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Dominican Republic

HRI Food Service Sector

Report

2003

Approved by:

David G. Salmon

U.S. Embassy, Santo Domingo

Prepared by:

Wagner A. Mendez

Report Highlights:

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

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

HOTEL, RESTAURANT, INSTITUTIONAL (HRI) FOOD SERVICE SECTOR REPORT

I. MARKET SUMMARY

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

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

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

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

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

Some of the macro-economic factors which affect the food service market are:

- Economic Growth -- The Dominican economy grew at over 7 percent during the last half of the 90's and a slower but respectable 2.5 percent the past two year. Tourism has been one of the most influential factors on this growth. It accounts for over 7 percent of the total GDP and it has grown at an average rate of 5.4 percent from 1998 to 2002
- Growth in the number of women in the workforce -- Over 40 percent of women are in the labor force. This results in higher demand for food outside the home.
- The increase in per capita income in the country.
- Vacations -- Dominicans are taking more vacations in country. This implies an increase in food consumption in the HRI sector.
- Menu Diversification. - Dominicans are internationalizing their consumption habits. There is an increase in the consumption of pizzas, hamburgers and other types of fast food. In addition, most restaurants offer dishes with imported meats, fish, and other sea foods.
- Tourism Promotion -- The Ministry of Tourism is investing a lot of resources to promote the country overseas and all inclusive resorts are having promotional campaigns for Dominican to take vacations locally.

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

Advantages	Challenges
<ul style="list-style-type: none"> ➤ The growth of tourism in the country, implies a greater demand for imported products, which are perceived as high-quality products. ➤ American culture has a great influence on the Dominican Republic. This has been conveyed through the bilateral relations over several years, the large number of Dominicans living in the United States, and the influence of mass media such as cable TV. ➤ Fast food chains and other types of restaurants from the U.S. are very popular in the country. ➤ U.S. suppliers can supply products with consistent and reliable quality and quantity. ➤ The number of North American tourists visiting the country has been growing over the years and this trend is expected to continue as trade relations increase between both countries. 	<ul style="list-style-type: none"> ➤ The local Dominican food industry is becoming more efficient and more competitive, as it integrates new technology and machinery into its production processes. ➤ Globalization and the influence of the mass media have given Dominicans access to other cultures, e.g., Europe, Asia, and South America. These different cultures influence consumption habits here and the demand for foods from those countries. ➤ The prices of products offered in fast food restaurants of U.S. origin are higher in the Dominican Republic than in the United States ➤ In the Dominican Republic, there are significant tariff and non-tariff barriers for food imports. ➤ The Dominican Republic just signed a free trade agreement with the other Caribbean countries, which will increase trade within this area, possibly at the expense of U.S. exports.

II ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

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

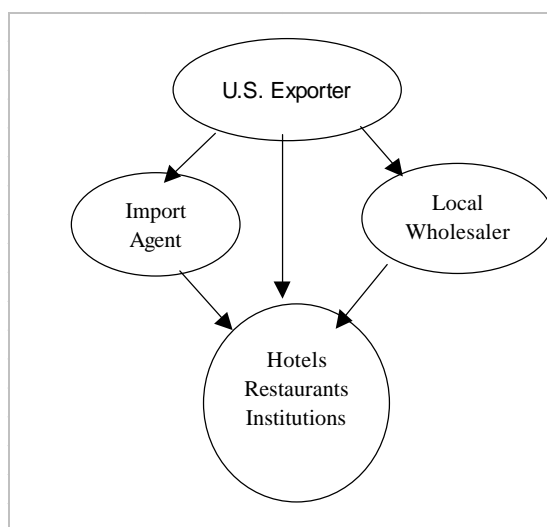
Due to the growth of tourism in the Dominican Republic, the number of businesses specialized in importing food and drinks has increased. These businesses supply most of the hotels and restaurants in the country.

