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Dominican Republic Retail Report- Annual Update 2015-2016

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Report Highlights:

The Dominican Republic is one of the most dynamic economies in the Caribbean region. With over $1.3 billion in U.S. agricultural products exports to the DR, the country represents the sixth largest market for U.S. agricultural products in Latin America. The Dominican retail distribution sector is dominated by locally owned companies and is growing rapidly. With a variety of formats, this sector features platforms designed to satisfy the needs of all consumer segments at all income levels.

General Information:
SECTION I. MARKET SUMMARY

Country Snapshot

EXECUTIVE SUMMARY

The Dominican Republic (DR) is located in the center of the Caribbean and shares the Island of Hispaniola with Haiti. It occupies two-thirds of the island, has a territory of 48,442 square kilometers and a population of 10 million, with an annual growth rate of around 1.5%.

With a Gross Domestic Product (GDP) of US$60.61 billion, the DR is one of the largest and most stable economies in Central America and the Caribbean. The economy grew by 4.1% in 2014, and average inflation for the last three years stands at around 4%, while the poverty rate has dropped from over 50% to under 40% during the last 5 years.

The local currency is the Dominican peso (RD$). The exchange rate (as of June, 2015) stands at RD$44.40 per US$1.00. Interest rates have remained stable over the last year with an average of 15% active interest rate, and 6.9% passive interest rate.

(*See the most recent Exporter Guide, Dominican Republic for further details)

SECTION II. ROAD MAP FOR MARKET ENTRY

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 1990's) up to sizes of 10,000 square meters in the early 2000's. 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 with an average size of around 3000 square meters, stores 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 1990's to up to 85,000 products (during the high season) in recent years. There has also been an expansion in availability of non-grocery goods and services for supermarket clients as "one stop-shopping" concept takes hold. Goods and services such as banking, household appliances, fast food, telecommunications and pharmacies are commonly co-located with supermarkets.

In a related development, super market chains now offer an increasing number of products under their own brand. 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 and opportunity for private label manufacturers.

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 evolved increase product offerings, including domestic and imported products as well as services, to their clientele.

Composition of the Retail Sector

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: super market chains, the independent super markets, and the convenience stores known as "Food Shops". Super market chains dominate this segment. Despite the prominence of local supermarket chains it is estimated that only 20-25% of retail sales in the Dominican Republic are posted via the modern retail channel.

The traditional retail channel is also subdivided in two main components: neighborhood stores known as "*colmados*", and "*almacenes*" or walk-in food warehouses located mainly in traditional street markets. *Almacenes*, in addition to direct sales to the public, serve as suppliers to *colmados.* It is generally estimated that about 60% of retail food sales are recorded by the traditional retail segment.

Supermarkets and International Retailers

The number of Dominican supermarket operators has doubled over the last twenty years. Supermarkets are concentrated in the greater Santo Domingo area and other large urban areas. There are currently 120 supermarkets nationwide and the main players include: ***Centro Cuesta Nacional*** (owners of Nacional Supermarkets, Jumbo, Jumbo Express, Cuesta Librería and Cuesta Centro del Hogar), ***Grupo Ramos*** (La Sirena, Pola and Aprezio Supermarkets), ***Plaza Lama*** (Plaza Lama, Suepr Lama, and ElectroLama), ***Bemosa*** (Bravo Supermarkets), ***MercaTodo*** (La Cadena Supermarket), ***PriceSmart***, the Dominican Hypermarkets Company or Compañía Dominicana de Hipermercados ***Carrefour***, and ***Olé Hypermarkets*****.** **Los Iberia** and **Zaglul** are important regional chains serving the eastern Dominican Republic. Of all these groups, Grupo Ramos is believed to be the largest employer and tax payer in the food retail sector.

The second component of the modern food retail channel is made up of the independent super markets. They can be found in major cities, especially Santo Domingo and Santiago which are the two largest cities in the country. They include forty (40) points of sale. Most of these independent super markets 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; 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 members attend international commercial fairs in order to help members scout new products and suppliers.

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 foods and beverages. There are no regional or national chains in this subsegment, and there is no development of the convenience store segment apart from these outlets.

The Traditional Retail Channel

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

In the Dominican Republic 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 developed from offering an average of 300 products to over 1500 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 service. 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 fifty thousand *colmados* around the country, and 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*.

