



## Illegal alcohol in Dominican Republic

A custom report compiled by Euromonitor International  
for Cerveceria Nacional Dominicana

December 2017





**Introduction** / Executive Summary / Market Analysis / Category Analysis / Recommendations / Appendix



## ABOUT THE COMPANY

# Who is Euromonitor International

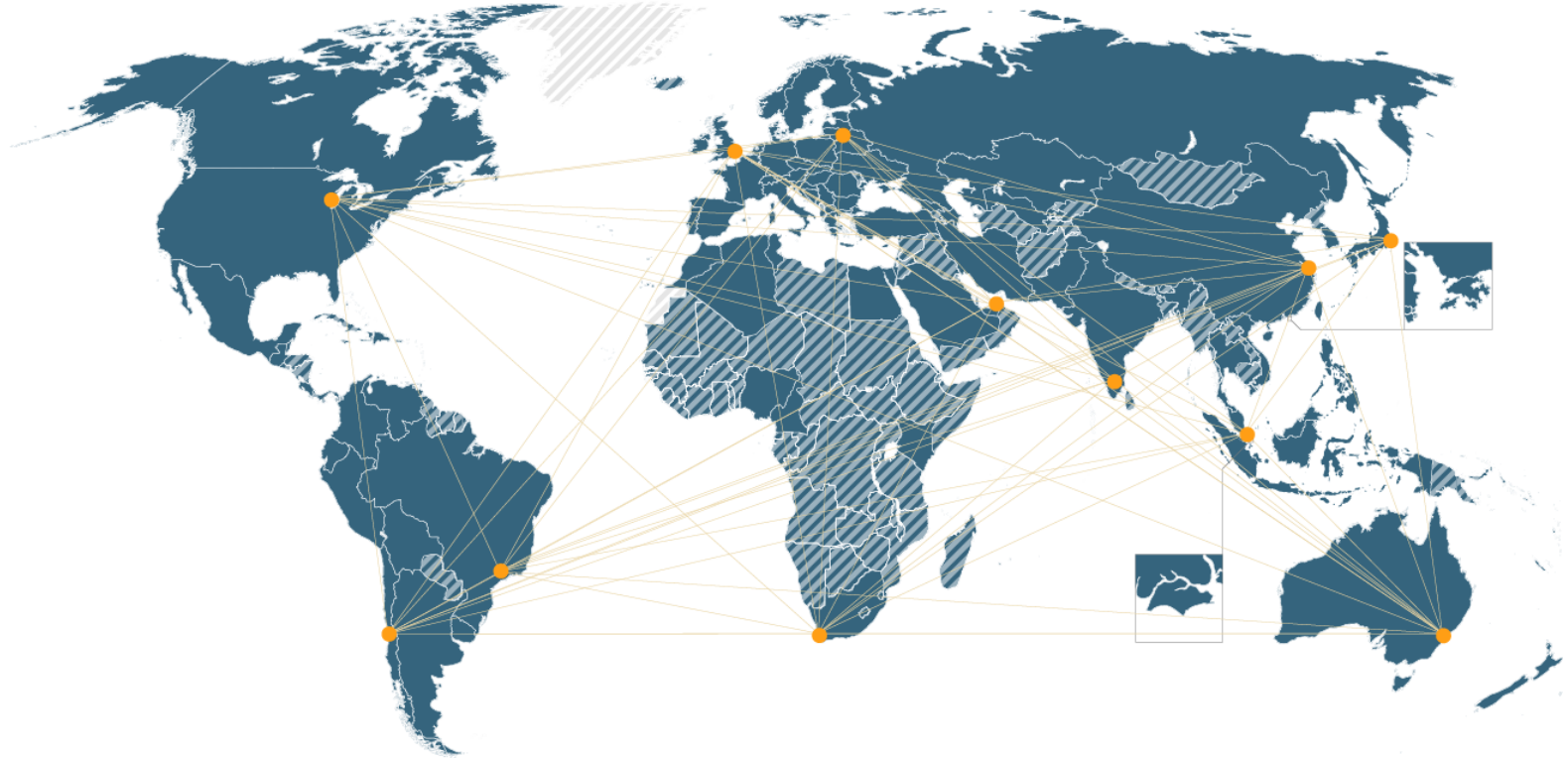


- Our Services
  - Syndicated Market Research
  - Custom Research and Consulting
- Expansive Network
  - On the ground researchers in 80 countries
  - Complete view of the global marketplace
  - Cross-comparable data across every market
- Our Expertise
  - Consumer trends & lifestyles
  - Companies & brands
  - Product categories & distribution channels
  - Production & supply chains
  - Economics & forecasting
  - Comparable data across markets



## ABOUT THE COMPANY

# Euromonitor International network and coverage



**12 OFFICE LOCATIONS**  
London, Chicago, Singapore, Shanghai, Vilnius, Santiago, Dubai, Cape Town, Tokyo, Sydney, Bangalore, and São Paulo