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

B. MARKET STRUCTURE

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

Fig. 1. Road Map for Market Entry



The major changes in food demand experienced by hotels and resorts over the last five years are:

- 80 percent of hotels in the country are resort-style, which are all-inclusive. Offering a relatively low all-inclusive price leads hotels to try to reduce the costs of the food they offer. However, some suppliers say that the insistence on high-quality products remains unchanged.
- Tour operators have put restrictions on hotels regarding the quality of the foods they offer to the point of wielding influence over the type of supplier used. Tour operators have required that firms be contracted to certify suppliers' quality control practices in order to guarantee the quality of products used in hotels.
- Local competition has increased substantially due to increases in product quality. It is estimated that 70 percent of food is produced locally.
- There is a trend towards using semi-processed products in order to reduce costs.

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

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

C. SUB-SECTOR PROFILES

1. Hotels and Resorts

COMPANY PROFILES

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

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

2. Restaurants

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

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

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

FAST FOOD RESTAURANT PROFILES

Name of Restaurant	Type	Locations	Number of Outlets	Purchasing Agent
Burger King	Fast Food	Santo Domingo, Santiago, San Francisco	20	Direct
McDonalds	Fast Food	Santo Domingo, Santiago	10	Direct
Wendy's	Fast Food	Santo Domingo	3	Direct
Kentucky Fried Chicken	Fast Food, Internet Sales	Santo Domingo	4	Direct
Domino's Pizza	Fast Food	Santo Domingo, Santiago	6	Direct
Pizza Hut	Fast Food, Internet Sales	Santo Domingo, Santiago	6	Direct
Taco Bell	Fast Food	Santo Domingo, Santiago	3	Direct

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

3. Institutions

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

III. COMPETITION

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

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

IV. BEST PRODUCTS PROSPECTS

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

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

PRODUCT	AVERAGE GROWTH % (CY 1997-2001)
1. Red Meats Fresh/Chilled/Frozen	108
2. Wine and Beer	55
3. Nursery Products and Cut Flowers	46
4. Red Meat-Prepared/Preserved	38
5. Pet Food	25
6. Fresh Fruit	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

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

V. KEY CONTACTS AND FURTHER INFORMATION

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

U.S. Mailing Address:

**OFFICE OF AGRICULTURAL AFFAIRS
U.S. EMBASSY-SANTO DOMINGO**

Unit 5530
APO AA 34041

Phone: (809) 227-0112
Fax: (809) 732-9454
E-mail: AgSantoDomingo@fas.usda.gov
Home page: <http://www.usemb.gov.do/fas.htm>

Local Address:

**OFFICE OF AGRICULTURAL AFFAIRS
U.S. EMBASSY-SANTO DOMINGO**

Avenida Pedro Henriquez Ureña, #133
La Esperilla
Santo Domingo, Dominican Republic

NATIONAL ASSOCIATION OF HOTELS AND RESTAURANTS (ASONAHORES)

Ramón Prieto, President
Calle Presidente González, Esquina Avenida Tiradentes
Edificio Cumbre, 8th Floor, Plaza Naco
Santo Domingo, D. R.
Tel: (809) 540-4676
Fax: (809) 687-4727
E-mail: asonahores@codetel.net.do
Contact: Ramón Rodríguez, Executive Director

APPENDIX I

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

I. BUSINESS HOTELS**A. SANTO DOMINGO****MELIA SANTO DOMINGO HOTEL & CASINO**

Antonio De La Calle, General Manager
Clarissa Ramírez, F&B
Avenida George Washington #365
Santo Domingo, D.R.
Tel: (809) 221-6666
Fax: (809) 686-0125/687-8150 (Reserv.)
E-mail: meliasd@codetel.net.do

HOTEL SANTO DOMINGO

Kurt Tschamper, General Manager
Gissel Derory, F&B Director
Avenida Independencia, Esq. A. Lincoln
Santo Domingo, D.R.
Tel: (809) 221-1511
Fax: (809) 535-4050, 533-7455
E-mail: sales@hotel.stodgo.com.do