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, low levels of concentration and there is very little information available regarding their operations and sales.

These walk-in warehouses sell with a relatively large margin (estimated at up to 18%) and the top 20 *almacenes* represent up to 70% of the total sales volume of manufacturers or importers that supply them. Some of these wholesalers have larger purchasing volumes than retailers in the modern segment. The principal players in this segment are: Hermanos Jerez, Casa Evelyn, Marte y Reyes, Hermanos Guzmán, Chavón, Casa Madeline, Pérez Mata, Eufemio Vargas, Grupo Nacional de Distribution, Catelly, Kardisa, Hermanos Leroux, Max Distribución, Samuel Abréu, Hermanos García, and others.

Company Profiles
As previously noted, there are eight main supermarket chains in the DR. Here is a short description of each of these.

PriceSmart: This is a well-known Club/ Warehouse Outlet, with two big stores in the Santo Domingo area, and one in Santiago. PriceSmart rents space in their stores to other businesses which provide additional services to its customers such as banking, utility payments, ETC.

Carrefour: This is an in international franchise (France) with its regional headquarters in Martinique. It has only one store in the DR with no plans to expand in the near future. Though it mainly caters to higher income customers, its strategic location in one of the most important highways of the country, the *Autopista Duarte*, allows it to attract many customers from lower income levels. Carrefour handles between 45 and 50 thousand different products. It has its own private label brand; however, it is open to handling both local and foreign brands. Carrefour has expressed interest in U.S. Dairy products like yogurts and cheese, as well as U.S. wine, whiskey, juices, turkey, meat, frozen & fresh products, fruits & vegetables, sugar -ice cream- cones among others.

Centro Cuesta Nacional (CCN): One of the biggest supermarket chains, CCN has a total of 34 stores in different formats. The largest format is Jumbo Hypermercados. There are 7 of them. The medium size format is known as “Nacional” supermarket. There are 13 of them. The smallest format is the Jumbo Express, of which there are 6. The remaining stores are known the Panera bakeries. CCN is a major importer of U.S. meat, dairy, and fruits and vegetables. They rely heavily on the Food Club, Value Time and Full Circle brands. Additionally they have a locally produces private label marketed under the *Líder* brand.

Grupo Ramos: One of the biggest chains with a total of 42 stores in different formats around the country. The largest format is known as “La Sirena.” There are 24 of these. The medium format is known as “Pola” supermarket. There are 7 of these. Finally, the convenience stores known as “A Prezio,” with 11 outlets. This chain caters more to the medium and lower income levels. Grupo Ramos also has its own brand, First Class, as well as two exclusive brands, Shurfine and Shurfresh.

Supermercados Bravo: This Company owns 6 supermarkets, 5 in Santo Domingo, and one in Santiago. These stores cater more towards the middle income sector of the population. This company imports U.S. cold sausages, cured meats, frozen and special products, and has expressed interest in California wines. This company also buys fruits and vegetables from Chile and Europe. Supermercados Bravo has started an in-house cheese factory named “Mu” using a new customer experience model called “see it while we make it”.

Mercatodo: This is another important company which owns the Supermercados La Cadena with a total of 10 stores. Mercatodo maintains a very active communication with the Office of Agricultural Affairs for help with business contacts. This company is mainly interested in importing poultry, shrimp, rice, and beans. Mercatodo does not yet have a private label brand.

Plaza Lama: This is a large chain with 12 stores catering to the middle income segment of the population. Plaza Lama regularly imports directly from the US, or buys from major brokers. It participates frequently in US food shows in order to increase their business contacts. Gold Select, Hytop and Better Value are their major brand suppliers.

Hipermercados Olé: This Company has 13 stores of which 5 are supermarkets and 8 are hypermarkets. These stores are located in some of the larger cities around the country.

Iberia and Zaglul, are important names in the Eastern region of the country as well.