**100 COUNTRIES**  
in-depth analysis on consumer goods and service industries

**+ 210 COUNTRIES**  
demographic, macro- and socio-economic data on consumers and economies



## PROJECT DETAILS

# Project scope and objectives

## CATEGORY COVERAGE

### Counterfeit & Illegal Brands

- Substitute/Refill
  - Distilled: Whisky, Vodka, Rum
  - Fermented: Beer, other fermented
- Industrial manufacturing of illegal/unbranded
  - Distilled: Whisky, Vodka, Rum
  - Fermented: Beer, other fermented

### Contraband

- Ethanol (as raw material)
- Finished product (illegal imports)
  - Distilled: Whisky, Vodka, Rum
  - Fermented: Beer, other fermented

### Illegal Artisanal Alcohol

- Distilled
- Fermented

### Surrogate

### Tax Leakage

## CND OBJECTIVES

1. Size the consumption of illegal alcoholic beverages in Dominican Republic, by type of illegal market, including tax leakage
2. Perform a qualitative analysis that describes the chain of production and sale of illegal drinks
3. Compare the size of the illegal market with the legal market

## EMI APPROACH

To address this need, Euromonitor collated information from secondary sources, visits to points of sales establishments, and in-depth trade interviews with key players. All findings were then triangulated to create a consensus output.

**PROJECT DETAILS****Category definitions**

	<b>Definition</b>
<b>Counterfeit &amp; illegal brands</b>	
Substitute/refill	Illegal alcohol sold as legal brands or empty bottles of legitimate products refilled with cheaper alcohol
Industrial manufacturing of illegal brands	Manufacturing of illegal branded or unbranded alcohol
<b>Contraband</b>	
Ethanol as raw material	Illegal imports of ethanol as a raw material
Finished products	Illegal imports of alcoholic beverages
<b>Illegal artisanal</b>	
	Illegal artisanal alcoholic beverages made for commercial purposes
<b>Surrogate</b>	
	Alcohol not meant for human consumption (e.g. pharmaceutical alcohol) diverted to the alcoholic beverages market
<b>Tax leakage</b>	
	Legal alcoholic beverages (locally produced) on which excise was not paid

## PROJECT DETAILS

## Research Methodology



## Secondary research

- Local analysts compiled published information including:
  - Official production and import data
  - News
  - Industry regulation
  - Legal market data from Passport and other sources



## Trade interviews

- 17 trade interviews were conducted with government organizations, associations, alcoholic beverage industry players (producers and distributors), and NGOs.



## Store checks

- 20 visits to points of sales were performed in order to observe beverage types, packaging, prices, brands, etc.



## Validation and analysis

- The measurement of the illegal alcohol market was performed by triangulating different sources of information, which resulted in different measuring approaches.



Introduction / **Executive Summary** / Market Analysis / Category Analysis / Recommendations / Appendix





## ILLEGAL MARKET SIZE

# Illegal alcohol market in numbers, 2016



**141,052**

Total illegal alcohol  
consumption in Volume  
HL LAE\*

**US\$548**

Total illegal alcohol  
consumption in Value  
Million USD

**US\$262**

Total fiscal loss  
Million USD

\*HL LAE: hectoliters of pure alcohol.



## KEY FINDINGS

# Illegal alcohol consumption remains a relevant issue

1

### Consumption of illegal alcohol has slightly decreased between 2015 - 2016

- In 2016, consumption of illegal alcohol decreased by 21,759 HL LAE, still represented 30.8% of total alcohol consumption in the country
- Even though consumption has decreased, it remains among the highest share across Latin America, as the regional average is 20.2%

2

### Improved coordination DGA – DGII from government

- Customs (DGA –*Dirección General de Aduanas*) and Tax Collection Agency (DGII –*Dirección General de Impuestos Internos*) began working more closely and in coordination in August 2016 and their joint efforts have started causing a positive impact in the illicit trade in general.

3

### Contraband remains the most important illegal alcohol type consumed

- Ethanol, smuggled from smaller Caribbean Islands, is used as ingredient for counterfeit beverages, especially illegal industrial manufactured.
- Contraband of ethanol as of final products, makes its way through customs, blind spots and the Haitian border, making it very hard to control.

4

### Illicit players and distributors are the main beneficiaries

- Consumers don't usually benefit from acquiring the illegal beverages, these are commonly sold at the same prices as the legal products to avoid suspicion, except in the case of "*tapa floja*" or loose tap.

