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Dominican Republic

HRI Food Service Sector

Annual

2004

Approved by:

David G. Salmon
U.S. Embassy, Santo Domingo

Prepared by:

Wagner Mendez

Report Highlights:

The Dominican Republic is one of the main tourist destinations in the Caribbean region, with over 2.7 million tourist arrivals in 2003, up 20 percent from 2002. Total food consumption in the HRI sector is over US\$1 billion. Around 45 percent of the total food and beverage consumption in the country is imported, with 50-55 percent of the import total coming from the United States. In spite of the country's current financial crisis, the outlook for U.S. food service product exports remains very positive.

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 hotel, restaurant and institutional sector, which is one of the largest in the Caribbean, is comprised of a diverse tourism sector, business hotels, upscale and more informal restaurants, and fast food franchises. Consumption of food and beverages in the Dominican Republic's (DR) non-tourist sector was estimated at US\$700 million in 2003. Consumption at all-inclusive resorts is estimated at \$443.3 million, for a total of over US\$1 billion for the two sectors. Use of imported products in the institutional sector is limited, reducing the attractiveness of this segment to U.S. exporters.

Around 45 percent of the total food and beverage consumption in the country is imported, with 50-55 percent of import total coming from the United States. The percentage is higher in the HRI sector, where there is a preference for imported food products, due to higher and more consistent quality. However, it is important to note that the DR's food processing industry is improving its efficiency and competitiveness. This means competition from domestic products will likely grow. However, the recently negotiated free trade agreement between the United States and the DR, if approved by both countries, will provide significant new openings for a wide range of products, as tariffs are lowered and non-tariff barriers on meat and dairy products are removed.

There are several trends in the HRI sector that bode well for future demand for imported food products. Over 40 percent of women have now joined the workforce and the percentage will continue to grow. This results in higher demand for meals outside the home and more convenience in retail food products. An increase in the number of Dominicans taking vacations in country is pushing up food consumption in the HRI sector. Increasing menu diversification, as Dominicans internationalize their consumption habits, is also increasing demand for imported products in the sector. Fast food is well established in the market, and there is an increase in the consumption of pizzas, hamburgers and other types of fast food. An increase in tourism promotion by the Dominican government both internationally and domestically is helping to support a steady recover from the dramatic decline in tourism after the 9/11 disaster in 2001.

ECONOMIC SITUATION

The Dominican Republic was, until recently, seen as a bright spot in the Latin American economic picture, with highest sustained economic growth in the hemisphere for the five-year period through 2002, averaging 7.6 percent. However, building economic problems in 2003 were exacerbated by a spectacular bank collapse and default, which resulted in negative 3 percent GDP growth in 2003. Inflation that was 10.5 percent in 2002 soared to over 40 percent, and the Dominican peso, which averaged 18.54 to the U.S. dollar during 2002, lost more than half its value and is now trading at around 43 pesos to the dollar. U.S. trade data for 2003 show Dominican imports of U.S. agriculture, forestry, and fishery products off by nearly 15 percent. And consumer-oriented product imports were especially hard hit, plummeting by 28 percent.

Although the crisis is severe, the Dominican economy is felt to be fundamentally sound and will recover from this setback. The tourism sector is booming and there are significant dollar earnings from other exports. However, the effects of this financial crisis will be significant in 2004. Approximately 45 percent of the national budget for 2004 will go toward servicing debt. The Dominican government has negotiated a new loan agreement with the

International Monetary Fund (IMF), which should help to stabilize the economy. The IMF projections for 2004 are for GDP growth of negative one percent, with inflation of 15 percent.

ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN THE DOMINICAN REPUBLIC

Advantages	Challenges
<ul style="list-style-type: none"> • American culture has a great influence on the Dominican Republic, driven by the large number of Dominicans living in the United States and domination of U.S. mass media, such as cable TV. • The growth of tourism in the country, which is booming this season, is increasing demand for imported products in that sector. • The current economic crisis will have little effect on the tourism industry, since it is dollar based and somewhat insulated from the rest of the economy. • The recently negotiated free trade agreement with the Dominican Republic, once signed, will likely improve access for meat and dairy products and should help to improve Customs clearance. • Fast food chains and other types of restaurants from the U.S. are very popular in the country. • U.S. suppliers can provide products with consistent and reliable quality and quantity, which helps reduce overall food service costs. 	<ul style="list-style-type: none"> • The current financial crisis will have a negative effect on restaurant and hotel food service sales. • The local Dominican food industry is becoming more efficient and more competitive, as is integrating new technologies into production. • 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 increase demand for foods from those countries. • The prices of products offered in fast food restaurants of U.S. origin are relatively high. • In the Dominican Republic, there are currently significant tariff and non-tariff barriers to imports of meat and dairy products. • The Dominican Republic just signed a free trade agreement with the other Caribbean countries, which may increase trade within this area, possibly at the expense of U.S. • The weakening of the Dominican peso makes U.S. products more costly.

II. ROAD MAP FOR MARKET ENTRY

A. ENTRY STRATEGY

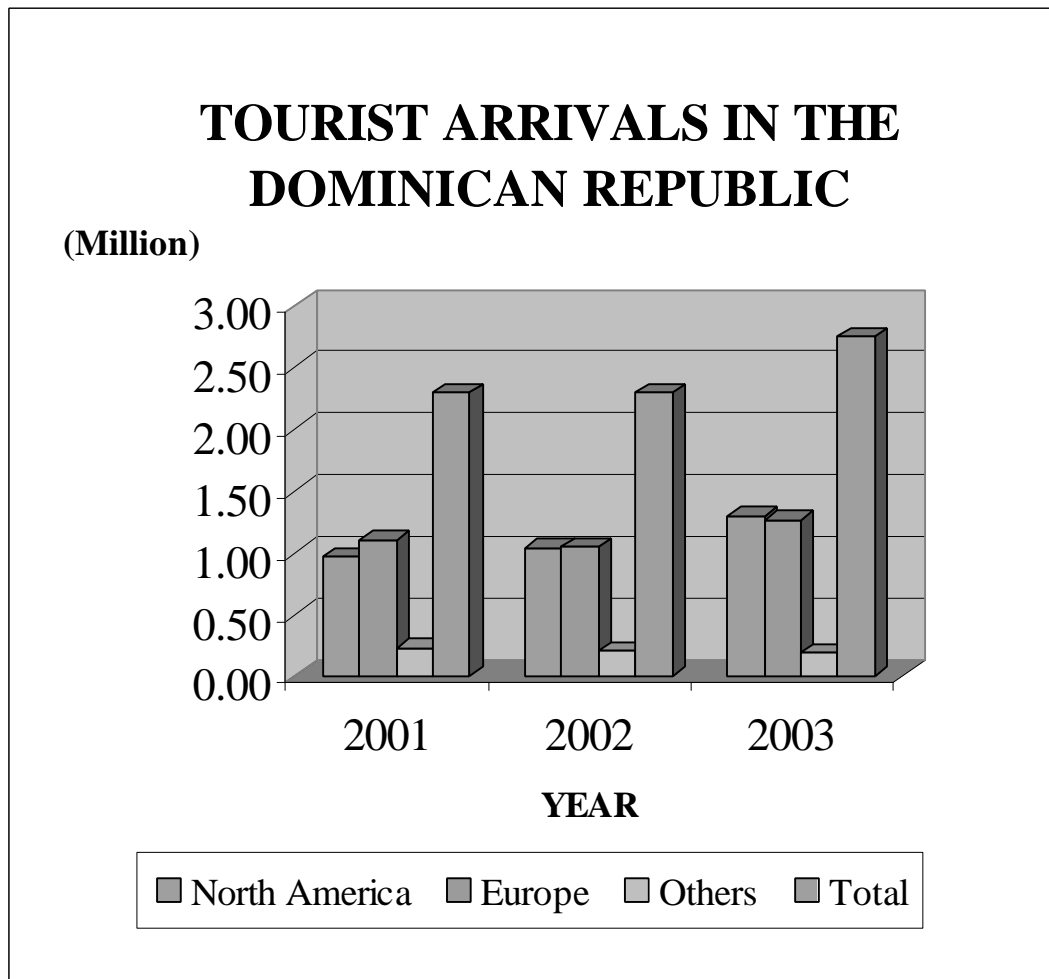
Resorts: Most major resorts, which sell all-inclusive packages to tourists, source some products directly through central buying sections, but they also procure many products directly from local importers. These importers must be highly reliable in supplying the products needed for their food service operations. They also serve the function of rapidly sourcing products to fill gaps when a resort finds itself facing a supply problem in its normal supply channel. In some cases, central buying entities are located in Miami, but other European owned resorts source through buying units located there. This will make it more difficult to get products into these resorts. Depending on the product, approaching the