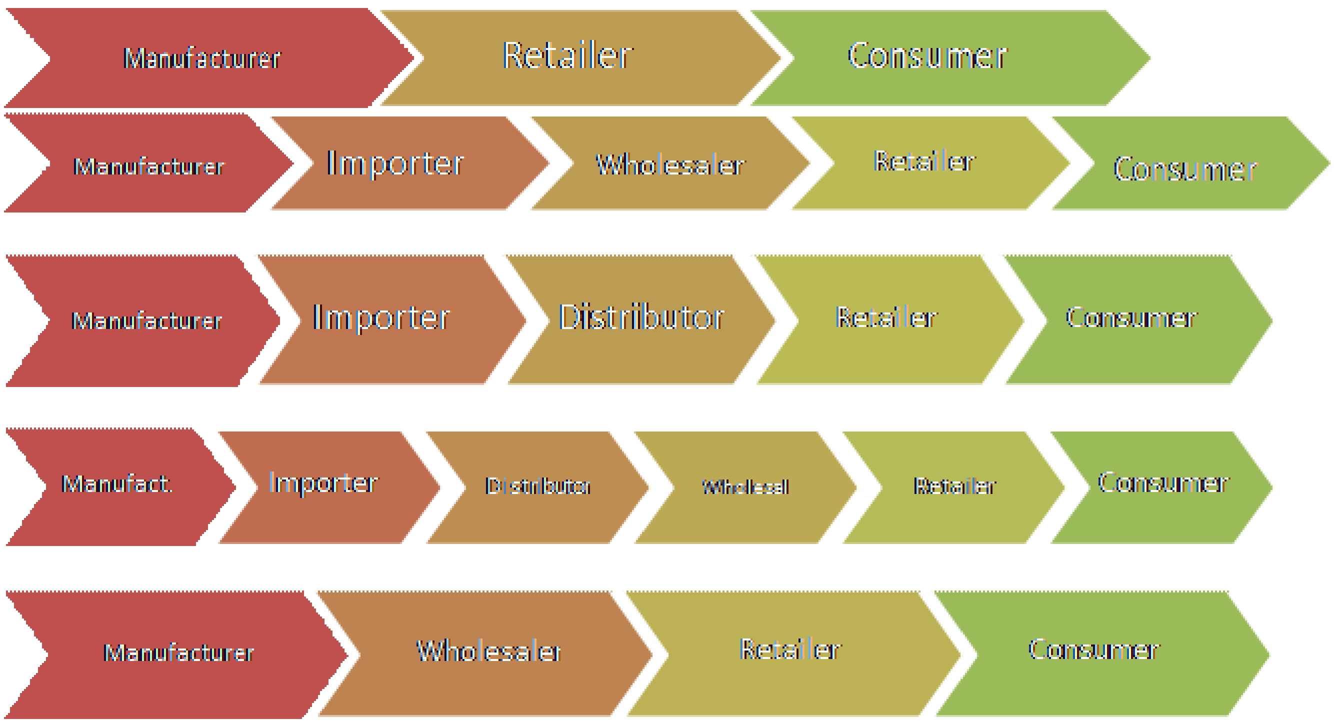
NUMBER OF SUPERMARKETS X SIZE & OWNERSHIP (Qty of Point of Sales) Sep-14			
	POS Large	POS Med	POS Small
GRUPO RAMOS	24	6	9
GRUPO CCN	20	0	7
PLAZA LAMA	7	3	0
BRAVO (GRUPO BEMOSA)	6	0	0
HIPERMERCADOS OLE	1	7	5
PRICESMART	3	0	0
LA CADENA (MERCATODO)	0	9	0
CARREFOUR (CIA DOM HIPERMERCADOS)	1	0	0
SUPERMERCADOS IBERIA	2	3	0
SUPERMERCADOS ZAGLUL	0	5	0

Source: Clos Consultores

1. ***Entry Strategy***

KEY FACTORS for successful entry

Given the diversity and the rapid pace of change within the Dominican retail sector—as well as the broad mix of domestically produced and imported products in the market place-- there are a wide variety of avenues for product entry. With several of the large [modern] retail chains active in directly sourcing products, in cases product entry involves few intermediaries. However, given the prevalence of low purchase volumes, 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 might include:



Marketing consultants recommend some key considerations to help U.S. suppliers who are interested in entering the Dominican market.

<u>For exporters interested in product placement in the modern food retail channel (supermarkets):</u>

- Define the real size of the market.
- Identify competitors, strengths and weaknesses.
- 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% of anticipated sales.
- Consider an estimate of between 10% - 15% as percentage margin of profit 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. Here is a list of the most common requirements from the Supermarket chains for new product placements in their establishments:
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%).
7. Fixed discount for visibility of brand (may be as high as 20%).
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
10. 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 ally in distribution and sales activities. Even so, don't expect to be able to reach all *colmados*.
- Diversify your sales, taking into consideration the 20 main warehouses in the country, each of which has strong influence over their clients thanks 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.
- Protect yourself from losses due to theft, improper use of promotions, returns, sponsorships, or other promotional activities.

