices as stores seek to attract customers for these products. While there has been a negative impact on some local product manufacturers, who have seen their revenue decrease by up to 15 percent, this development also offers an opportunity for private label manufacturers. One of the most active supermarkets in the country has recently started using U.S. products in some of their private label products.

Meanwhile, substantial changes have also been seen among smaller retail operations such as the “*Colmados* and *Colmadones*” (neighborhood stores or mom and pop stores). These outlets have also increased in number and product offerings, including domestic and imported products as well as services, to their clientele.

Company Profiles

As previously noted, there are eight main supermarket chains in the DR. Each is briefly described below:

Grupo Ramos: The DR’s biggest hypermarket chain has a total of 59 stores in different formats around the country, which are six more stores than in 2016. The largest format is La Sirena hypermarket, which caters to middle-income consumers, offers a wide range of U.S. products, and is a one-stop shop (also contains non-grocery items). The medium format Pola supermarket also serves middle-income consumers and offers a wide variety of U.S. products such as meat, fish, cereals, snacks, cheeses and other dairy products. Finally, Grupo Ramos has convenience stores, A Prezio, which caters more to low-income consumers. Grupo Ramos has its own brand, as well as two exclusive brands.

Centro Cuesta Nacional (CCN): As the second-largest supermarket chain, CCN has a total of 30 stores in different formats. In 2017, it opened one of the largest stores in Puerto Plata, a major and growing touristic area in the north. The largest format at CCN is Jumbo hypermarkets, which focuses on middle- and high-income consumers. The medium-size format is Nacional supermarket, which serves the same income levels and is one of the oldest markets of its kind. The smallest format is Jumbo Express, which caters to the lower-income segment. Across all CCN stores, key U.S. products include: meat, dairy, fruits, vegetables, and a variety of processed products. They have a locally produced private label. CCN has developed its own brand for breads and pastries as well as a private label.

Supermercados Bravo: This Company has 11 supermarkets, 10 in Santo Domingo and one in Santiago. This company achieved a 50 percent growth in its number of stores in 2017, partly due to its extended hours service implemented this year. Bravo caters to middle-income consumers and also serves lower-income consumers through weekly discounts. Key U.S. products include sausages, cured

meats, frozen and specialty products, and California wines. Supermercados Bravo has an in-house cheese factory and a bakery. Bravo is increasingly marketing products under a private label.

Plaza Lama: This chain caters to the middle- and lower-income consumers. Representatives from frequently participate in U.S. food shows in order to increase their business contacts. Key U.S. products include processed products, cereals, dairy and meat.

Mercatodo: Supermercados La Cadena serves the more the middle- and high-income consumers. They have some smaller stores that focus on high-quality products. Key U.S. products include poultry, shrimp, rice, and beans.

PriceSmart: This warehouse outlet/club has two big stores in the Santo Domingo area and one in Santiago. Both stores serve middle- and high-income consumers who are seeking volume discounts on its products, a majority of which are from the United States. Key U.S. products include meat, fish, seafood, fresh fruits and vegetables, cheeses, hams, sausages, cereals, oils and butter, and snacks. PriceSmart rents space in their stores to other businesses which provide additional services to its customers, such as banking and utility payments. Customers must pay an annual membership fee.

Carrefour: This French international franchise has its regional headquarters in Martinique and two stores in the DR, both in Santo Domingo. Its first store attracts many customers from lower and mid-income levels and is strategically located on one of the most important highways in the country, the *Autopista Duarte*. The second store, which opened very recently, caters to higher income customers and serves a very important residential area within the heart of downtown Santo Domingo. Carrefour carries approximately 50,000 products, including many imported and local products through foreign brands, local brands, and private labels. Key U.S. products include yogurt, cheese, wine, whiskey, juices, turkey, meat, frozen products, fruits, vegetables, ice cream cones, organic products, and gluten-free products.

Super Fresh: This market caters to the high-income segment of the population in Santo Domingo and features a wide variety of imported products, including a wide selection of ingredients for international dishes, organic products, gluten-free products, and other specialty products. Additionally, the market has a large bakery and kitchen, with an on-site café and juice bar and a wide variety of prepared foods. Key U.S. products include meat, seafood, specialties pates, cheeses, yogurts, juices, fruit and vegetables among other high-end products.

