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Report Name: Food Processing Ingredients Annual

Country: Dominican Republic

Post: Santo Domingo

Report Category: Food Processing Ingredients

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Report Highlights:

The Dominican Republic's food processing industry totaled \$3.09 billion for calendar year (CY) 2025, in activities categorized as "food industry." Beverages and other food products accounted for an additional \$1.09 billion during the same period. Key drivers in the industry consist of meat and dairy processing, wheat milling, and bakery products. The United States continues to be a leading supplier of essential ingredients, including meats, edible oils, fats, dairy products, and wheat. The continued expansion of supermarket chains' private-label offerings, particularly outside major cities, has diversified the food market. As a result, these brands have gained popularity, offering cost-effective alternatives while also introducing a broader range of products.

Executive Summary:

The Dominican Republic (DR) stands as an upper-middle income country with historically low and stable inflation. In 2025, the DR's gross domestic product (GDP) grew 2.1 percent year-on-year. The DR continues to be a key regional trade partner of the United States. In 2025, U.S. agricultural exports to the DR totaled over \$2.18 billion, reflecting a 13 percent increase compared to the previous year.

Consumer-Oriented Agricultural Imports

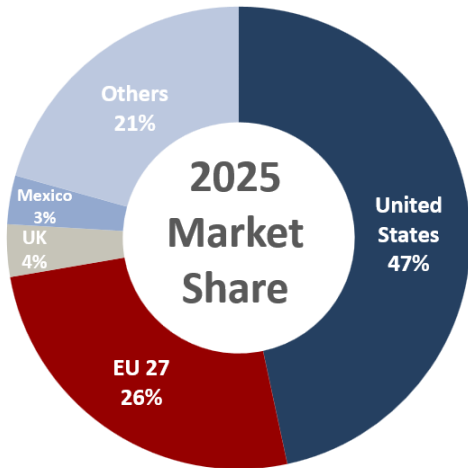


Chart 1: Top Exporting Countries to Dominican Republic
Source: TDM LLC

Food Retail Industry:

The modern retail sector in the Dominican Republic boasts an extensive array of U.S. products. The sector continues to remain largely dominated by locally owned companies. Supermarkets only account for 20-25 percent of retail sales. Most retail sales are still transacted in traditional channels, such as neighborhood stores (i.e. *colmados*) and warehouses.

Food Processing Industry:

As of September 2025, the Central Bank of the Dominican Republic (BCDR) valued the food processing industry at \$3.09 billion under the category of "food industry," with an additional \$1.09 billion attributed to processed beverages and other products. Key sectors, such as meat processing, wheat milling, bakery products, and dairy processing continue to be primary drivers. The United States remains a top supplier of meats, edible oils, fats, dairy products, wheat, and other essential ingredients.

Food Service Industry:

According to the BCDR, the food service industry, encompassing activities such as "hotels, bars, and restaurants, experienced a growth of 3.5 percent in 2025. The growth was largely driven by the demand from international tourism, which once again reached a record number of visitors in calendar year (CY) 2025 and generated US\$ 346.1 million in revenue for the DR's economy.

Quick Facts Calendar Year 2025

Imports of Consumer-Oriented Products (US\$ million)

World Total: \$2,854

List of Top 10 Growth Products in the DR

- | | |
|-----------------------------------|--|
| 1) Dairy Products | 6) Poultry Meat & Prods. (ex. eggs) |
| 2) Pork & Pork Products | 7) Processed Vegetables |
| 3) Soup & Other Food Preparations | 8) Beef & Beef Products |
| 4) Distilled Spirits | 9) Non-Alcoholic Bev. (e.g. juices, coffee, tea) |
| 5) Bakery Goods, Cereals, & Pasta | 10) Wine & Related Products |

Food Industry by Channels (U.S. billion)

Food Service-HRI	\$8.30
Food Processing	\$3.09
Food and Agriculture Exports	\$3.60