central buying unit or proceeding through an importer/distributor in the DR might be best. A list of importers that specialize in supplying resort hotels is included in this report.

Business Hotels/Restaurants: Dominican business hotels and upscale restaurants source almost all of their food products from importer/distributors. Although it may be useful to approach the food and beverage managers at hotels and restaurant owners directly to introduce new products, if there is interest the product, will be turned over to a normal supplier to source. Therefore, we feel that the most efficient manner to enter this segment of the HRI market is through an established importer/distributor. If your company has the resources, you may want to hire a local representative, in order to promote your products to the major importer/distributors and the purchasing departments of the major hotel chains.

Fast Food: As is always the case, fast food chains from the United States import their own products and ingredients through established franchise channels. Dominican fast food restaurant serve traditional foods, which are almost exclusively sourced domestically.

B. MARKET STRUCTURE



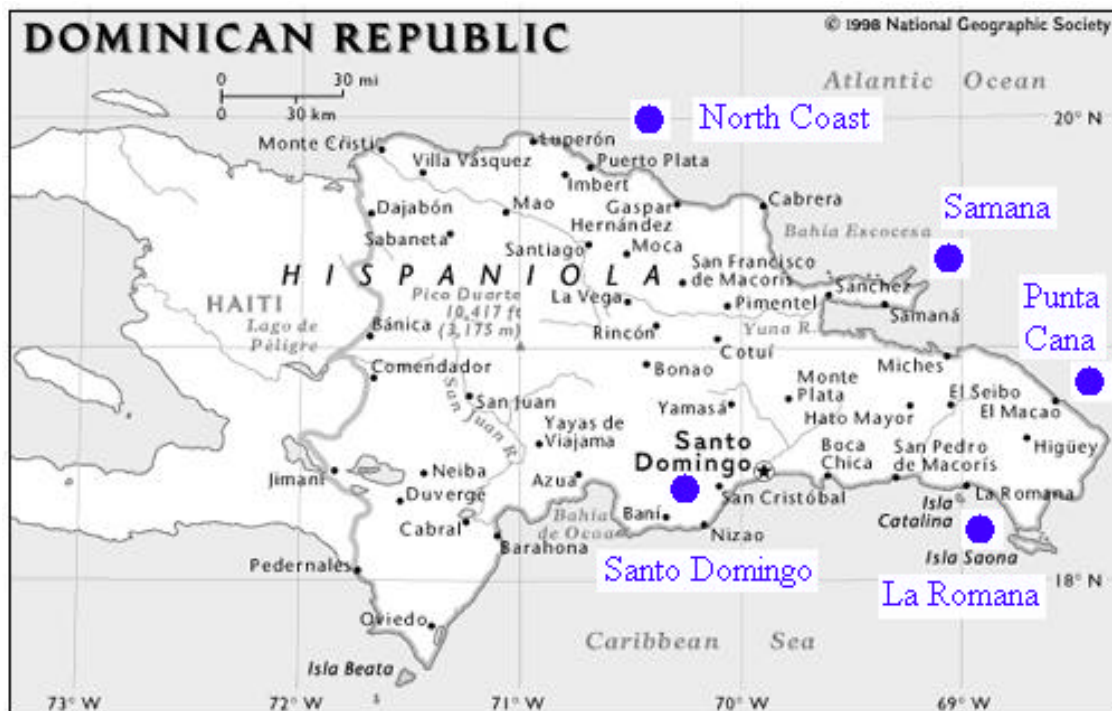
The Dominican Republic is one of the main tourist destinations in the Caribbean region, with over 2.7 million tourist arrivals in 2003 in an industry with over 54,000 hotel rooms. The average occupancy rate in 2003 was 72.7 percent, up sharply from 64.1 percent in 2001, the year of the 9/11 disaster, and 62.8 percent in 2002. Since the third quarter of 2002, the Dominican Republic's tourism industry has recovered steadily, with foreign tourist arrivals up 20 percent in 2003. August 2003 was an especially solid month, due to the celebration of the Pan American Games, which drew thousands of athletes, media and spectators to Santo Domingo. In 2003, the breakdown of tourist origin was as follows: Europe, (46.1%), United States (31.5%), Canada (15.0%), South America (3.5%), Central America and Caribbean (3.1%), and Others (0.8%). The tourism sector is growing, with several new hotel openings 2003 and others projected for 2004.