## MAIN DRIVERS AND BARRIERS FOR ILLEGAL TRADE

### Increased awareness in general, due to more information available

#### Key drivers

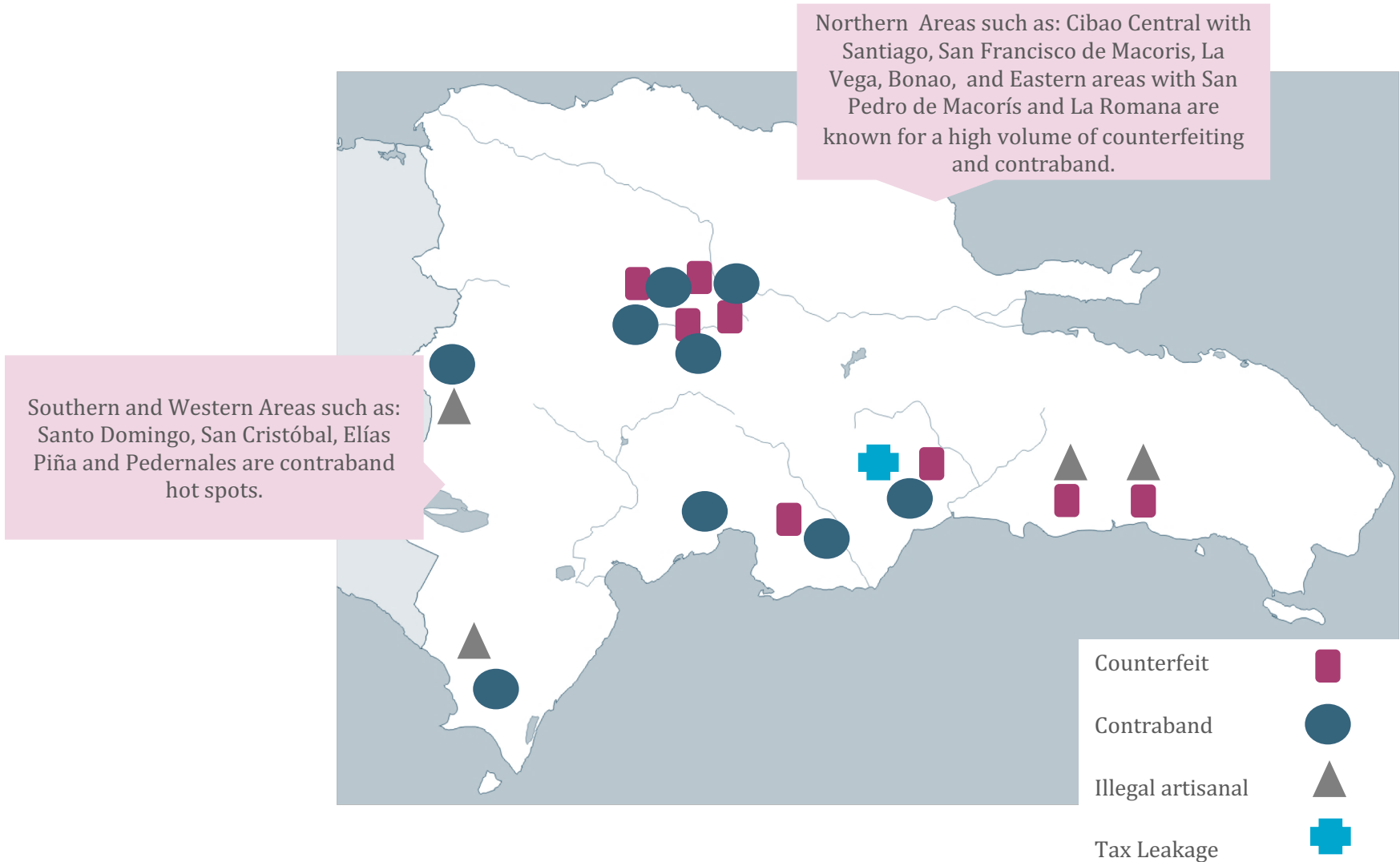
- **Limited control at customs** makes it easy for illegal importers to smuggle alcoholic drinks through official customs, by using misleading labels or camouflaging illegal products with others.
- **Weak enforcement of sanitary licenses**, allow for illicit products to be sold without major issues in formal retailing stores.
- **High profitable market**, making it an attractive activity throughout the supply chain, which is not comparable to the implied risk – “it is worth the risk taken”.
- **Excise taxes** (fixed and ad valorem), plus sales tax (ITBIS) represent roughly 40% of the final retail price, increasing profits for illicit players when these taxes are evaded.
- **Low consumer awareness** about illicit products available in the market and its negative effects in the industry and potential health risks.

#### Key barriers

- **Alliance between DGA and DGII** have started causing a positive impact in tackling illicit trade.
- **The Special Prosecutor’s Office Against Health Crimes** (*Procuraduría Especializada de Crímenes contra la Salud*) and the Presidential Table against Informality and Contraband (*Mesa Presidencial contra la Ilegalidad y el Contrabando*) are creating awareness on the dangers of consuming these illegal beverages and consumers are becoming more careful about the products they buy.
- **Stricter controls over import licenses** and temporary import regimes, implemented by the DGII, and the creation of specialized departments to provide more support, i.e. Tax Fraud Detection, and Planning and Tax Control.