Note: With any of the requirements above, responsibility for supporting any/all of those activities should be clearly outlined in the contract with your intermediary/importer. Frequently, the producer assumes responsibility for: samples; marketing plan; promotions and exhibitions, while the intermediary assumes responsibility for sales; trade marketing; and handling of low stock levels (out-of-date and losses).

ADVANTAGES AND CHALLENGES

Advantages	Challenges
1. The implementation of CAFTA-DR has increased the U.S. market share for food products, lowering or eliminating duties on nearly 80 percent of their products. These duty preferences have made U.S. products more competitive.	1. Competition from other CAFTA-DR signees, which are also increasing their share in the market due to the duty preferences.
1. A large and growing tourist sector (5 million in 2012 with a goal of 10 million visitors yearly for 2022) which demands high value food products.	1. Tariff rate quotas, safeguards and other CAFTA-DR provisions continue to protect local producers of rice, meat (beef, poultry and pork), dairy products, beans, garlic and onion.
1. Growing number of consumers demanding higher quality and healthier products; generally they perceive that the U.S. products meet their requirements.	1. The local Dominican food industry has become more efficient and more competitive, integrating new technologies into its production processes.
1. Efficient food distribution channels with the construction of new highways (Autovia del Este, Autopista del Coral and Circunvalacion Norte) modernization of ports and airports infrastructure, which facilitates the flow of imported food products.	1. Sanitary and phytosanitary issues continue to limit U.S. exports.
1. In general, the Dominican consumer is greatly influenced by the U.S. culture, therefore has a positive perception of U.S. products.	1. Even though most of the time it's not enforced in local supermarkets and retailers, the Dominican government requires Spanish labeling on al pre-packaged food products.
1. The proximity of DR to the United States and strong bilateral relationships throughout the public and private sectors facilitates trade.	1. Fiscal reform with recent increases in the Value Added Tax (ITBS in Spanish) from 16 to 18%, which will also include products such as coffee, sugar, chocolate, yogurt, oils, butter, and others; will affect the purchasing power of the Dominican consumer.
1. Population in urban centers and the rate of employment is growing.	1. Lack of transparency and corruption continue to earn the DR relatively low scores in international comparison tables (DR was 113th out of 185 countries in the World Bank's "Ease of Doing Business").
1. Dominican diaspora in the U.S. of	1. There is a lack of institutional continuity

approximately one million persons, clustered primarily in the northeastern states and Florida, whose remittance payments help support the home-country economy.	across changes in government administrations. The wholesale turnover in government personnel that typically occurs with changes in administrations can result in loss of records, which in turn can result in payment disputes and rejection of bills for goods and services purchased by preceding administrations.

SECTION III. COMPETITION

In calendar year (CY) 2014 the Dominican Republic imported a total of US$2.5 billion in food and beverages. The main imported products were: cereals (17%), prepared cereals and flour (10%) and animal and vegetable oils (10%). Of this total, 55 percent of the imports-- valued at $1.3 billion-- came from the United States. This represents a 40% increase in U.S. exports since 2007 when the CAFTA-DR agreement went into effect. Principal US agricultural exports to the Dominican Republic during 2014 included: soybean meal (US$192.3 million), wheat (US$149.7 million), corn (US$136.2 million), soybean oil (US$123.8 million) and dairy products (US$87.0)