There have been major changes in the food operations in resorts over the past five years. Around 80 percent of hotels in the country are now resort-style, i.e., all-inclusive. Offering a relatively low all-inclusive price means that hotels must control food costs, while meeting their guests' expectations for quality and variety. Tour operators have sharply increased demands on hotels to improve the quality and safety of the foods they offer to the point of wielding influence over the type of supplier used. At times they require that specific firms be contracted to ensure that quality control practices are met. Local competition has also increased substantially, due to increases in domestic product quality. There is also a trend towards using semi-processed products to reduce costs.

Supply channels are not too complex. 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. As a result, there are suppliers that only handle specific products, such as meats, 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 mom n' pop stores. 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.

The principal tourist beach resort areas in the country are indicated on the map below. Punta Cana and La Romana are characterized by large all-inclusive resorts, whose occupants mainly arrive in large groups via tour packages. In most cases they never leave the resort during their stays, which average just over ten days. Although there are large all-inclusive resorts in the Samana and North Coast regions, tourism in these areas is much more diverse, characterized by smaller hotels, cabanas, and individual rentals, that cater to families and the younger more active tourist set. Especially the North Coast is a windsailing and kite boarding Mecca. Santo Domingo is a tourist destination in its own right, being the oldest city in the Western Hemisphere, founded in 1498 by Fray Nicolas de Ovando.



C. SUB-SECTOR PROFILES

1. Resorts

The resort/hotel sector is the largest market segment in this area, due to the recovery of tourism, especially in 2003. The Dominican Republic is receiving increasing worldwide recognition as a premier vacation destination, which has made it an attractive venue for fairs, conferences, conventions and international events. These factors contribute to an increasing flow of business people to the country.

COMPANY PROFILES

Name of Resort	Locations	Number of Hotels	Total Rooms	Purchasing Agent
Barceló Hotels	Santo Domingo/ Juan Dolio/ Punta Cana/Bávaro, Barahona,	16	4,323	Importer / Direct
RIU	Punta Cana/Arena Gorda/ Bávaro/Puerto Plata	8	3,490	Importer / Direct
Occidental Hotels/Allegro	Santo Domingo/ Las Pascualas/Sosua / Las Terrenas/Punta Cana/ Bavaro/Puerto Plata/Samana	9	3,486	Importer / Direct
Iberostar	Arena Gorda/ Puerto Plata/ Bayahibe/Punta Cana / Bávaro	5	2,401	Importer / Direct
Fiesta Hotels	Santo Domingo/Bávaro	2	880	Importer / Direct

AMHSA HOTELS	Playa Dorada/Sosua/ Cabarete/Samana/ Las Terrenas/ Bávaro / Punta Cana/Juan Dolio	8	2,431	Importer / Direct
LTI	Punta Cana/Sosua/ Bávaro	3	1,680	Importer
Coral by Hilton	Bayahibe/Juan Dolio/ Boca Chica/Puerto Plata	4	2,002	Importer
Hotetur	Boca Chica/Puerto Plata	3	847	Importer
Princess Hotels	Punta Cana/ Bávaro	3	1,415	Importer
Sol Melia	Punta Cana/Bavaro/ Santo Domingo	3	1,789	Importer
Super Clubs	Sosua/Punta Cana/Bavaro	2	1,169	Importer
Premier Hotels Casa de Campo	La Romana	1	300	Importer

1. Business Hotels

Most of the hotels listed below are in the capital city, Santo Domingo. They are basically business hotels but are used by tourists interested in the Colonial City and other tourist attractions in Santo Domingo. Most are part of large worldwide hotel chains.