## ILLEGAL ALCOHOL COVERAGE

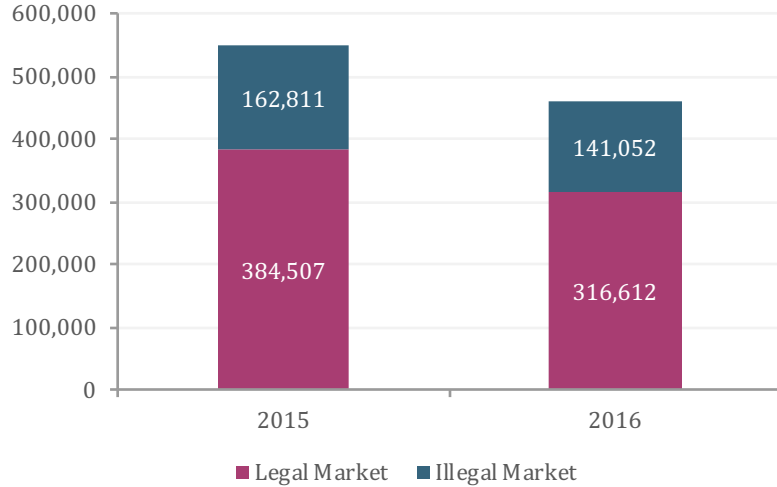
### Main regions where illegal alcohol is present



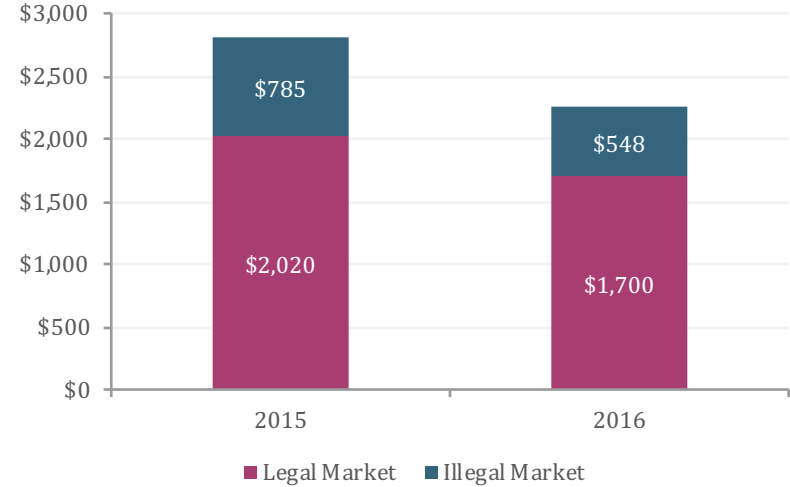
## ALCOHOL CONSUMPTION 2015 – 2016

# Overall consumption of illegal alcohol has decreased

Total Alcohol Market in Dominican Republic, Volume HL LAE



Total Alcohol Market in Dominican Republic, Value USD mn



Source: Euromonitor International

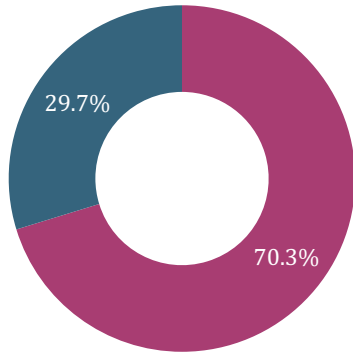
- In 2016, the total alcohol consumption was estimated in 457,664 HL LAE (US\$2,248 mn), 16.4% less compared to 547,318 HL LAE (US\$2,806 mn) in 2015. Both, legal and illegal alcohol were less consumed during 2016.
- Despite the growth figures reported for the economy of the Dominican Republic, growth in consumption of legal alcoholic drinks slowed in 2016 as higher prices, resulting from the tax burdens borne by alcoholic drinks, affected consumer demand.
- As some consumers curtailed their consumption of alcoholic drinks, many others have turned to lower-priced options, especially those offered in smaller pack sizes.



## ILLEGAL ALCOHOL SHARE 2015 - 2016

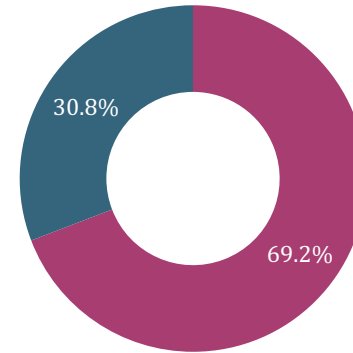
# Illegal alcohol market share slightly grew during 2015 - 2016

Total Alcohol Market in Dominican Republic 2015, Volume HL LAE



■ Legal Market ■ Illegal Market

Total Alcohol Market in Dominican Republic 2016, Volume HL LAE



■ Legal Market ■ Illegal Market

Source: Euromonitor International

- The share of illegal alcohol out of total consumption increased from 29.7% in 2015 to 30.8% in 2016, in despite of an overall decrease in consumption of illegal alcohol. This is mainly due to a reduction in the legal consumption of alcohol during the same period (from 384,507 HL LAE in 2015 to 316,612 HL LAE in 2016).
- In general, less alcoholic beverages (legal and illegal) were consumed in Dominican Republic; per capita consumption\* decreased from 8.2 liters of pure alcohol in 2015 to 6.8 in 2016 (-17.5%).

