



USDA Foreign Agricultural Service

# GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

**Date:** 11/14/2003

**GAIN Report Number:** DR3025

## Dominican Republic

### Retail Food Sector

### Report

**2003**

**Approved by:**

David G. Salmon

U.S. Embassy, Santo Domingo

**Prepared by:**

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**Report Highlights:**

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

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

## RETAIL FOOD SECTOR REPORT

### I. MARKET OVERVIEW

The Dominican Republic is the third largest market for U.S. agricultural products in the Western Hemisphere, behind Mexico and Canada with calendar 2002 imports of \$570 million. Most of the growth in U.S. exports to the region in recent years has been in consumer-oriented products, with exports to the Dominican Republic increasing from \$57 million in 1996 to \$103 million in 2002. However, imports of U.S. food and beverage products are off sharply in 2003, due to a domestic financial crisis, which resulted from the bankruptcy of the third largest bank in the country, Banco Intercontinental or Banniter, which collapsed amidst allegations of massive fraud. U.S. trade data through August 2003 show imports of consumer-oriented products from the United States off 27 percent overall, with declines in almost every product category.

Although, the Dominican Republic has seen the highest sustained economic growth in the hemisphere over the past five years, averaging 7.6 percent, reliable estimates are for GDP to be -3 for 2003. Likewise, inflation that was 10.5 percent in 2002 is expected to soar to 35 percent during 2003. The Dominican peso, which averaged 18.54 to the U.S. dollar during 2002, has lost half its value so far in 2003 and is now trading at around 35 pesos to the dollar. This economic contraction and loss in currency value has sharply reduced the purchasing power of Dominican consumers and has led to similar sharp drop in demand for imported food products, as reflected in U.S. export statistics in the first paragraph. Although the Dominican economy is felt to be fundamentally sound, the effects of this financial crisis are likely to continue well into 2004. Despite the negative prospects for the short term, the Dominican market for imported food and beverage products still remains large and diversified and will regain its vigor, as the country works its way through the current situation.

According to the latest National Survey on Income and Expenses carried out by the Dominican Central Bank, in 1998, the total demand for food and drinks was estimated at US\$3.1 billion. With an average growth rate of six percent per year, it is estimated that this figure reached US\$3.7 in year 2001. Approximately 75 percent of retail food products are sold through the traditional system of mom n' pop stores called *Colmados*, and about five percent is sold directly by wholesalers. Only the remaining 20 percent is sold through modern supermarkets. However, this is the market segment through which imported products reach the middle and upper classes, the target market of most U.S. exporters. It is estimated that about 45 percent of the all food and beverages consumed in the country are imported. About 53 percent of these imported products come from the United States. This ratio is expected to remain fairly stable both in terms of food imports and in U.S. participation.

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

Gas Marts have also been introduced in this country from 1999, but carry a rather small line of snacks and beverages. This sector expanded during the 990s, but growth in the number of outlets has now largely stopped, because of the current economic situation. In 2003, there were 70 Food Marts largely located in the two major cities in the country, Santo Domingo and Santiago.

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

<b>Advantages</b>	<b>Challenges</b>
<ol style="list-style-type: none"> <li>1. The number of supermarkets has grown nationwide, providing greater market penetration for most imported food products.</li> <li>2. The tourism sector is large and growing, increasing demand for high quality food products.</li> <li>3. Dominicans are greatly influenced by American culture and have a positive perception of U.S. products.</li> <li>4. The Dominican Custom Service uses the WTO-approved method of customs valuation, which requires that duties be applied to actual invoice prices of imported goods, rather than average or calculated price for imported goods.</li> </ol>	<ol style="list-style-type: none"> <li>1. The current economic crisis is reducing demand for imported food products.</li> <li>2. Local producers and processors are becoming more competitive in quality and price.</li> <li>3. Globalization has allowed other regions, such as Europe, South American and Asia, to expand sales into what has traditionally been a U.S. dominated market.</li> <li>4. Imports of some products, including milk, beans, rice, and poultry, are restricted by tariff rate quotas to protect local producers.</li> </ol>

## II. ROAD MAP FOR MARKET ENTRY

### A. SUPERMARKETS

#### Entry Strategy

The best way to enter the Dominican market is through a local importer/distributor. These importers/distributors are familiar with the market, business practices, and related laws and should be able to establish direct sales contacts with supermarkets. Supermarkets have also formed companies in order to import food and beverages and can also be contacted directly.