US Commodities exported to the DR	January -December / Value					
	2009	2010	2011	2012	2013	2014
Consumer Oriented Total MT	228,451	284,091	310,977	391,071	489,084	485,619
Dairy Products	37,202	52,403	65,268	71,909	87,343	87,048
Beef & Beef Products	16,791	22,523	28,789	32,595	33,982	55,508
Prepared Food	24,914	29,725	36,643	42,454	66,881	55,351
Pork & Pork Products	34,030	37,895	33,158	36,042	43,402	47,076
Poultry Meat & Prods. (ex. eggs)	31,122	35,295	40,141	42,374	46,103	46,183
Breakfast Cereals	3,794	3,797	5,454	30,765	63,195	39,445
Fresh Fruit	17,349	22,387	22,372	27,539	23,852	30,608
Snack Foods NESOI	8,288	10,999	12,604	25,608	34,770	23,688
Fruit & Vegetable Juices	6,508	9,341	5,297	10,812	14,353	16,070
Processed Vegetables	8,552	11,322	10,291	9,729	9,693	15,383
Wine & Beer	3,360	4,366	6,124	7,056	12,342	13,678
Condiments & Sauces	7,517	8,305	9,462	11,499	9,989	12,393
Chocolate & Cocoa Products	6,745	7,048	7,980	8,696	8,244	9,805
Processed Fruit	4,317	3,839	5,038	6,588	6,559	6,414
Tree Nuts	4,400	6,162	5,236	5,786	4,092	5,944
Non-Alcoholic Bev. (ex. juices)	1,553	1,701	3,054	4,137	3,849	4,621
Fresh Vegetables	1,575	3,274	3,398	4,566	3,958	4,569
Other Consumer Oriented	2,275	2,084	3,082	2,927	2,913	3,990
Dog & Cat Food	2,827	2,616	3,368	3,496	3,516	3,450
Meat Products NESOI	1,483	2,549	2,903	2,062	2,815	2,523

Eggs & Products	3,849	6,461	1,315	4,434	7,233	1,870

Source: US Census Data

Other important suppliers to the DR in 2014 were: Mexico ($94 million), Brazil ($94 million), Argentina ($80 million), Denmark ($73 million), Spain ($63 million) and Costa Rica ($63 million). Mexico exported mainly prepared cereals and flour valued at $36 million. Brazil exported mainly corn (valued at $62 million). Denmark exported dairy products, mainly powdered milk ($46 million). Costa Rican exports depended heavily on food preparations (valued at $29 million).

The major food expenses for Dominican consumers were meat (23%); bread and cereals (22%); vegetables (14%); and fruits (10%). In the case of non-alcoholic beverages, the major items were mineral water, refreshments, and fruit and legume juices (89%). Post does not anticipate that spending patterns will change significantly in the near future. There is a growing demand for consumer-oriented products which presents opportunities for U.S exporters.

SECTION IV. BEST PRODUCT PROSPECTS

In their latest report, Food Export USA identified the following products as those with the greatest trade potential in the DR: trimmings (Beef, Pork, and Turkey), yogurt, processed cheese, ice cream, tree nuts, fresh fruits, raisins, frozen potatoes, chocolate, mixes and doughs, and salmon. Low carbohydrate and light foods are also growing in sales. Additional prospects include:

Product category	Imports in 2014 ($1,000,000)	U.S. Imports ($1,000,000)		5-Yr. Avg. annual U.S. import growth	Import tariff rate	Key constraints over market development	Market attractiveness for U.S.
		2013	2014				
Milk And Cream, Concentrated, <1.5% FAT (0402100000)	36.1	23.9	31.7	25%	56%	Still subject to TRQ's and a high import tariff rate.	Increasing demand of dairy products,. DR consumer associates U.S. dairy with high quality.
Wine (2204214000)	29.6	8.5	8.8	50%	0%	Competition with Chilean and Spanish wines.	Increasing segments of the market are expending more money in alcoholic beverages.
Baby food (21069099)	85.0	6.2	7.3	18%	2%	None.	Increase of the number of births in the upper middle and upper classes, who tends to consume U.S. products as they associate them with

							high quality.
Cheese, including mixtures nesoi (0406909550)	27.3	3.8	6.6	13%	0%	High competition from the local market. Spanish label requirement	Increasing demand of dairy products, especially cheese. DR consumer associates U.S. cheese with high quality milk.
Potato fries frozen (2004108020)	16.3	2.3	3.8	28%	0%	Competition from other countries such as Canada, Holland and Belgium.	Increasing opportunities in retail and food sector; with the increase of local and international brands of fast food and restaurants.
Apple juice (2009790000)	5.0	3.4	4.5	55%	0%	Competition from local and imported flavored juices less expensive.	Increasing demand of the product from the middle class on, who prefers quality and flavor to a smaller price.
Beer, malt (2203000000)	8.0	3.3	3.5	21%	6.67%	Strong competition from the local industry.	The Dominican consumer is expanding his taste to foreign beers.

SECTION V. POST CONTACT AND FURTHER INFORMATION

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Please do not hesitate in 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

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