Top 10 DR Retailers*

- | | |
|--------------------------|--------------------|
| 1) Sirena | 6) Jumbo |
| 2) Bravo | 7) Sirena Market |
| 3) Hypermercados Olé | 8) Plaza Lama |
| 4) Nacional Supermarkets | 9) PriceSmart |
| 5) Aprezio | 10) Carrefour City |

GDP/Population

Population:	11.12 million
GDP (USD):	\$114 billion
GDP per capita (USD):	\$11,541.5

Median income per capita (USD): \$3,600

Source: Global Agricultural Trade System (GATS), Trade Data Monitor (TDM); World Bank. * Ordered by quantity of establishments.

Strengths/Weaknesses/Opportunities/Threats

Strengths	Weaknesses
<ul style="list-style-type: none"> Implementation of CAFTA-DR provides preferential tariff treatment for U.S. agricultural exports, compared to other foreign suppliers. Geographic proximity to the United States and growing demand for high-quality, diverse food products. 	<ul style="list-style-type: none"> Higher cost of some U.S. products compared to competitors. Agricultural exports may still face non-tariff barriers such as regulatory hurdles, and delays in import permits. Import sensitivity of several products.
Opportunities	Threats
<ul style="list-style-type: none"> Full implementation of CAFTA-DR by 2025. Expansion of middle class, which is seeking higher-value, more diverse food options. U.S. exports, are well-positioned to meet the demand 	<ul style="list-style-type: none"> Competition from other CAFTA-DR signatory and DR's other free trade agreement partners. Inflationary pressures, rising fuel prices, limited cold chain capacity, and supply chain disruptions could increase the cost of goods in the DR.

Figure 2. CAFTA-DR SWOT Analysis for U.S. Exports

SECTION I. MARKET OVERVIEW

Market Size

The Dominican Republic (DR) continues to demonstrate a strong and dynamic business climate, supported by robust economic growth, rising foreign investment, and a growing middle class. In calendar year (CY) 2025, the country recorded an annual inflation rate of 4.95 percent, according to the Central Bank of the Dominican Republic (BCDR). The DR's gross domestic product (GDP) expanded by 2.1 percent in 2025, with projections indicating continued growth for 2026 of 4.5 percent and similar levels in 2027.

Key sectors such as tourism, construction, manufacturing, and agriculture have experienced consistent growth, driven by the country's strategic geographic location, favorable trade agreements like the Dominican Republic - Central America Free Trade Agreement (CAFTA-DR), and ongoing infrastructure development.

The food processing industry, a vital component of the DR's economy, saw year-on-year growth of 1.2 percent in 2025, according to the BCRD. Specific subsectors within food processing performed as follows: sugar processing (10 percent), poultry meat (5 percent), processing of vegetable and animal oils and fats grew 5 percent, dairy products (3.4 percent), meat and seafood products (2.6 percent), milled rice (1.3 percent), and other food products (1 percent). In contrast, pasta production declined by 8.5 percent, while meat processing of other animal sources fell by 1.6 percent. In 2025, the Dominican Republic's service sector, specifically hotels, bars, and restaurants, experienced year-on-year growth rate of 3.5 percent. This growth is largely attributed to a 4-percent increase in visitors to the country.

Since the implementation of CAFTA-DR, U.S. ingredients have played a growing role in the DR's food processing sector. For more information, please refer to FAS Santo Domingo's 2025 [Exporter Guide](#)¹.

Advantages and Challenges

Advantages	Challenges
Full implementation of CAFTA-DR, which has eliminated duties on almost all products, except for rice. Growing food manufacturing industry, which demands new, innovative, and high-quality ingredients. Proximity among the countries and strong commercial and cultural ties. Efficient food distribution channels. Improved quality standards and enforcement. Consumers are greatly influenced by U.S. culture, with a positive perception of U.S. products.	Competition from other CAFTA-DR signees and the DR's other free trade agreement partners. Delays for import permits and sanitary registration, which can affect the availability of imported ingredients. Insufficient number of qualified technicians, which can limit production. High costs and inefficient electricity service, which increase production costs. Remaining cold chain challenges and limitations, which have been reduced, through USDA technical and financial support

¹

https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Exporter%20Guide%20Annual_Santo%20Domingo_Dominican%20Republic_DR2025-0011.