There are several large hotel projects also in planning in the Santo Domingo area, with the most important being the Malecón Center complex on the waterfront, which is nearing completion. The landmark 194,000 square meter residential, commercial and high-rise hotel complex has three 30-story towers and an ocean view terrace. The Malecón Center features five movie theatres, 175 store locations, office space, and restaurants. Hilton will be operating a 22-floor, 228 room hotel in the complex, with gymnasium, casino, and meeting rooms with capacity for 1,300 persons.

DOMINICAN BUSINESS HOTELS

Name of Hotel	Locations	Number of Hotels	Total Rooms	Purchasing Agent
Renaissance Jaragua	Santo Domingo	1	293	Importer / Direct
V Centenario Intercontinental	Santo Domingo	1		Importer / Direct
Melia Santo Domingo	Santo Domingo	1	245	Importer / Direct
Hotel Embajador	Santo Domingo	1	286	Importer / Direct
Hotel Santo Domingo /Hispaniola	Santo Domingo	2	215/165	Importer / Direct
Dominican Fiesta	Santo Domingo	1	331	Importer / Direct
Hotel Naco	Santo Domingo	1	106	Importer / Direct

Hotel Plaza Naco (Clarion)	Santo Domingo	1	213	Importer
Barcelo Gran Hotel Lina	Santo Domingo	1	217	Importer
Hotel Courtyard (Marriot)	Santo Domingo	1	146	New
Hotel El Gran Almirante	Santiago	1	156	Importer/ Distributor

2. Restaurants

Santo Domingo has an extensive up-scale restaurant sector, which caters to the wealthier classes, businesses and tourists. The economic crisis that began in 2003 has hurt business for many of these establishments, but not to the point of forcing closures. The list below is only the main upscale restaurants in Santo Domingo. There are many others. All of them have international menus and individual specialties. Ethnic restaurants include German, Arabic, Argentine, Spanish, French, Italian, Mediterranean, Mexican, and Chinese.

Restaurants offer good opportunities for exporters from the United States. Most buy from local importer/distributors and a few import some products directly. To meet the needs for international dishes, they import beef, fish and seafood, pasta, and hams. Since these restaurants do not function as chains and purchases are small, they source almost all products through importer/distributors.

The general trend towards eating out has led to the opening of many small restaurants focusing on the lunch crowd, 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.

DOMINICAN UPSCALE RESTAURANTS

Name of Restaurant	Locations	Type of Cuisine	Purchasing Agent
La Bricciola	Santo Domingo	International	Importer/Direct
Davy Crockett	Santo Domingo	Steak House	Importer/Direct
Fellini	Santo Domingo	Italian	Importer/Direct
Outback Steakhouse	Santo Domingo	Australian	Importer/Direct
Scherezade	Santo Domingo	Mediterranean	Importer/Direct
Taboo Bamboo	Santo Domingo	Asian	Local Purchasing
Bella Cristal	Santo Domingo	Cantonese	Importer/Direct
Juan Carlos	Santo Domingo	Spanish/French	Importer/Direct
Toscana	Santo Domingo	Italian	Importer/Direct
Mytos	Santo Domingo	Steak House	Importer/Direct
Tony Romas	Santo Domingo	Steak House	Importer/Direct
Samurai	Santo Domingo	Japanese	Local Purchasing
Pepperoni	Santo Domingo	Pastas	Local Purchasing
Seasons	Santo Domingo	Creative Foods	Local Purchasing
Vesuvio I & II	Santo Domingo	Italian	Local Purchasing

3. Fast Food

Fast food restaurants are the fastest growing sector in the food service industry. 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 48 of these establishments have been opened, mostly in Santo Domingo and Santiago. The entry of foreign fast food chains has spurred the development of local businesses, although they tend to specialize in local popular foods. Many of them import their own products, primarily in the case of hamburger, meats, chickens, potatoes, sauces and ice cream. Fresh vegetables and bread are procured domestically.