BARCELO GRAN HOTEL LINA

Bartolomé Más, General Manager
Rosario Sangiovanni, F&B Manager
Avenida Máximo Gómez
Santo Domingo, D.R.
Tel: (809) 563-5000
Fax: (809) 686-5506/686-5521/686-5797
E-mail: h.lina@codetel.net.do

HOTEL DOMINICAN FIESTA

José Bonet, General Manager
Jaime Then, F&B Manager
Avenida Anacaona #1974
Los Caciczagos
Santo Domingo, D.R.
Tel: (809) 562-8222
Fax: (809) 482-8938
E-mail: salesdominican@codetel.net.do

RENAISSANCE JARAGUA HOTEL & CASINO

Roberto Grisi, General Manager
Alejandro Vidal, F&B Manager
Avenida George Washington #367
Santo Domingo, D.R.
Tel: (809) 221-2222
Fax: (809) 686-0528
(Reservations: 809-221-8271)
E-mail: hjaragua@codetel.net.do

**HOTEL V CENTENARIO
INTERCONTINENTAL**

José Manuel Lovaton, General Manager
Juan Piñero, F&B Manager
Avenida George Washington, No. 218
Santo Domingo, D.R.
Tel: (809) 221-0000
Fax: (809) 221-2020/686-2580
E-mail: santodomingo@interconti.com

HOTEL PLAZA NACO

Johnny Bernal, President
José Manuel Corlletto, F&B Manager
Calle Presidente González,
Esquina Avenida Tiradentes
Ensanche Naco
Santo Domingo, D.R.
Tel: (809) 541-6226/544-4112
Fax: (809) 541-7251
E-mail: hoplaza@internet.codetel.net.do

HOTEL & CASINO NACO

Manuel Pimentel, Owner
José M. Soto, General Manager
Avenida Tiradentes No. 22, Ensanche Naco
Santo Domingo, D.R.
Tel: (809) 562-3100
Fax: (809) 544-0957
E-mail: hnaco@tricom.net

OCCIDENTAL EL EMBAJADOR

Belén Gómez, General Manager
John Auzmendi, F&BM Manager
Evelyn Carballo Banquette
Avenida Sarasota # 65
Bella Vista
Santo Domingo, D.R.
Tel.: (809) 221-2131
Fax: (809) 532-5306

B. SANTIAGO DE LOS CABALLEROS

HOTEL EL GRAN ALMIRANTE (HODELPA)

Vicente del Rosario, General Manager
Dimas Hoeperman, F&BM Manager
Avenida Estrella Sadhalá
Santiago, D.R.
Tel. (809) 580-1992
Fax: (809) 241-1492
E-mail: almirante@codetel.net.do

HOTEL CENTRO PLAZA (HODELPA)

Vicente del Rosario, General Manager
Calle Mella # 54, Esquina El Sol
Santiago, D.R.
Tel. (809) 581-7000
Fax: (809) 582-4566
E-mail: h.centroplaza@codetel.net.do

HOTEL CAMP DAVID

José Manuel Bermúdez, President
Carretera Luperón, Km. 7
Gurabo
Santiago, D.R.
Tel. (809) 223-0666
Fax: (809) 971-3167/736-7165

II ALL INCLUSIVE RESORTS

1. EASTERN REGION

BARCELO CAPELLA BEACH RESORT

César Guillamo, F&BM Manager
Fernando Gómez, General Manager
Villas del Mar
P.O. Box 4750
Juan Dolio, D.R.
Tel.: (809) 526-1080/221-0546
Fax: (809) 526-1088, 526-3608/221-0483
E-mail: capella.dh@barcelohotels.com.do

PUNTA CANA BEACH RESORT

Frank Rainieri, President
Antonio Ranis, General Manager
Punta Cana, D.R.
Tel. (809) 686-0084/221-2262
Fax: (809) 686-0165/688-1923(Sto. Dgo.)
E-mail: puntacanabr@codetel.net.do