SECTION II. ROAD MAP FOR MARKET ENTRY

2.1. Entry Strategy and Distribution Channel

The Dominican Republic's food processing industry presents diverse entry opportunities for U.S. companies, especially those involved in the import and supply of raw materials, ingredients, and finished products. While some raw materials are sourced locally, many processed food products in the Dominican Republic incorporate imported ingredients, with a significant portion originating from the United States. This creates a strong opportunity for U.S. exporters to sell directly to local food processing companies or to partner with major importers and distributors.

Companies seeking to enter the market can use two primary channels for product importation: direct purchases by local food processors or through large-scale importers and distributors who manage the distribution of ingredients and finished products. These distributors play a pivotal role in ensuring that imported goods reach various market segments.

Once imported, processed products are distributed across retail, food service, and institutional channels. Retail channels, particularly supermarkets and hypermarkets, are rapidly expanding, especially in urban areas and among middle-to-high-income consumers. However, open markets remain an important and popular distribution channel, particularly for individuals with moderate to low incomes. These open markets are crucial to the economy, with approximately 80 percent of locally produced fruits and vegetables being distributed through them.

By leveraging relationships with local importers and understanding the preferences of the Dominican consumer who values affordability and product variety, U.S. companies can effectively establish a presence in the DR's dynamic food processing market. Additionally, partnering with established distributors can help navigate the local landscape, ensuring access to a broad customer base while maintaining flexibility in product pricing and availability.

2.2. Import Procedures

Import procedures for the DR are described in FAS Santo Domingo's 2025 [Food and Agriculture Import Regulations and Standards \(FAIRS\) Narrative Report²](#).

2.3. Distribution Channels

Dominican food products are distributed through a variety of channels, including supermarkets, hypermarkets, local stores (i.e. *colmados*), butcher shops, and bakeries. Distribution is heavily influenced by consumer loyalty to local stores, and *colmados* are still a dominant part of the retail market since flexible payment options are commonly offered. The rise of supermarket chains, particularly outside major cities, has diversified the food landscape, with cost-effective private-label products gaining popularity. Additionally, small local bakeries still play a significant role in distributing bread and other baked goods.

2

https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=FAIRS%20Country%20Report%20Annual_Santo%20Domingo_Dominican%20Republic_DR2025-0009

2.4. Market Structure, Share of Major Segments in the Food Processing Industry, Sector Trends

The Dominican Republic's food processing market is highly competitive, with a combination of local and international players. Key local brands dominate the market, particularly in processed meats, dairy, and wheat milling. In 2025, local companies such as Induveca S.A./MERCASID held a dominant 40 percent share of the processed meats market, while other companies like Molinos Modernos S.A. and Grupo Bocol controlled nearly 80 percent of the wheat milling industry. International brands compete, though often at a price disadvantage due to higher costs. The dairy industry is also heavily influenced by local producers, with Pasteurizadora Rica holding the largest share in 2025. The market continues to see increased competition from affordable imported products.

- **Processed Meats:**

An important component of the Dominican Republic's food processing sector is meat processing. According to Euromonitor International, the total retail market value for processed meat is \$216 million, reflecting 5 percent growth compared to the previous year. Notably, over 97 percent of processed meats are sold through retail distribution channels, including distributors and supermarkets (44 percent), hypermarkets (22 percent), with the remaining 32 percent sold in local mom-and-pop stores (i.e., *colmados*) and butcher shops. Dominican consumers have strong ties to these neighborhood stores, where they often benefit from flexible payment options and credit based on trust.