FAST FOOD RESTAURANT PROFILES

Name of Restaurant	Locations	Number of Outlets	Purchasing Agent
Burger King	Santo Domingo, Santiago, San Francisco, La Vega, Puerto Plata, Boca Chica, La Romana, Punta Cana	27	Direct
Wendy's	Santo Domingo	3	Direct
Kentucky Fried Chicken	Santo Domingo	4	Direct
Domino's Pizza	Santo Domingo, Santiago	6	Direct
Pizza Hut	Santo Domingo, Santiago	6	Direct
Taco Bell	Santo Domingo, Santiago	8	Direct
McDonalds	Santo Domingo, Santiago	3	Direct

3. Institutions

Many large businesses have set up cafeterias in order to offer food to their employees. These are independently run. Some free trade zones and industrial parks have also begun to install cafeterias, with the objective of offering inexpensive food of an acceptable quality. These cafeterias are more oriented to serving traditional dishes, with over 90 percent of ingredients being produced domestically. In this category there is limited opportunity for U.S. exporters, except for basic items and condiments offered at cut-rate prices. The handling of food in prisons and public hospitals has not been privatized and most inputs are sourced domestically.

III. COMPETITION

The level and types of competition faced will depend on the sector of the food service industry. There have been serious problems in obtaining import permits, which have been used to limit imports of meat and dairy products. Generally imports of other processed food products come in without problem. The recently negotiated DR-CAFTA free trade agreement, if approved, will provide better access for many products and lower duties, which will make U.S. products even more competitive.

Resorts: A number of resort changes have European ownership, cater to European tourist groups, and therefore, have a strong bias toward European products. However, the all-inclusive style requires that attractive food be served with a close eye on price. This does provide openings for many U.S. food and beverage products, because of competitive U.S. prices and lower transportation costs. Produce and fruit are generally sourced domestically, as well as ingredients for bread and pastry products.

Business Hotels/Restaurants: Although there is a European bias in many up-scale restaurants, the U.S. has a strong presence. Wine has been an especially difficult for U.S. suppliers, mainly because of the bias toward European wines for the perception of quality and from Chilean wines because of their price competitiveness. However, in the free trade agreement, the duties on U.S. wines were lowered to zero from 20 percent, which should increase interest in this sector.

IV. BEST PRODUCTS PROSPECTS

The following products are those that have shown the highest average growth during the past five years (1998-2003).

Table 1.a.
HIGH GROWTH RATE PRODUCTS
(Calendar 1998-2003)

PRODUCT	2003	AVERAGE VALUE (US\$1,000)	AVERAGE GROWTH % (CY 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	1432	846	34.17
4. Red Meat-Prepared/Preserved	2,825	2,116	31.86
5. Fresh Fruit	9,675	7,754	19.72
6. Pet Foods	3,366	2,885	12.40
7. Red Meats, Fresh/Chilled/Frozen	5,220	7,189	7.12
8. Snack Foods	12,617	12,868	6.65
9. Processed Fruit & Vegetables	11,765	10,452	2.98
10. Fruits and Vegetables Juices	6,081	7,061	2.86

11. Breakfast Cereals	4,360	3,993	2.68
Source: U.S. Census Data			

Products Present in the Market with Good Sales Potential

Other high-value products imported from the United States, which show good sales potential are beef and dairy products, although the import permits remain a problem.

Products Not Present in Significant Quantities with Good Sales Potential

Usually the Dominican Republic follows trends in the United States. Diet/healthy products, although not present in large quantities, are increasing in demand.

Products Not Present Because They Face Significant Barriers

Importers of meat and dairy products face continual problems in obtaining sanitary and phytosanitary (no objection) 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.