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

Supermarkets have a buying structure that depends on their size. The largest supermarkets have a purchasing department with several buyers, specialized by product line. Normally, supermarkets have no more than 3 to 5 brands of one type of product, and the selection of these brands is based on competitive advantage criteria for the business and for customers. The purchasing committee decides on the introduction of new products.

### Market Structure

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

**Table 1.a. PROFILE OF THE MAJOR SUPERMARKETS**

Name of Retailer	Ownership (local/foreign)	Number of Outlets	Location	Purchasing Agent
Supermercados Nacional	Dominican/Spain	10	Santo Domingo and Santiago	Direct importers and distributors
La Despensa	Dominican/Spain	6	Santo Domingo	Lower income focus for Supermercados Nacional
JUMBO	Dominican Spain	2	La Romana, Santo Domingo	Another Name/Concept for Supermercados Nacional
Supermercados Pola	Dominican/Spain	8	Santo Domingo and Santiago	Direct, importers and distributors
Supermercados La Cadena	Dominican/Spain	6	Santo Domingo	Direct importers and distributors
Supermercados Plaza Lama	Dominican/Spain	3	Santo Domingo	Direct importers and distributors
Supermercados Bravo	Dominican/Spain	3	Santo Domingo	Direct importers and distributors
PriceSmart Warehouse	US	2	Santo Domingo and Santiago	Direct importers and distributors
Carrefour	French	1	Santo Domingo	Direct importers and distributors
Hipermercados Ole	Dominican / Spain	5	Santo Domingo and San Cristobal	Direct importers and distributors

## B. CONVENIENCE STORES, GAS MARTS, KIOSKS

There is only one type of convenience stores existing in the Dominican Republic. These are located in gasoline stations. They are geared for the fast food public. They only offer snack foods and ready to go items.

### Market Entry

There is a limited amount of products that can be introduced in these stores. If you have fast food and snack items to market, these would be the place to introduce the products. Our recommendation would be to choose a good importer/distributor that would be able to make direct contact with these stores in order to establish an efficient distribution system.

### Market Structure

Most of the convenience stores located in gasoline stations are managed according to norms established by the gasoline company. They are relatively new and have only been established within the last four years. Texaco has 26 Food Marts and is now establishing a new franchise called Star Mart, which has 6 stores. Shell has 10 Select stores. Esso has the On the Run, Tiger Market (26), and 2 Mini Markets, which they are leasing out. They have expressed that they have no immediate plans for expansion because of the current economic situation in the country.

The gasoline companies have aimed to increase fuel sales by setting up these food marts, but they do not impact the Dominican public as they do in the United States. The reason for this is because there is a full service policy in this country and customers do not need to leave their vehicle when fueling.

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

**Table 1.b. PROFILE OF THE MAJOR CONVENIENCE STORES**

<b>Name of Retailer</b>	<b>Ownership (Local/ Foreign)</b>	<b>Number of Outlets 2003</b>	<b>Location</b>	<b>Purchasing Agent</b>
On the Run & Tiger Market	Dominican	26	Nationwide	Distributor
Food Mart	Dominican	26	Nationwide	Distributor
Star Mart	Franchise/ Dominican	6	Nationwide	Distributor
Select	Dominican	10	Santo Domingo	Distributor
Mini Mart	Dominican	2	Santo Domingo	Distributor

Source: Internal Research

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

#### Market Structure

There are approximately 52,000 small mom n' pop stores in the country, referred to locally as *colmados*). These are supplied by the over 1,600 food wholesalers nationwide, of which most are located in Santo Domingo and the Santiago area. *Colmados* have refrigeration systems for drinks (beers, juices and soft drinks), but only very few have storage for fruits and vegetable. Because the electrical supply in the country is very unstable, they do not handle perishable foods.

*Colmados* account for a large portion of national sales, but sell a very limited line of products, which include a large percentage of domestically produced products. They also tend to sell in very small quantities and at higher prices than the supermarkets. Middle and upper class consumers make most substantial purchases at supermarkets, in order to obtain better selections of products as well as lower price.