Dominican brands dominate the local market, driven by their diverse product offerings and competitive pricing strategies. A significant percent of Dominican households consume salami, which continues to lead total sales of processed meats. In 2025, products from the food processing company Induveca S.A./MERCASID dominated the local processed meats market, commanding a 39 percent share of retail sales. Other key players include Sigma Alimentos, which controls 17 percent of the market, and Productos Chef, with a 4 percent market share. Some private labels are gaining grounds as supermarkets expand throughout the country, with competitive pricing and the promise of high quality, the visibility of these private label brands has increased. While some international brands also compete in the processed meat sector, their products are priced higher, making them less accessible to many Dominican households.

In 2025, world exports of meat and meat products to the Dominican Republic ascended to \$673 million, reflecting a 3 percent increase year over year. The U.S. maintains its market share representing over 86 percent, a 7-percent increase year over year. This growth is largely driven by pork imports. In response to the spread of African Swine Fever (ASF), the DR has been actively working to improve its control and eradication disease efforts.

Competitors to the United States in the Dominican meat market include Brazil, the United Kingdom, Spain, and Australia. Key imported products include pork, poultry, frozen beef, and edible offal of bovine animals.

- **Wheat Milling:**

Wheat milling remains a key component of the DR's food processing industry, as the country depends entirely on imported wheat, sourced primarily from the United States and Canada. In 2025, the Dominican Republic imported \$175 million in wheat, representing a 17-percent decline from the previous year. The United States strengthened its market position, supplying 80 percent of total imports valued at \$140 million, reflecting an 8 percent year over year growth. In contrast, DR's imports of Canadian wheat fell by 56 percent, totaling \$28 million and accounting for 16 percent of the market.

Two major players, Molinos Modernos S.A. and Grupo Bocel, dominate the local milling industry, collectively processing nearly 80 percent of all wheat imports. These mills primarily produce wheat flour, which supports a growing and dynamic baked goods sector. They also manufacture most of the pasta, crackers, and cookies sold in the local market.

Demand for long-shelf-life packaged baked goods continues to increase as consumers prioritize convenience, although we see leavened bread remains the most popular baked good, particularly unpackaged varieties such as *pan de agua* and *pan sobao*, which are widely favored for their affordability and strong cultural significance. Despite this shift, small local bakeries still account for the majority of value sales, although modern grocery retailers particularly supermarkets and hypermarkets are expanding their baked goods offerings.

In 2025, retail sales of baked goods grew by 7 percent, reaching \$374 million. Cakes emerged as the top performing category, with retail sales having increased by 7 percent to \$25 million. Lumijor led the category with an 8 percent market share, followed by Pepina S.A. at 7 percent and Grupo Bolín at just under 7 percent. Despite the presence of these major brands, small local bakeries continue to generate nearly half of total value sales and serve as key suppliers to *colmados*.

- **Dairy:**

In recent years, the Dominican dairy processing industry has expanded its capacity, driving an 8 percent increase over 2025 in the total retail market value for dairy products. Local producers play a key role in this growth, with Grupo Rica holding the largest market share at 27 percent, followed by Mejía y Arcalá and Nestlé with each is in competition for third place. Sima Alimentos has made notable gains, now securing 7 percent of the market share. As supermarkets continue to expand across the country, the retail landscape is evolving. While *colmados* still play a significant role in retail sales, the growth of supermarkets, particularly outside major cities, is diversifying product offerings. Cost-effective private-label options are also gaining traction as consumer preferences shift.

Over 50 percent of domestic fluid milk is processed into cheese, while less than 5 percent is processed into yogurt. Most of these cheeses are produced by more than 400 small and medium-sized rural processing facilities. Although these locally manufactured products may differ from U.S. substitutes in variety, quality, and sanitary standards, larger local companies, such as Sigma Alimentos and Mejia Arcalá, offer products comparable to U.S. cheeses.