\*Per capita consumption was estimated based on total population aged 15-64 years.

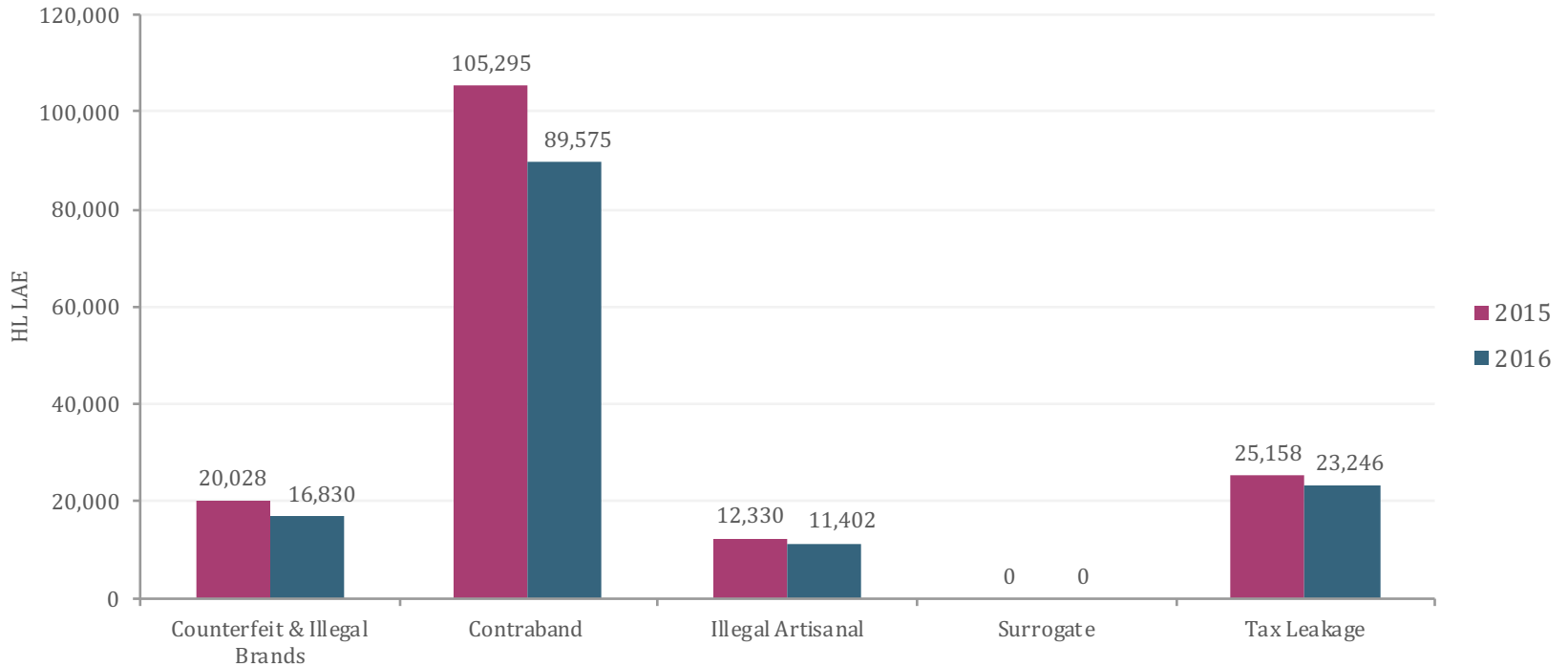


## ILLEGAL ALCOHOL CATEGORIES 2015 - 2016

# Contraband remains the main issue in the country

Consumption of all types of illegal alcohol decreased in the last year, nonetheless, contraband and tax leakage continue to lead the illegal consumption in the country and surrogate remains nonexistent.