Iberia and Zaglul: These stores primarily serve low- to middle-income consumers in the DR's eastern provinces. There are opportunities for U.S. products in these markets, especially due to the tourism focus in this region.

Major supermarket chains in Dominican Republic, 2017

Name	Ownership	Outlets	Location	Purchasing agent
-------------	------------------	----------------	-----------------	-------------------------

Name	Ownership	Outlets	Location	Purchasing agent
La Sirena	Dominican (Grupo Ramos)	25	Santo Domingo, Santiago, Puerto Plata, La Vega, San Francisco, San Cristóbal, Bonao, Higüey, Moca, La Romana and Baní	Direct importers and distributors
Supermercado Pola	Dominican (Grupo Ramos)	9	Santo Domingo, Bávaro, Las Terrenas and Sosúa	Direct importers and distributors
Aprezio	Dominican (Grupo Ramos)	25	Santo Domingo, Santiago, Cotuí and Boca Chica	Direct importers and distributors
Supermercados Nacional	Dominican (Centro Cuesta Nacional)	14	Santo Domingo, Santiago, La Romana and Punta Cana	Direct importers Wholesalers/ distributors It is also a member of the Topco Associates in the U.S.
Jumbo	Dominican (Centro Cuesta Nacional)	12	Santo Domingo, La Romana, San Pedro, Santiago, Moca, La Vega, Higüey, Bávaro and Puerto Plata	Direct importers Wholesalers/ distributors It is also a member of the Topco Associates in the U.S.
Jumbo Express	Dominican (Centro Cuesta Nacional)	4	Santo Domingo	Direct importers Wholesalers/ distributors It is also a member of the Topco Associates in the U.S.
Supermercados Bravo	Dominican	11	Santo Domingo, Las Américas (Zona Oriental), Las Colinas and Santiago	Direct importers and distributors
Supermercados Plaza Lama	Dominican	11	Santo Domingo, Bávaro and La Vega	Direct importers and distributors
Supermercados La Cadena	Dominican (MERCATODO)	10	Santo Domingo	Direct importers and distributors
Pricesmart Warehouse	U.S./ Dominican	3	Santo Domingo and Santiago	Direct importers and distributors
Carrefour	French	2	Santo Domingo	Direct importers and distributors

Name	Ownership	Outlets	Location	Purchasing agent
Superfresh	Dominican	1	Santo Domingo	Direct importer and distributor
National Assoc. of Small Supers (UNASE)	Dominican	40	Major cities	Direct importers and distributors

Source: FAS/Post based on interviews and research

NUMBER OF SUPERMARKETS BY SIZE (Sq Mts) & OWNERSHIP			
(Qty of Point of Sales)			
	POS Large (4,500-5,000 sq mts)	POS Med (1,500- 4,500)	POS Small (less than 1,500)
GRUPO RAMOS	20	14	25
GRUPO CCN	24	2	4
BRAVO (GRUPO BEMOSA)	11	0	0
PLAZA LAMA	7	4	0
LA CADENA (MERCATODO)	0	10	0
PRICESMART	3	0	0
CARREFOUR (CIA DOM HIPERMERCADOS)	2	0	0
SUPERFRESH	0	1	0
SUPERMERCADOS IBERIA	2	3	0
SUPERMERCADOS ZAGLUL	0	6	0

Source: Diseño y Reingeniería Comercial & Post interviews to supermarkets

Key considerations to help U.S. suppliers interested in entering the Dominican market are provided below for the modern and traditional marketing channels.

For the modern food retail channel (supermarkets and convenience stores):

- Define the real size of the market.
- Identify competitors, strengths and weaknesses.
- Create a sales plan (projections and expenses)
- Evaluate the likely participation of intermediaries (wholesalers, distributors, or importers), and determine the most effective/promising avenue of entry for your product.
- Define a clear and effective strategy.
- Be aware that some retail chains ask for a fixed investment in order to guarantee product placement. In some cases, those investments amount to between 10 - 15 percent of anticipated sales.
- Estimate between 10 - 15 percent as a profit margin for the retail partner.
- Clearly define the pricing policies for the product portfolio.