### III. COMPETITION

The percentage of Dominican imports of food products coming from the United States is estimated at 37 percent. European countries (Denmark, the Netherlands, Norway, and Spain) represent 27 percent, and Mexico and Costa Rica, 3 and 2 percent, respectively.

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

	COUNTRY	VALUE (US\$1,000)	PERCENTAGE
1	United States	154,051	37
2	Denmark	50,827	12
3	Netherlands	25,785	6
4	New Zealand	21,919	5
5	Norway	21,637	5
6	Spain	15,180	4
7	Canada	14,167	3
8	Colombia	13,996	3
9	Chile	12,123	3
10	Mexico	11,966	3
11	Venezuela	7,891	2
12	Costa Rica	6,678	2
13	Italy	4,479	1
14	France	4,046	1
15	Ireland	3,273	1
	Others countries	44,176	11
	Total Consumer -Oriented, Fish and Seafood Products	412,194	100

Source: UN Trade Database

In the past few years, imports from South America, Central America and the Caribbean have increased modestly. Two free trade agreements with Central America and Caribbean are being implemented.

#### IV. BEST PRODUCTS PROSPECTS

The following products are the ones, which have shown the highest average growth during the last five years (1998-2002) and they are ordered based on that growth.

**Table 4.a. CONSUMER ORIENTED PRODUCTS THAT HAVE SHOWN THE HIGHEST AVERAGE GROWTH (CY 1998-2002)**

PRODUCT	2002	AVERAGE VALUE (US\$1,000)	AVERAGE GROWTH (1998-2003)
1. Wine and Beer	11,267	4,325	77.11
2. Nursery Products and Cut Flowers	388	259	76.20
3. Tree Nuts	1,432	846	34.17
4. Red Meats, Prepared/Preserved	2,825	2,168	31.86
5. Fresh Fruit	9,675	7,754	19.72
6. Pet Foods (Dog and Cat Food)	3,366	2,885	12.40
7. Red Meats, Fresh/Chilled/Frozen	5,220	7,189	7.12
8. Snack Foods (Excl. Nuts)	12,617	12,868	6.65
9. Processed Fruit and Vegetables	11,765	10,452	2.98
10. Fruit and Vegetable Juices	6,081	7,061	2.86
11. Breakfast Cereals & Pancake Mix	4,360	3,993	2.68

Source: Prepared based on data from 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 sales potential, are dairy products (although the import permit problem is a constraint), breakfast cereals, and processed fruits and vegetables.

#### Products Not Present in Significant Quantities but with Good Sales Potential

There are few products from the United States, which have not been already introduced into the Dominican market. The Dominican Republic usually follows the same trend as the United States. Diet/healthy products. Although not present in large quantities, these products are present and have a separate shelf location. There are also health food mini-stores, which are also being opened in response to public demand.

**Products Not Present Because They Face Significant Barriers**

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

**V. POST CONTACT AND FURTHER INFORMATION****FOREIGN AGRICULTURAL SERVICE**

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

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

**ASOCIACION DE MAYORISTAS DE PROVISIONES DE SANTO DOMINGO, INC. (WHOLESELLERS ASSOCIATION)**

Mr. Mario Antonio Uceta  
President  
Ave. 27 de Febrero #375  
Santo Domingo, Dominican Republic  
Tel: (809) 565-6519 and 567-7995  
Fax: (809) 472-3048

**FEDERACION DE COMERCIANTES DETALLISTAS DE LA REPUBLIC DOMINICANA, INC. (MOM & POP'S FEDERATION)**

Mr. Gilberto Luna, Presidente  
Federación de Com. Det. de la RD, Inc.  
Calle Juan Erazo #61  
Santo Domingo, Dominican Republic  
Tel. 221-9035  
Fax. 682-8122

**SECRETARIAT OF STATE FOR INDUSTRY & COMMERCE**

Lic. Sonia Guzman de Hernández  
Secretary of State for Industry & Commerce  
Edif. Gubernamental Juan Pablo Duarte "El  
Huacal ", 7th Floor, Santo Domingo, Dominican Republic  
Tel: (809) 685-5171 Ext. 224/688-2489  
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E-mail: [ind.comercio@codetel.net.do](mailto:ind.comercio@codetel.net.do)