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

Local Address:

**OFFICE OF AGRICULTURAL AFFAIRS
U.S. EMBASSY-SANTO DOMINGO**
Avenida Pedro Henriquez Ureña, #133
La Esperilla. Santo Domingo.
Dominican Republic
Tel: (809) 227-0112
Fax: (809) 732-9454
Email: AgSantoDomingo@usda.gov
Home page: www.usemb.gov.do/fas.htm

NATIONAL ASSOCIATION OF HOTELS AND RESTAURANTS, INC. (ASONAHORES)

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

APPENDIX 1

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

Francisco Mendez, Purchasing Manager
Tel: (809) 686-5797
Fax: (809) 685-3827
E-mail: @barcelohotels.com.do

PUNTA CANA BEACH RESORT

Frank Rainieri, President
Isabel Inoa, Purchasing Manager
Punta Cana, D.R.
Tel: (809) 541-2714
Fax: (809) 540-5120
E-mail: iinoa@puntacana.com

OCCIDENTAL HOTEL & RESORTS

José Luis Herman, Purchasing Manager
Avenida Sarasota #65
Santo Domingo, Dominican Republic
Tel: (809) 221-2131
Fax: (809) 532-5306

PREMIER HOTELS

Adolfo Kiaty, Purchasing Manager
Manuel Rodriguez, Purchasing Director
Central Romana, La Romana, D.R.
Tel: (809) 686-1243
Fax: (809) 523-8154

IBEROSTAR

Bavaro, Dominican Republic
Jose Antonio Guijarro, Purchasing Manager
Tel: (809) 221-6500
Fax: (809) 688-6186

FIESTA HOTELS and RESORTS

FIESTA BAVARO
Juan Antonio Daura, Purchasing Manager
Tel: (809)221-8149
Juan Francisco Tur
Manager, International Purchasing
Tel: (Spain) 011-34-971312964

HOTETUR DOMINICAN BAY

Carlos Rubio, General Manager
Edwin Orlando Ventura
Purchasing Manager
Calle Juan Bautista Vicini,
Esquina 20 de Diciembre
Boca Chica, Santo Domingo, DR
Tel: (809) 412? 2001
Fax: (809) 412? 0687/523? 6310
Email:
economato.dominicanbay@hotmail.com

AMHSA MARINA HOTELS & RESORTS

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
E-mail: nsobrino@amhsamarina.com

LTI BEACH RESORT PUNTA CANA

Domingo Antonio Paez, Purchasing
Manager
Bavaro, Punta Cana, Dominican Republic
Tel: (809) 221-6640
Fax: (809) 221-4658
Cell: (809) 861-4582

SOL MELIA

Clarissa Ramirez, F&B Manager
Avenida George Washington #365
Santo Domingo, Dominican Republic
Tel: (809) 221-6666
Fax: (809) 686-0125
Email: meliasd@codetel.net.do

PRINCESS HOTELS

Antonio Cano Lopez, Corporate Purchasing
Manager
Bavaro, Dominican Republic
Tel: (809) 221-2311
Fax: (809) 686-5427
Email: antonio.cano@princess-hotels.com

**SUPER CLUBS BREEZES PUNTA CANA SPA
& CASINO RESORTS**

Ivette Rivera, Corporate Purchasing
Manager

Avenida 27 de Febrero No. 589

Los Restauradores, Santo Domingo, D.R.

Tel: (809) 412-8782/84

Fax: (809) 412-8578

RIU HOTELS & RESORTS

Mayerlin Domínguez, Purchasing Manager

Punta Cana/Bavaro, Dominican Republic

Tel: (809) 221-7515

Fax: (809) 221-1250

Email: purchase.puj@riu.com

II. BUSINESS HOTELS

A. SANTO DOMINGO

**MELIA SANTO DOMINGO HOTEL AND
CASINO**

Roberto Henriquez, General Manager

Clarissa Ramírez, F&B Manager

Avenida George Washington #365

Santo Domingo, D.R.

Tel: (809) 221-6666

Fax: (809) 686-0125

Email: meliasd@codetel.net.do

HOTEL SANTO DOMINGO

Kurt Tschamper, General Manager

José Soto, Purchasing Manager

Avenida Independencia, Esq. A. Lincoln

Santo Domingo, D.R.