Given their growth in importance, supermarket chains have become more sophisticated in their negotiations with new suppliers. The most common requirements from supermarket chains for new product placements include:

1. Presentation of the product's organoleptic characteristics.
2. Profile, samples, and samplings of the brand.
3. A marketing plan for the brand.
4. Approval by the retailer's New Products Committee.
5. Payment for the introduction of new products.
6. Definition of a commission for logistical expenses (usually 3-5 percent).
7. Fixed discount for visibility of brand (may be as high as 20 percent).
8. Policy of support for activities such as:
 - a. Seasonal promotions
 - b. Thematic promotions

- c. Sponsorship of internal activities
- d. Support for opening of new points of sale
- e. Payment for presence of promoters

9. Policies on returns and Policies on 90-day payments.

For the traditional retail channel (*colmados* and *almacenes*):

- Define the sales strategy to be used.
- Always use more than one company for distribution and sales activities. Even so, it is very difficult to reach all *colmados*.
- Diversify sales, taking into consideration the DR's 20 main warehouses, each of which has strong influence over their clients due to preferential pricing, credit facilities, and ease of delivery.
- Identify competitors, strengths, and weaknesses.
- Develop a defined sales plan (projections and expenses).
- Consider establishing an incentives model.
- Design a support model targeted to the independent owners of *colmados*.
- Limit credit policies.
- Seek protection from losses due to theft, improper use of promotions, returns, sponsorships, or other promotional activities.

Note: Responsibility for any activities should be clearly outlined in the contract with the intermediary/importer. Frequently, the producer assumes responsibility for samples, marketing plan, promotions, and exhibitions. Accordingly, the intermediary assumes responsibility for sales, trade marketing, and handling of low stock levels (out-of-date products and losses).

SECTION III. COMPETITION

U.S. products have the largest market share in each of the products highlighted below. However, the United States competes with the European Union for dairy products and meat; local industry for poultry, fruit, and vegetables; and a few key regional agricultural suppliers for specific products.

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
------------------	----------------------	-----------------------------------	---

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Dairy Products (Cheese)	United States: 47 percent (approx. value) Netherlands: 19 percent Spain: 12 percent	The United States is able to provide the varieties of cheese consumed in the country. Both U.S. and European suppliers benefit from meeting tourist expectation for familiar products.	While the local dairy industry largely supplies the fluid milk demand, domestic cheese is not currently comparable to imported cheese due to differences in variety, quality, and sanitary factors.
Meat of Bovine Animals, Fresh or Chilled	United States: 99 percent is basically the main imported meat source for the Dominican Republic. Germany and Spain: remainder	The United States benefits from its geographic advantage and high product quality, as well as the DR's preference for Certified Angus Beef in both food service and retail establishments.	Existing production is not sufficient to meet the local demand, which creates opportunities for imports. Select slaughterhouses are seeking equivalence to be able to ship products to the United States, particularly Puerto Rico.
Edible Vegetables and Certain Roots and Tubers	United States: 65 percent China: 14 percent Netherlands, Canada,, European, Central and South American countries: remainder	The United States benefits from its product quality.	Local suppliers are working to address pest management, food safety, and other challenges. USDA has been assisting in these areas to increase the productivity and exports of Dominican cacao, pineapple, avocado, greenhouse vegetable, and oriental vegetable value chains via a Food for Progress program for the past few years.
Apples , Pears and Quinces	United States: 92 percent Chile: 8 percent	In apples, United States' quality and geographical advantage is a major advantage, with Chile entering the market counter-seasonally. Chile is more competitive in pears and quinces due to its climate.	Imported seasonal fruits are always a leading commodity in the market (including grapes and nectarines), mainly since the country is not a competitive producer given the tropical climate.

Product Category	Major Supply Sources	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Potatoes (other than Sweet Potatoes) Fresh or Chilled	United States: 65 percent Canada: 23 percent Germany: 7 percent Netherlands: remainder	U.S. potatoes benefit from its wide variety and excellent taste. Potatoes USA's strong presence in the market has helped to improve its market share, especially in frozen fries in the food service sector.	High level of seasonal protection to local producers.