In 2025, the retail value of the Dominican Republic's cheese market grew by 8 percent, with Sigma Alimentos leading the sector and holding a 33 percent market share. Cheese imports also

increased significantly, rising by 20 percent during the year. This growth reflects a broader variety of cheese products available in the local market, including more affordable imported options. The European Union continues to dominate imports, accounting for 58 percent of the market, followed by the United States with a 39 percent share.

- **Sugar Confectionery:**

The Dominican Republic also has a substantial sugar confectionery sector that is projected to continue growing during 2026 due to its price point within its category compared to other types of snacks. While most sugar, cacao, and dairy products are sourced locally or from non-U.S. suppliers, other confectionery ingredients, such as nuts, are imported from the United States. In 2025, the total retail value of sugar confectionery in the DR reached above \$50 million, reflecting a 7 percent increase compared to the previous year. As consumer demand for healthier options continues to grow, low sugar alternatives are becoming increasingly popular.

Smaller processing companies continue to dominate overall sugar confectionery sales through the year-round production of traditional Dominican products categorized as “other” confectionery. At the same time, lollipops and chewy candies show a strong performance in this category, driven by expanding product variety and flavor innovation that particularly appeal to younger consumers. This trend is expected to persist as retail channels expand nationwide, with major supermarket chains increasing their footprint and opening new stores across multiple cities.

Key players in this sector are Cadbury Admas Dominicana, which holds a 20 percent market share, Panca at 7 percent, Manuel Gonzalez Cuesta at 6 percent, Arcor SAIC at 2 percent, Private Labels at 6 percent, and other small informal confectionaries at 57 percent of the market.

2.5. Company Profiles & Company Products

There are more than 1,000 companies classified as agro-industrial and processors in the Dominican Republic. Based on the market structure described in Section 2.3, below is a list of key processing companies:

COMPANY	KEY PRODUCTS
Meat Processing	
Induveca S.A./ MERCASID http://www.induveca.com.do	Processed meat, cheese, Shelf-stable milk, and yogurt
Sigma Alimentos https://www.sigma-alimentos.com/en/	Processed meat, cheese, butter, and yogurt
Productos Chef www.productoschef.com	Processed meat
AGROCARNE (Central Romana Corporation) www.centralromana.com.do/estructura-corporativa/man_ufactura	Processed meat and cheese
Wheat Milling	
Molinos Modernos S.A. www.molinosmodernosenlinea.com/rd	Wheat flour, pasta, and crackers
Grupo Bocel www.grupobocel.com	Wheat flour, pasta, cookies, and crackers

COMPANY	KEY PRODUCTS
Baked Goods	
Horneados Pepin S.A. www.panpepin.com/	Bread and pastry
Lumijor SRL www.lumijor.com.do/	Bread
Dairy Products	
Mejía Arcalá https://mejiaarcala.com/	Cheese and powdered milk
Grupo Rica www.gruporica.com/en	Shelf-stable milk, fruit juices and yogurt
Nestlé Dominicana S.A. www.nestle.do	Milk products, cereals, dehydrated soups, seasoning and pet food
Dos Pinos https://www.cooperativadospinos.com/	Shelf-stable milk, fruit juices and yogurt
Others	
Frito-Lay Dominicana S.A. www.fritolay.com	Snacks from plantains, cassava, potatoes, and spices
Quala Dominicana S.A. https://www.quala.com.do/	Seasonings, powdered juice, oat products
Unilever Caribe S.A. www.unilever.com.mx	Seasoning products and corn flour