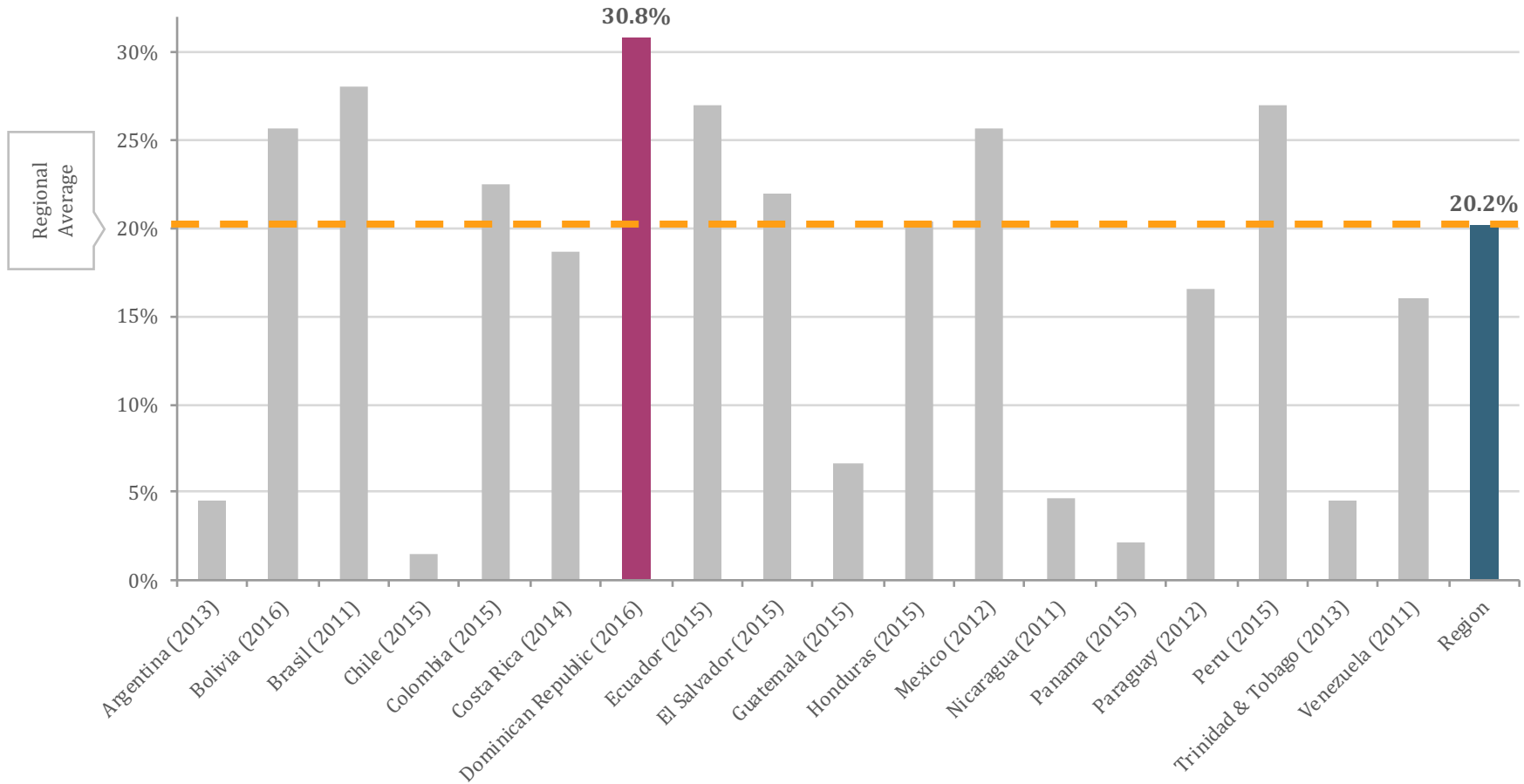
Illegal Alcohol Market in Dominican Republic 2015-2016, Volume HL LAE



## REGIONAL COMPARISON OF ILLEGAL ALCOHOL SHARE

# Dominican Republic is among the countries with higher consumption in the region

Illegal alcohol share out of total market, Volume HL LAE







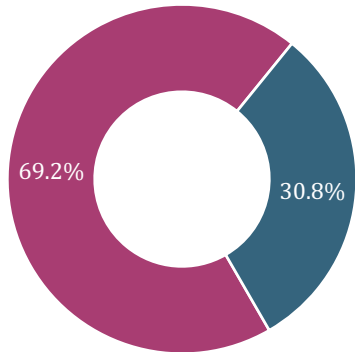
Introduction / Executive Summary / **Market Analysis** / Category Analysis / Recommendations / Appendix



## ALCOHOL CONSUMPTION IN VOLUME

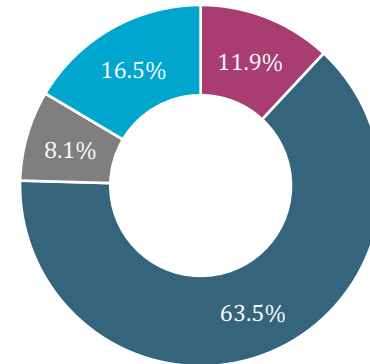
# Almost 1 out of 3 bottles of alcohol is illegal in Dominican Republic

Total Alcohol Market in Dominican Republic 2016, Volume HL LAE



■ Legal Market ■ Illegal Market

Illegal Alcohol Market in Dominican Republic 2016, Volume HL LAE



■ Counterfeit & Illegal Brands ■ Contraband  
 ■ Illegal Artisanal ■ Surrogate  
 ■ Tax Leakage

Source: Euromonitor International

- Illegal alcohol consumption was estimated in 141,052 HL LAE, from which +75% are contraband and counterfeit beverages.
- The main risk associated with illegal alcohol consumption is fiscal, due to the amount of taxes evaded and given that most beverages are original (contraband and tax leakage) thus the consumer health implications are lower.