Of all of the commodities, U.S. cheese faces the largest competition. While the domestic market is not currently able to produce products that are comparable to those imported, U.S. cheese competes with several European countries, including The Netherlands, Spain, Germany, and the United Kingdom (see Tables 1 and 2).

Table 1: Volume of Cheese and Curd (0406) Exports to the DR, Calendar Year 2011 – 2016

Reporting Country	Volume (Tons)					
	2011	2012	2013	2014	2015	2016
United States	4,263	3,542	4,993	4,415	4,864	6,306
Netherlands	1,562	1,528	1,455	1,652	1,985	2,554
Spain	379	452	792	958	1,417	1,645
Germany	68	70	58	131	131	945
United Kingdom	-	-	-	20	229	826
Denmark	162	145	192	244	300	361
Belgium	-	20	-	33	100	259
France	131	111	114	118	135	243
New Zealand	230	178	161	171	207	241
Italy	87	85	73	109	112	165

Data Source: Global Trade Atlas

Table 2: Value of Cheese and Curd (0406) Exports to the DR, Calendar Year 2011 – 2016

Reporting Country	United States Dollars					
	2011	2012	2013	2014	2015	2016
United States	18,754,925	17,106,224	23,148,138	22,406,497	22,972,815	27,612,108
Netherlands	9,762,520	9,123,259	9,070,069	11,100,036	9,494,705	11,456,531
Spain	2,755,283	2,578,980	4,534,642	5,991,442	7,007,622	7,802,960
Germany	505,283	513,247	453,878	852,241	699,302	3,310,325
United Kingdom	-	-	-	82,921	879,125	2,770,877
Denmark	1,100,552	896,554	1,425,590	1,607,761	1,506,776	1,795,083
Italy	1,175,636	976,279	879,652	1,175,371	1,008,474	1,361,083
France	955,891	955,926	1,097,773	1,079,897	1,177,893	1,337,537
New Zealand	1,109,441	754,248	676,747	840,175	960,587	1,030,949
Belgium	-	83,459	65,602	142,493	302,570	735,636

Data Source: Global Trade Atlas



U.S. Exports Of Processed Food Products To *Dominican Republic*
CY 2013 - 2016
(In Thousands Of Dollars)

Export Market: *Dominican Republic*

Calendar Years (Jan-Dec)

Product	2013	2014	2015	2016
Beer & Wine.....	12,100	13,283	15,347	17,673
Beer.....	3,298	3,442	4,744	5,750
Wine.....	8,803	9,841	10,604	11,923
Distilled Spirits & Other Alcoholic Beverages.....	6,364	10,940	14,178	10,545
Distilled Spirits.....	6,122	10,690	13,690	9,437