BARCELO BAVARO BEACH RESORT HOTEL GOLF & CASINO

(Hotel Bavaro Palace, Hotel Beach, Villas Bávaro, Hotel Garden)
Jorge Villanovas, General Director
Tomeu Salva, General Manager
Francisco Méndez, Purchasing Manager
Higüey, D.R.
Tel. (809) 686-5797
Fax: (809) 686-5859

OCCIDENTAL ALLEGRO RESORTS PUNTA CANA

Rafael Alberto Smith, General Manager
José Adolfo Sid, F&B Manager
Punta Cana, Cabeza de Toro, D. R.
Tel. (809) 687-5747
Fax: (809) 685-0139
E-mail: asmith@cdbavaro.allegroresorts.com

CASA DE CAMPO

Marcos Soto, Acting General Manager
Stefano Silvestri, F&B Manager
La Romana, D.R.
Tel: (809) 523-3333
Fax: (809) 523-8548

METRO HOTEL & MARINA

Dennis Montero, General Manager
Frank Bautista, F&B Manager
Avenida Boulevard
Juan Dolio, D.R.
Tel: (809) 526-2811/221-0427
Fax: (809) 526-1808/526-1307
E-mail: metro.hotel@codetel.net.do

PARADISUS PUNTA CANA

Francisco Castillo, General Manager
Jean Pierre Jauberd, F&B Director
Playa de Bávaro, Higüey, D.R.
Tel: (809) 687-9923
Fax: (809) 687-0752
E-mail: paradisus3@codetel.net.do

CLUB MED

Elda Rojas, General Manager
Punta Cana, D.R.
Tel: (809) 567-5228/686-5500
Fax: (809) 685-5287/565-2558 (Direct)

**BAVARO PRINCESS ALL SUITES
RESORTS**

Jordy Pelfort, General Manager
Juan Segarra, F&B Manager
Higüey, D.R.
Tel. (809) 221-2311/567-4090
Fax: (809) 686-5427
E-mail: bavaroprincess@codetel.net.do

IBEROESTAR

Daniel Díaz Trujillo, General Manager
Punta Cana, D.R.
Tel: (809) 221-6500/547-2343
Fax: (809) 688-6186
E-mail: ja.granja@iberostar.com.do

**CLUB VIVA DOMINICUS AND CLUB
VIVA DOMINICUS PALACE**

Marcelo Cutri, General Manager
Laurent del Fresno, F&B Manager
La Romana, Bayahibe, D.R.
Tel: (809) 686-8720/5658
Fax: (809) 687-8583/221-6805

HOTEL CORAL HAMACA

Manuel Castro, General Manager
William Polanco, F&B Manager
Boca Chica, D.R.
Tel: (809) 523-4611
Fax: (809) 523-5146/ 5176
E-mail: chgerencia@internet.codetel.net.do

**BARCELO REINA CUMAYASA
RESORT**

Javier Migueis, General Manager and F&B
Carretera Romana-S.P.M., Km 12
Tel: (809) 686-6444/550-7506
Fax: (809) 550-8105
Web page: <http://www.cumayasa.com>

HOTEL SANTANA BEACH

Gonzalo Fenández Corrales
Carretera San Pedro de Macoris - La Romana
Playa Santana Beach Resort
La Romana, D. R.
Tel: (809)412-1010, 4125342
Fax: (809) 412-1818
E-mail: h.santana@mail.cotursa-hotels.com

HOTETUR DOMINICAN BAY

Carlos Rubio, General Manager
Calle Juan Bautista Vicini,
Esquina 20 de Diciembre
Boca Chica, Santo Domingo, DR
Tel:(809) 412-2001
Fax: (809) 412-0687/523-6310

2. NORTHERN REGION

OCCIDENTAL GRAN HOTEL PLAYA DORADA

José María Spart, General Manager
Jesús García, F&B Manager
Playa Dorada
Puerto Plata, D. R.
Tel: (809) 320-3988/4447
Fax: (809) 320-1190
E-mail: ohrd.phd@codetel.net.do