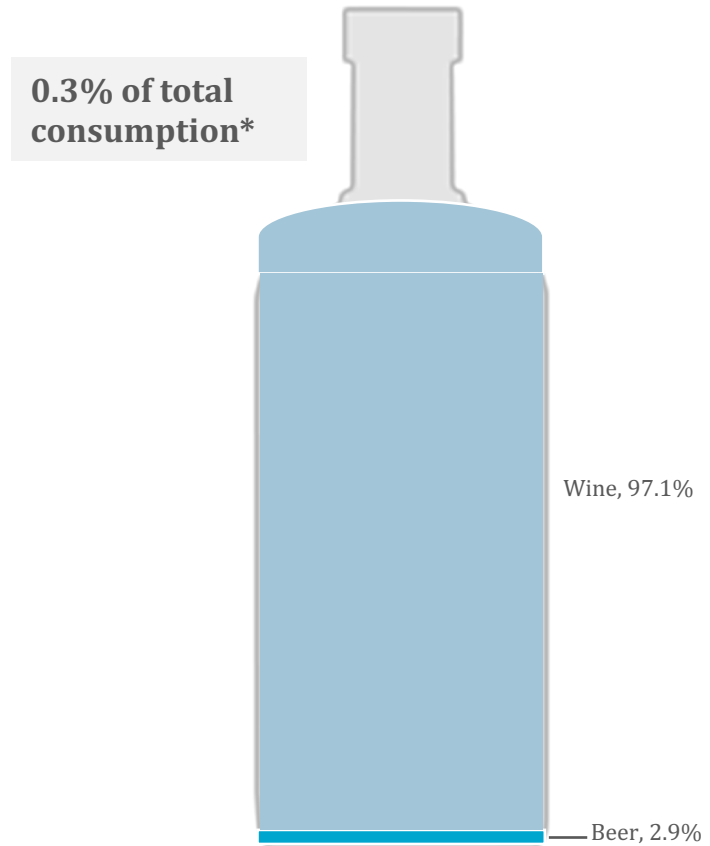
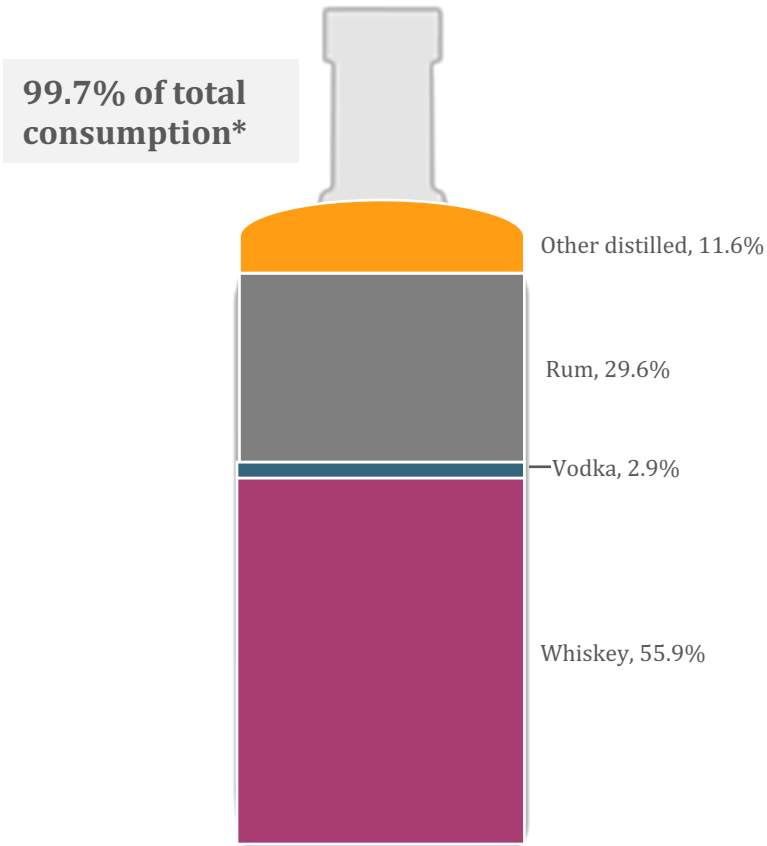


## ILLEGAL ALCOHOL BY TYPE OF DRINK

# Almost all illegal alcohol consumed is distilled, while beer is the least

Illegal Distilled Alcohol in Dominican Republic 2016, Volume HL LAE

Illegal Fermented Alcohol in Dominican Republic 2016, Volume HL LAE



Source: Euromonitor International.