## APPENDIX I

## MAJOR FOOD IMPORTERS/DISTRIBUTORS IN THE DOMINICAN REPUBLIC

## MAJOR SUPERMARKETS

**SUPERMERCADO NACIONAL C x A.**

José Miguel González C., Executive President  
Av. Abraham Lincoln esq. Ave.27 de Febrero  
P.O. Box No. 1241  
Santo Domingo, D.R.  
Tel: (809) 565-5541/537-5017/566-2160  
Fax: (809) 537-2719/473-8606  
[www. : mmartinez@ccn.net.do](mailto:mmartinez@ccn.net.do)

**SUPERMERCADO POLA, S.A.**

Román Ramos, President  
Miguel Parada, Imports Manager  
Ave. Winston Churchill esq. Angel Severino Cabral  
Santo Domingo, D.R.  
Tel: (809) 472-4444/532-9575(Sarasota)  
Fax: (809) 683-1373  
[m.paradas@importadoraocanica.com](mailto:m.paradas@importadoraocanica.com)

**HIPER MERCADOS OLE S.A.**

José Manuel Rodríguez, President  
Ave. Duarte # 194  
Santo Domingo, D.R.  
Tel: (809) 536-1717/372-0909  
Fax: (809) 536-6411

**SUPERMERCADO LA CADENA (Mercatodo)**

Juan E. Ramos Vicente, President  
Juan Enrique Ramos, General Manager  
Ave. Abraham Lincoln #751  
Santo Domingo, D.R.  
Tel: (809) 565-0000  
Fax: (809) 565-0008/566-7302  
E-mail: [mercatodo@codetel.net.do](mailto:mercatodo@codetel.net.do)

**PRICE SMART**

Pedro Vera, Operations Manager  
Av. Charles Summers #54  
Los Prados  
Santo Domingo, D.N.  
Tel: (809) 334-3333/334-3434  
Fax: (809) 947-9551  
E-mail: [pricesmart@psmtdr.com](mailto:pricesmart@psmtdr.com)

**SUPERMERCADO PLAZA CD**

Angel Diómedes Calderón, President  
Calle Nicolás de Ovando # 350  
Ensanche La Fe  
Santo Domingo, D.R.  
Tel: (809) 566-1717/566-0550  
Fax: (809) 472-7925  
Email: [casadiomedes@hotmail.com](mailto:casadiomedes@hotmail.com)

**SUPERMERCADO BRAVO (BEMOSA)**

Rafael Monestina, President  
Ave. Winston Churchill # 1452  
Santo Domingo, D.R.  
Tel: (809) 227-2605  
Fax: (809) 472-5570  
E-mail: [super.bravo@codetel.net.do](mailto:super.bravo@codetel.net.do)

**CARREFOUR**

Agustín Santos, General Director  
Carretera Duarte Km.10 ½  
Santo Domingo, D.R.  
Tel: (809) 412-2333  
Fax: (809) 412-2800  
E-mail: [asantos@gbh.fr](mailto:asantos@gbh.fr)

**SUPERMERCADO PLAZA LAMA**

Victor Arias, Purchasing Director  
Avenida Duarte No. 78  
Santo Domingo D.R.  
Tel: (809) 687-9171 Ext. 2044  
Fax: (809) 333-5203

**APPENDIX I (CONT.)****FRUIT IMPORTERS (APPLE, PEAR & GRAPES)****R. H. MEJIA & CO., C. x A.**

Ramón H. Mejía, President  
José Contreras #66  
Santo Domingo, D.R.  
Tel: (809) 532-5061/543-3208  
Fax: (809) 532-3947  
E-mail: [rhmejia@codetel.net.do](mailto:rhmejia@codetel.net.do)

**GENESA, S.A.**

José Gabriel Rodríguez, President  
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Santo Domingo, D.R.  
Tel: (809) 561-5002/5009  
Fax: (809) 561-5056/5005  
E-mail: [alm.import@codetel.net.do](mailto:alm.import@codetel.net.do)