Other Alcoholic Beverages.....	242	250	488	1,108
Baby Food.....	7,337	9,374	9,999	8,441
Chocolate and Confectionery.....	11,768	14,489	15,284	17,349
Chewing Gum.....	31	89	148	381
Chocolate.....	8,244	9,854	10,553	11,987
Sugar Confectionery.....	3,493	4,546	4,583	4,982
Condiments and Sauces.....	10,566	13,080	15,324	15,864
Jams & Jellies.....	574	449	481	623
Table Condiments (Incl. BBQ, Excl. Ketchup).....	8,084	10,274	12,106	12,204
Tomato Sauces & Ketchup.....	1,908	2,356	2,737	3,037
Dog & Cat Food.....	3,516	3,429	3,231	3,098
Fats & Oils.....	70,465	146,117	105,593	106,753
Animal Fats & Oils.....	6,984	6,887	7,448	5,478
Margarine.....	657	682	706	762
Olive Oil.....	338	89	45	82
Other Edible Fats & Oils (Incl. Mixtures).....	12,890	9,065	6,231	10,050
Soybean Oil.....	43,848	123,888	86,535	84,204
Vegetable Oils (Excl. Soybean).....	5,747	5,507	4,627	6,178
Food Preparations.....	98,418	72,424	54,041	59,849
Baking Inputs, Mixes & Doughs (Incl. Pudding).....	30,014	18,863	18,270	19,805
Flavoring (Vegetable Saps & Extracts).....	2,280	2,496	2,149	2,655
Other Processed Foods, Ingredients & Bvg Bases.....	59,407	43,322	27,059	30,381
Protein Concentrate.....	5,659	6,963	5,607	6,073
Thickener.....	1,058	780	955	935
Non-Alcoholic Beverages.....	19,976	23,719	30,913	32,263
Bottled Drinks (Incl. Soda, Juice Mixes, etc.).....	4,971	6,968	6,231	6,369
Dry Beverages (Coffee, Tea, Herbal, etc.).....	1,504	1,620	1,930	1,760
Juices.....	13,500	15,131	22,752	24,134
Pasta & Processed Cereals.....	65,544	42,104	10,754	11,416
Breakfast Cereals & Other Breakfast Products.....	63,647	39,426	8,139	7,811
Cereals (Excl. Breakfast Cereal).....	551	203	59	417
Pasta.....	1,346	2,474	2,557	3,188
Prepared/Preserved Meats.....	23,518	20,912	21,622	24,298
Other Prepared/Preserved Meats.....	3,735	3,876	3,357	3,535
Prepared/Preserved Beef.....	196	566	384	308
Prepared/Preserved Pork.....	3,633	3,654	5,410	7,065
Prepared/Preserved Poultry.....	15,954	12,817	12,470	13,390
Prepared/Preserved Seafood.....	3,508	4,389	3,536	5,159
Cooked & Prepared Shellfish.....	1,642	1,048	747	2,551
Dried, Salted, Brined or Smoked Fish.....	243	1,238	1,446	1,646
Frozen/Prepared Fish Roes & Livers.....	265	37	95	96
Meat & Fish Extract.....	242	420	15	0
Prepared/Packaged Fish & Seafood.....	1,105	1,626	1,091	842
Surimi & Minced Fish.....	11	20	142	25
Processed Egg Products.....	1,486	1,740	641	353
Cooked or Preserved Eggs (In Shell).....	64	22	9	9
Dried Eggs.....	490	532	126	14
Frozen Eggs.....	931	1,186	506	330

Processed Fruit.....	5,816	5,531	7,302	6,543
Canned Fruit.....	843	1,006	1,183	1,264
Dried Fruit.....	4,497	4,107	5,493	4,803
Frozen Fruit.....	476	418	625	477
Processed Vegetables & Pulses.....	8,678	14,173	17,194	17,278
Canned Vegetables & Pulses.....	2,118	6,773	9,313	9,524
Frozen & Dried Vegetables (Excl. Potatoes).....	2,486	3,380	4,703	2,949
Frozen French Fries & Other Potato Products.....	4,073	4,020	3,178	4,805
Processed/Prepared Dairy Products.....	62,195	69,212	46,953	49,024
Butter.....	2,830	1,307	337	506
Cheese.....	22,170	21,963	22,353	26,973
Cream & Powdered/Condensed Milk.....	24,966	33,521	16,496	14,329
Ice Cream.....	1,708	2,153	2,400	2,955
Whey Protein.....	7,786	7,211	2,612	1,595
Yogurt & Dairy Drinks.....	2,735	3,058	2,756	2,666
Snack Foods.....	35,244	23,959	15,435	19,302
Baked Snack Foods (Pastries, Pretzels, etc.).....	30,947	18,180	10,295	11,964
Mixes of Nuts & Fruit (Incl. Packaged Popcorn).....	3,153	4,339	3,711	5,134
Potato Chips.....	216	217	92	492
Prepared Peanuts & Peanut Butter.....	928	1,224	1,337	1,713
Soups.....	2,916	3,585	3,314	2,389
Spices.....	1,791	1,931	2,760	3,211
Syrups & Sweeteners.....	3,056	1,898	2,025	1,803
Fructose & Fructose Syrup.....	406	27	13	16
Glucose & Glucose Syrup.....	1,242	670	389	173
Honey.....	0	0	52	10
Lactose & Lactose Syrup.....	189	217	337	348
Maple Syrup.....	20	10	18	39
Molasses.....	11	8	9	3
Other Mixes of Syrups/Sugars.....	1,188	966	1,206	1,215
Processed Food Total (ag only).....	444,389	480,959	377,733	396,907
Processed Food Total.....	454,261	496,288	395,447	412,612