JACK TAR VILLAGE

Freddy Cabrera, General Manager
Leonardo Méndez, F&B Manager
Playa Dorada
Puerto Plata, D. R.
Tel: (809) 320-3800
Fax: (809) 320-4161/2554
E-mail:
Jacktarvillagewww@allegroresorts.com

BARCELO PUNTA GOLETA

Luis E. Noboa Fernández, Executive V.P.
Cabarete
Puerto Plata, D. R.
Tel. (809) 571-0700/580-0079/581-4222
Fax: (809) 571-0707
E-mail: barcelo.p.gta@codetel.net.do

CASA MARINA BEACH CLUB

Oscar Peña, Cooperate Director
Nieves Sobrino, Corporate Purchasing
Manager (Ext. 316)
Calle Los Pinos #7
Ensanche La Julia
Santo Domingo, DR
Tel. (809) 562-7475, Ext. 303
Fax. (809) 566-2354

PUERTO PLATA VILLAGE & SPA

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

OCCIDENTAL FLAMENCO BEACH RESORT

Ventura Serra, Cooperate Manager
(Occidental El Embajador)
Ricardo Argiles, General Manager
Pascual Ventura, F&B Manager
Playa Dorada, Puerto Plata
Tel. (809) 320-5084
Fax: (809) 320-6319
E-mail: ohrdsales.pop@codetel.net.do

HOTEL YAROA

Edo Dewith, General Manager
El Batey
Sosúa, D R.
Tel: (809) 571-2651
Fax: (809) 571-3814
E-mail: infoethotel@arroba.com

HOTEL GRAN BAHIA

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

III. RESTAURANTS**A. SANTO DOMINGO****LA BRICIOLA**

Sabrina Colombo, General Manager

Franco Riccobono, Owner

Calle Arzobispo Meriño #152

Zona Colonial

Santo Domingo, D.R.

Tel: (809) 688-5055

Fax: (809) 688-6038

E-mail: labriciola.com.do@codetel.net.do

REINA DE ESPAÑA

Catalina Henríquez, Owner/Manger

Calle Cervantes #103, Gazcue

Santo Domingo, D.R.

Tel: (809) 685-2588/687-5029

Fax: (809) 689-8461

RESTAURANT VESUVIO

Vincenzo (Enzo) Bonarelli, Owner

Avenida George Washington # 521

Santo Domingo, D.R.

Tel: (809) 221-1954

Fax: (809) 221-3300

E-mail: vesuvio@restaurantvesuvio.com

RESTAURANT VESUVIO II

Gaetano Bonarelli, Owner

Giancarlo Bonarelli, General Manager

Avenida Tiradente #17, Ensanche Naco

Santo Domingo, D.R.

Tel: (809) 562-6060

Fax: (809) 541-1104

RESTAURANT JUAN CARLOS

María Lidía Hurtado Gil, Owner/Manager

Avenida Gustavo Mejía Ricart #7

Santo Domingo, D.R.

Tel: (809) 562-6444

Fax: (809) 562-6444

RESTAURANT DON PEPE

José María Díaz, Owner

Avenida Pasteur #41,

Esquina Calle Santiago

Gazcue

Santo Domingo, D.R.

Tel: (809) 686-8481/689-7612

Fax: (809) 685-7984

RESTAURANT PALACIO DE JADE

Johnson Ng, Owner

Leonida Montilla, Manager

Calle José María Heredia #6

Gazcue

Santo Domingo, D.R.

Tel: (809) 686-3226

Fax: (809) 699-9562

STEAKHOUSE CAFÉ

Eduardo Alvarez, General Manager

Avenida Gustavo Mejía Ricart #52

Ensanche Naco

Santo Domingo, D.R.