Tel: (809) 221-1511/ 221-3675

Fax: (809) 535-4050, 533-7455

Email: 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

Email: h.lina@codetel.net.do

Website: www.barcelo.com

HOTEL DOMINICAN FIESTA

José Bonet, General Manager

Jaime Then, Purchasing Manager

Avenida Anacaona #1974

Los Cacicazgos

Santo Domingo, D.R.

Tel: (809) 562-8222, x7035

Fax: (809) 482-8938

Email: salesdominican@codetel.net.do

**RENAISSANCE JARAGUA HOTEL AND
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

E-mail: hjaragua@codetel.net.do

HOTEL V CENTENARIO

INTERCONTINENTAL

Svonko Siroki, General Manager

Juan Piñeiro, 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 (CLARION)

Johnny Bernal, President

Johnny Bernal (Son)

International Purchasing Manager

Calle Presidente González,

Esquina Avenida Tiradentes

Ensanche Naco

Santo Domingo, D.R.

Tel: (809) 541-6226/544-4112

Fax: (809) 541-7251

Email: hoplaza@internet.codetel.net.do

HOTEL & CASINO NACO

Manuel Pimentel, Owner

George O'Reilly, General Manager

Ronnie Ramirez, Purchasing Manager

Avenida Tiradentes No. 22, Ensanche Naco

Santo Domingo, D.R.

Tel: (809) 562-3100

Fax: (809) 544-0957

Email: hnaco@tricom.net

OCCIDENTAL EL EMBAJADOR
Belén Gómez, General Manager
Max Llorens, Purchasing Manager
Avenida Sarasota # 65
Bella Vista
Santo Domingo, D.R.
Tel: (809) 221-2131
Fax: (809) 532-5306

HOTEL EL GRAN ALMIRANTE (HODELPA)
Vicente del Rosario, General Manager
Dimas Hoeperman, F&B Manager
Avenida Estrella Sadhalá
Santiago, D.R.
Tel: (809) 580-1992
Fax: (809) 241-1492
Email: almirante@codetel.net.do

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
Email: 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
Email: 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) 562-5088
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
Jhonson Ng, Owner
Leonida Montilla, Manager
Calle José María Heredia #6
Gazcue
Santo Domingo, D.R.
Tel: (809) 686-3226
Fax: (809) 689-9562

T.G.I. FRIDAY'S RESTAURANT & BAR
Euclides Moncion, Operations Manager
Plaza Acrópolis 3rd Level
Av. Winston Churchill #25
Santo Domingo, Dominican Republic
Tel: (809) 955-8443
Fax: (809) 955-1100
Website: www.tgifridays.com

OUTBACK STEAKHOUSE
Omar Cepeda, General Manager
Plaza Acropolis
Av. Winston Churchill esq. Rafael Augusto
Sanchez
Santo Domingo, Dominican Republic
Tel: (809) 955-0001
Fax: (809) 955-0003

TONY'S ROMA
Giselle Taveraz, Purchasing Manager
Av. Sarasota No. 29
Santo Domingo, Dominican Republic
Tel: (809) 535-5454
Fax: (809) 532-7360

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
Email: steakh@tricom.net and
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 Peynado, Owner/Manager
Tel: (809) 227-2727/3443
Fax: (809) 227-3555

EL MESON DE LA CAVA
Otto Ricart, Owner
Radhames Ramirez, 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
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
Email: a.alonso@codetel.net.do

NEPTUNO'S CLUB (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 SPAGHETTISSIMO
Frederic Gollong, Owner
Paseo de los Locutores #13
Santo Domingo, D.R.
Tel: (809) 565-3708/547-2650
Fax: (809) 549-6443

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

MYTOS

Julio Hazim, Owner
Paseo de los Periodistas
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 PAPAARAZZO

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

IL CAPPUCHINO

Claudio Paccagnella, Manager
Av. Maximo Gomez No. 60
Santo Domingo, Dominican Republic
Tel: (809) 689-8600
Fax: (809) 687-2876

B. SANTIAGO DE LOS CABALLEROS

RESTAURANT EL PEZ DORADO

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

RESTAURANT EL PAPAARAZZO

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