Prepared By: Global Policy Analysis Division/OGA/FAS/USDA

Source: U.S. Census Bureau Trade Data

Notes: The definition of "processed food" used in this table includes products that go beyond what USDA classifies as agricultural products. They are provided here as a convenience to the food industry and the public.
The "ag only" total processed foods category excludes distilled spirits, other alcoholic beverages, and prepared/preserved seafood.

www.fas.usda.gov/GATS

SECTION IV. BEST PRODUCT PROSPECTS

Industry sources indicate that the best product prospects in the Dominican retail sector include U.S. dairy products (cheese, yogurt, and milk powder), poultry, pork meat, beef, fresh fruit, processed vegetables, prepared foods, condiments and sauces, snacks, eggs and egg products, and fruit and

vegetable juices. There is also growth potential for existing and new alcoholic beverage brands within the distilled spirit, wine, craft beer categories.

SECTION V. POST CONTACT AND FURTHER INFORMATION

Foreign Agricultural Service (FAS/ USDA)

United States Embassy in the Dominican Republic
Ave. República de Colombia # 57, Santo Domingo, Dominican Republic
Telephone: 809-368-7654
E-mail: agsantodomingo@fas.usda.gov
Web page: www.fas.usda.gov

Please do not hesitate to contact this office for more detailed information about the Dominican food market, lists of importers, major players in the sector, and any other related questions.

QUALITATIVE DATA ON THE DOMINICAN RETAIL MARKET

Industry and Commerce Ministry of the Dominican Republic (MICM)

Edificio de Oficinas Gubernamentales Juan Pablo Duarte (7th floor)
Av. México esquina Leopoldo Navarro, Gazcue.
Santo Domingo, Dominican Republic
Telephone: 809- 685-5171 Ext.: 642 / Fax: (809) 686-1973
E-mail: info@mic.gob.do
<https://www.mic.gob.do/nosotros/publicaciones/tag/Informe>
<https://www.mic.gob.do>

Commercial Enterprises National Organization (ONEC)

Torre Bilmore, Suite 401
Ave. Abraham Lincoln No. 1003, D.N.
Santo Domingo, Dominican Republic
Telephone: 809-683-7229
Contact: Ms. Ana Ysabel Acosta de Tejada (Executive Director)
E-mail: anaysabel@onec.org.do
<http://www.onec.org.do/>

Importers and Warehouses Association (ASODAI)

C/ Luis Amiama Tió No. 80, Spring Center, Local 211
Arroyo Hondo, Santo Domingo, Dominican Republic
Telephone: 809-472-3030
Contact: Mr. José Antonio Alvarez Alonso Jr.
E-mail: jose@alvarezysanchez.com.do

National Union of Economic Supermarkets (UNASE)

Carretera Mella Km. 9, Santo Domingo Este, Dominican Republic
Telephone: 809-594-4097
Contact: Mr. Dionisio Quiñones
E-mail: cooperativaunase@gmail.com

National Federation of Retailers and Food Merchants (FENACODEP)

Prolongación Independencia No. 390, Urbanización Miramar, Aptdo Postal 6D. Santo Domingo, Dominican Republic

Telephone: 809-532-2240

Contact: Mr. René Japa

E-mail: fenacodep@claro.net.do; fenacodep01@hotmail.com

Dominican Institute for Quality Standards (INDOCAL)

C/ Oloff Palmer esq. Nuñez de Cáceres, San Gerónimo, Santo Domingo, Dominican Republic

Telephone: 809-686-2205 Ext.310

E-mail: servicioalcliente@indocal.gob.do

Web page: <http://www.indocal.gob.do>

National Institute for the Consumer Rights Protection (ProConsumidor)

Av. Charles Summer #33, Los Prados, D.N, Santo Domingo, Dominican Republic

Telephone: 809-472-2731

E-mail: jvalram@gmail.com

Web page: <http://proconsumidor.gob.do>