Tel: (809) 565-1039/7137

Fax: (809) 476-0226

E-mail: steakh@tricom.net,
e_alvarezf@hotmail.com

FELLINI RISTORANTE & BAR

Lucas Piraccini, Owner

Calle Roberto Pastoriza #504

Santo Domingo, D.R.

Tel: (809) 540-5330

Fax: (809) 541-4924

E-mail: fellini@codetel.net.do

SCHEREZADE RESTAURANT

Juan Scheker, Rafael Scheker and

Elizabeth Scheker, Owners

Avenida Roberto Pastoriza # 226,

Ensanche Naco

Santo Domingo, D.R.

Tel: (809) 227-2323

Fax: (809) 540-3030

TABOO BAMBU

Avenida Roberto Pastoriza #313
Enrique Peinado, Owner/Manager
Tel: (809)227-2727/3443
Fax: (809) 227-3555

EL MESON DE LA CAVA

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

RESTAURANT DAVID CROCKET

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

TOSCANA

Alfredo Alonso, Owner
Calle Erick Leonard Ekman #34
Arroyo Hondo
Santo Domingo, D.R.
Tel: (809) 549-5191
Fax: (809) 540-0761
E-mail: a.alonso@codetel.net.do

NEPTUNO'S (BOCA CHICA)

Claus Reprich, Owner
Autopista Duarte #20, Boca Chica
Tel: (809) 523-4703/6534/4279
Fax: (809) 523-4251
E-mail: neptunos@codetel.net.do

RESTAURANT SPAGHETTISIMO

Frederick Gollon, Owner
Paseo de los Locutores #13
Santo Domingo, D.R.
Tel: (809) 565-3708/547-2650
Fax: (809) 549-6443

RESTAURANT LA ATARAZANA

Ramon Santiago, President
Calle La Atarazana # 5, Zona Colonial
Santo Domingo, DR
Tel. (809) 687-6287
Fax.(809)686-0855

RESTAURANT EL BUCANERO

Marino Díaz, President
Avenida España, Puerto Sans Souci
Santo Domingo, DR
Tel. (809)592-2202
Fax.(809)592-2305

SEASON'S RESTAURANT

Roberto Sanson, Owner
Angela Bertha Medina, General Manager
Avenida Roberto Pastoriza No. 14, Ensanche
Naco
Santo Domingo, D.R.
Tel: (809) 412-2655/565-2616
Fax: (809) 547-3005

RANCHO STEAK HOUSE

Nadua Hazim, General Manager
Julio Hazim, Owner
Plaza Lope de Vega, Local B13, 2do. Nivel
Santo Domingo, DR
Tel. (809)565-1578, (809)566-1380
Fax. (809)565-1514

RESTAURANT SULLY

Carlos Fermin, President
Avenida Charles Summer #19, Los Prados
Santo Domingo, DR
Tel. (809)562-3389
Fax. (809)566-6405

RESTAURANT EL PAPARAZZO

Heriberto Hernández, Owner
Avenida Roberto Pastoriza #315
Santo Domingo, DR
Tel. (809) 540-5000
Fax. (809)540-5007

B. SANTIAGO

RESTAURANT MAROMA

Modesto Aróstegui, Owner/Manager
Calle 15, 1-3
Jardines Metropolitanos
Santiago, RD.
Tel. (809) 724-4643, 724-4644
Fax. (809) 241-3060

RESTAURANT MESALUNA

Julio Idigoras, Owner/Manager
Calle Benito Juárez Esq. Calle 4, Villa Olga
Santiago, RD.
Tel. (809) 336-2641, 971-7104
Fax. (809) 580-1014

RESTAURANT EL PEZ DORADO

Jorge Ho, General Manager
Calle El Sol # 43
Santiago, DR
Tel. (809) 582-2518
Fax. (809) 971-6840

RESTAURANT EL PAPA RAZZO

Heriberto Hernández, Owner
Calle Mauricio Alvarez #6
Urbanización Los Colegios
Santiago, DR
Tel. (809) 587-6578
Fax. (809) 226-0161