**ALPA IMPORT, S.A.**

Regino Álvarez, President  
Prol. Av. Charles de Gaulle  
Cancino Adentro  
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**FRUTHO, S.A.**

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Tel: (809) 559-8523 / 559-8649  
Fax: (809) 559-8521  
E-mail: [carlosasuriel@internet.net.do](mailto:carlosasuriel@internet.net.do)

**APPENDIX I (CONT.)****GROCERY DISTRIBUTORS/IMPORTERS (EXCLUDING SUPERMARKET)****ALMACENES LEON C. X A.**

Juán León, President  
Luciano León, Purchasing Manager  
Carr. Duarte Vieja Esq. Aut. Duarte Km.10½  
C/Primera, Sector La Venta,  
Barrio Los Antillanos  
Santo Domingo, D.R.  
Tel: (809) 564-6770/6775  
Fax: (809) 372-7644  
E-mail: [l.leon@codetel.net.do](mailto:l.leon@codetel.net.do)

**CASA VELAZQUEZ C x A**

Arturo Méndez, Gral Manager  
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Ensanche Miraflores  
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Fax: (809) 221-2934  
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**SUAREZ HNOS., C x A**

Alfredo Suárez, President  
Charles Lindberg No. 1  
Ensanche Miraflores  
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Fax: (809) 565-8592

**ALVAREZ & SANCHEZ C.X A.**

José A. Álvarez, President  
José A. Álvarez, Jr. General Manager  
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**MANUEL GONZALEZ CUESTA**

José Ml. González Corripio, President  
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Ave. México esq. Abraham Lincoln  
La Esperilla  
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Tel: (809) 566-2161  
Fax: (809) 566-2888/541-3457  
E-mail: [mgc@codetel.net.do](mailto:mgc@codetel.net.do)

**APPENDIX I (CONT.)****MEAT IMPORTERS****DOMINICAN TRADING CO.**

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

**DEMETRIOS GOURMET**

Pascual Prota, President  
Alejandro Fernandez , Purchasing Manager  
Calle Victor Garrido Puello #1 37  
Ensanche Evaristo Morales  
Santo Domingo, D. R.  
Tel: (809) 563-8777  
Fax: (809) 563-8775

**CARNES SELECTAS NELLOS**

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

**CONGELADOS DEL CARIBE**

Miguel Paulino, General Manager  
Ave. Monumental No. 24  
La Yuca  
Santo Domingo, D.R.  
Tel: (809) 922-8585  
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E-mail: [congeladosdelcaribe@hotmail.com](mailto:congeladosdelcaribe@hotmail.com)

**APPENDIX I (CONT.)****WINE/LIQUOR IMPORTERS****EL CATADOR, S. A.**

Guisepppe Bonarelli, President  
Guisepppe Bonarelli, Hijo, General Manager  
Calle Virgilio Díaz Ordoñez # 43  
Ensanche Evaristo Morales  
Santo Domingo, D.R.  
Tel: (809) 540-1644  
Fax: (809) 540-1688  
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**MARCAS PREMIUM/  
CAVAS DEL MUNDO**

Kenneth Broder, President  
Ave. Abraham Lincoln #1061  
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Calle Charles Lindberg No. 1  
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Tel: (809) 567-4221, Fax: (809) 565-8592

**BODEGAS JULIAN BARCELO E HIJOS, C. x A.**

Julián Barceló Vallejo, President  
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**APPENDIX I (CONT.)****WINE/LIQUOR IMPORTERS (CONT.)****VINOS, S. A.**

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Santo Domingo, D.R.  
Tel: (809) 532-1566, Fax: (809) 532-0076  
E-mail: [vinos.sa@codetel.net.do](mailto:vinos.sa@codetel.net.do)

**PASTORIZA, C. x A.**

Guillermo Enrique Alvarez y Garcia Godoy, President  
Av. Lope de Vega# 28/ Rafael A. Sánchez  
Santo Domingo, D.R.  
Tel: (809) 565-4105/559-7486/7484  
Fax: (809) 547-3401

**H. REGINATO & SUCS.**

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Santo Domingo, D.R.  
Tel: (809) 565-7364, Fax: (809) 565-0848  
E-mail: [reni.sa@codetel.net.do](mailto:reni.sa@codetel.net.do)

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