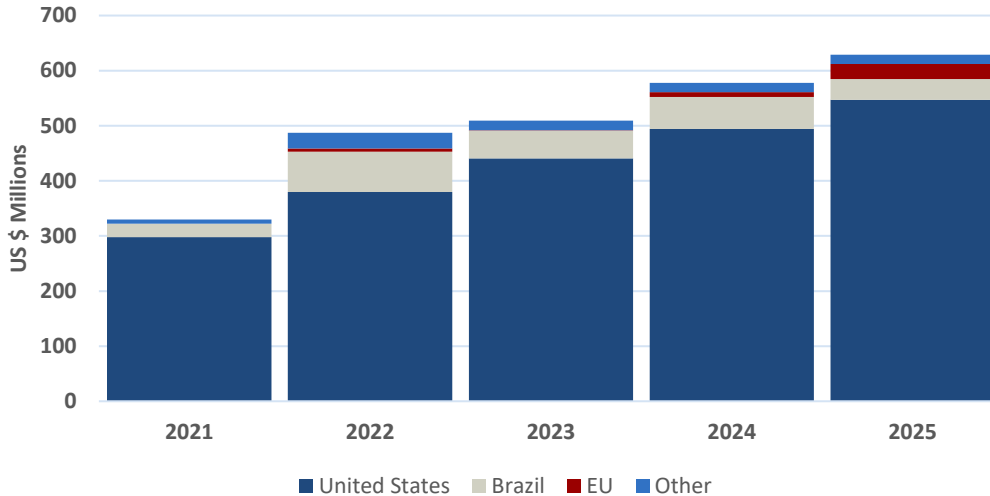
SECTION III. COMPETITION

Meat Products:

In 2025, the DR increased its total meat and meat product imports (HS 02) by 9 percent in value with DR imports from the United States rising 10 percent in a year-over-year comparison. Pork continues to be the strongest product under this category, capturing over 40 percent of the meat import market. Over the past five years, U.S. meat has consistently held a leading position in the local market, accounting for 85 percent of the DR's total meat imports, with an annual average value of \$432 million. Assuming this moderate growth rate trend continues, imports of meat and meat products for the DR are expected to exceed \$800 million by year 2030.

In 2025, the United States led the category capturing 87 percent of the market with a total value of \$547 million; other competitors in this category include the EU (4 percent market share) and Brazil. Brazil exports fell by 34% year-over-year, leaving Brazil with about 6 percent market share. DR continues to be an important export market for US Meat products, as it maintains its position as the 8th largest market for U.S. meat and meat products.

HS 02 Meat Exports to DR



The food processing industry is a key driver of U.S. agricultural exports to the DR, with pork ranking as the top U.S. agricultural product exported to the market. The sector remains the primary destination for the country’s top three imported meats, although post sees it slightly losing market share under this category. In CY 2025, pork remained the leading imported meat for the industry, with imports rising 1 percent compared to the previous year to reach \$278 million. The United States maintained a dominant position, supplying 96 percent of total imports and recording 6 percent year-over-year growth.

Following pork, poultry ranked as the second-largest imported meat category. In 2025, poultry rose 5 percent, reaching a total market value of \$137 million. The United States maintained a strong market position, supplying 85 percent of total imports and recording 20 percent growth year-over-year. Brazil followed with 15 percent of the market but experienced a 38 percent decline in exports to the Dominican Republic compared to the previous year.

The DR’s imports of meat during 2025 were largely dominated by imports of pork (HS 0203), which accounted for 44 percent of the market, followed by poultry (HS 0207) at 22 percent and frozen beef (HS 0202) at 20 percent collectively, these products constituted 86 percent of total meat imports for the country. Frozen beef registered the strongest growth among major meat categories, increasing by 17 percent in 2025, reflecting expanding demand from the HRI sector.

Other top trading partners of meat products for the Dominican Republic include Brazil, the United Kingdom, Spain and Australia.

Wheat Milling Products:

Over the past five years, U.S. wheat (HS 1001) has accounted for over 50 percent of total wheat imports in the Dominican Republic, averaging \$117 million in annual value.

For CY 2025, total wheat imports to the DR declined by 17 percent compared to CY 2024. The United States remained the dominant supplier, providing 80 percent of total imports, valued at \$140 million, an 8 percent increase from the previous year.

Canada remains the United States' primary competitor in the Dominican market, holding a 16 percent market share in 2025, a 56 percent decline from CY 2024.

Dairy Products:

Over the past five years, U.S. imports of milk and cream (HS 0402) to the Dominican Republic represented 25 percent of the import market, with an annual average value of \$35 million. Meanwhile, the European Union dominated this category, holding an average market share of 63 percent of total Dominican imports, over the last five years, valued at \$87 million.

In CY 2025, global exports of milk and cream to the DR totaled \$154 million. U.S. milk and cream exports to the Dominican Republic constituted 25 percent of the local import market, reflecting 12 percent growth compared to CY 2024, with a trade value of \$39 million.

SECTION IV. BEST PRODUCTS PROSPECTS CATEGORIES

The United States has consistently been a major supplier of meat, edible meat offal, and animal and vegetable fats for the Dominican meat processing industry; this trend is expected to continue. However, inflation continues to impact food prices, especially imported products, such as processed fruit, vegetables, and breakfast cereals, which have seen significant price increases. As a result, Dominican consumers remain price sensitive, contributing to a growing preference for more affordable, private label products over well-known brands, as households seek to reduce costs.

The Dominican Republic's staple foods market in 2025 showed strong potential for growth, with private label products standing out as a key trend. As local consumers remain price-sensitive, private label offerings have gained significant traction. In response to rising prices of staple foods, retailers have increasingly prioritized expansion of private label offerings. Supermarket chains, such as Grupo CCN (Jumbo and Nacional Supermarket), Grupo Ramos (Sirena, Sirena Market, Aprezio) and Bravo, have broadened their portfolios of ready-to-eat products, ranging from snacks to canned and frozen goods. These store brands offer consumers an affordable alternative, while supporting local producers, and with the anticipated stable growth in the economy, private label products are poised to capture an even larger share of the market.

There is still considerable potential to increase exports of U.S. ingredients to the milling, dairy, and confectionary industries, especially with the full implementation of CAFTA-DR. Post anticipates that this growth to occur primarily within products already available in the market.

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Dominican Institute for Quality Standards (INDOCAL)

(Ministry of Industry and Commerce)

Av. México esq. Leopoldo Navarro, Edificio de Oficinas Gubernamentales
Juan Pablo Duarte, Piso 11 (Edif. El Huacal), Santo Domingo, Dominican Republic

Contact: Ing. Néstor Julio Matos Ureña, Director General

Telephone: 809-686-2205

Fax: 809-686-2235

E-mail: servicioalcliente@indocal.gob.do

Web page: <https://indocal.gob.do/>

Comment: This bureau is part of the Ministry of Industry and Commerce and issues and enforces the application of NORDOM 53, which requires Spanish labeling and the sanitary registration number on all pre-packed retail food products. In addition, INDOCAL is where the Standard Committees (composed of both the private and the public sector) update the industry on a regular basis.

General Directorate of Customs (Dirección General de Aduanas - DGA)

Av. Abraham Lincoln No. 1101, Ens. Serrallés
Santo Domingo, Dominican Republic

Contact: Nelson de Jesús Arroyo Perdomo, Director

Telephone: 809-547-7070

E-mail: info@aduanas.gob.do

Web page: <https://www.aduanas.gob.do/>

Comment: DGA is the official entity in charge of customs and the local regulations related to it.

Foreign Agricultural Service Santo Domingo

Address: República de Colombia Av. #57, Arroyo Hondo, Santo Domingo, Dominican Republic.
U.S. Embassy in Santo Domingo, DR.

Phone: 809-368-7654

Email: agsantodomingo@usda.gov

<http://www.fas.usda.gov>

Comment: Please contact this office for more detailed information about the Dominican food market, lists of importers, major players in the sector, questions, etc.

Attachments:

No Attachments