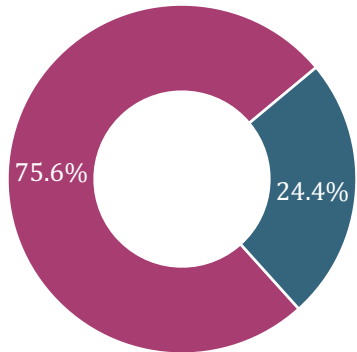
\*% based on total consumption of illegal alcohol excluding contraband of ethanol and tax leakage



## ALCOHOL CONSUMPTION IN VALUE

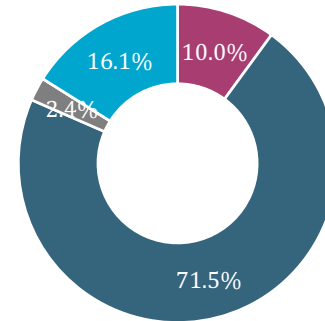
In value terms, the illegal market has less share due to lower prices per LAE

Total Alcohol Market in Dominican Republic 2016, Value USD mn



■ Legal Market ■ Illegal Market

Total Alcohol Market in Dominican Republic 2016, Value USD mn



■ Counterfeit & Illegal Brands ■ Contraband  
 ■ Illegal Artisanal ■ Surrogate  
 ■ Tax Leakage

Source: Euromonitor International

- Illegal alcohol consumption was estimated in US\$548 millions, representing 24.4% out of total consumption.
- Contraband brands, have higher share in value (71.5% compared to 63.5% in volume), as the selling prices are higher compared to other types of illegal alcoholic beverages, as most of them are premium, well-known brands of Whiskey and Rum.
- Contraband average price per bottle of 750ml is US\$16.5, compared to US\$9.7 for counterfeit and US\$4.9 for tax leakage.



## AVERAGE RETAIL PRICES

# Smuggled brands are the most expensive ones in the illegal market

Average retail prices per bottle of 750ml of illegal alcoholic beverages, 2016

Category	Retail price US\$
Total Counterfeit	\$9.7
Refilled Whiskey	\$19.0
Refilled Rum	\$8.6
Total Contraband	\$16.5
Contraband Whiskey	\$19.0
Contraband Vodka	\$12.0
Contraband Rum	\$8.6
Contraband Beer	\$2.0
Total Artisanal	\$3.9
Total Tax leakage	\$4.9

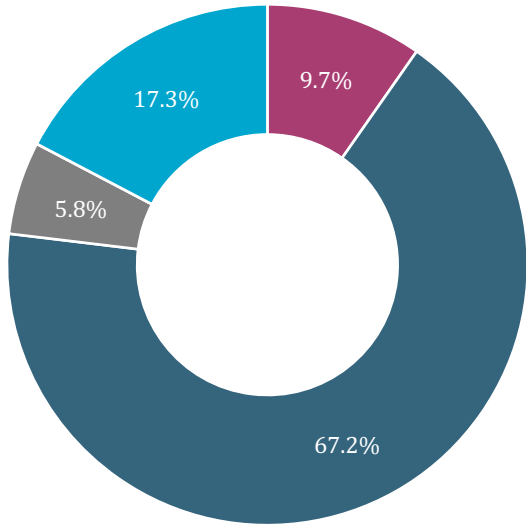
Source: Euromonitor International.

\*Prices based on sampling found during store visits and trade interviews

## FISCAL LOSS FIGURES

# Contraband is the largest burden in terms of fiscal loss

Total Fiscal Loss from Illegal Alcohol Market, 2016, USD mn



- Counterfeit & Illegal Brands
- Contraband
- Illegal Artisanal
- Surrogate
- Tax Leakage

- In 2016, total fiscal loss from illegal alcohol consumption was estimated in US\$262 mn, considering only excise taxes and import duties.
- Contraband represent the majority of the fiscal loss in the country, representing US\$176 mn, followed by Tax Leakage with US\$45 mn.
- According to industry sources, tax evasion is one of the main drivers behind illicit trade activities, as taxes represent around 40% of final selling price.
- In general, US\$18.6 are evaded per liter of pure alcohol.

“Taxes are a high cost element that can be considered as an incentive, since considering evading them is an attractive idea.”

*Industry Association*



Introduction / Executive Summary / Market Analysis / **Category Analysis** / Recommendations / Appendix



## CONTRABAND OVERVIEW

# Contraband is the largest type of illegal alcohol consumed

- **Who:** Premium finished products such as whisky (Johnnie Walker Black Label, Buchanan's, Chivas Regal, Old Parr, Black Stone and Chancellor) and ethanol as raw material.
- **Where:** Contraband enters the country through customs, blind spots and the Haitian border.
- It is most commonly found in the Santo Domingo area.
- Although many seizures have taken place as a result of the DGA and DGII's joint efforts, the authorities do not have the resources to check every container, so it is still an uphill battle.
- **How:** Containers are usually mislabeled and other products are used as camouflage.
- **Impact:** Revenue loss for public investment and social projects.

**89,575**  
Market size  
volume 2016 (HL LAE)

**64%**  
Market share in volume  
2016 (HL LAE)

**\$392**  
Market size  
Value 2016 (US\$ million)

**\$176**  
Fiscal loss 2016  
(US\$ million)

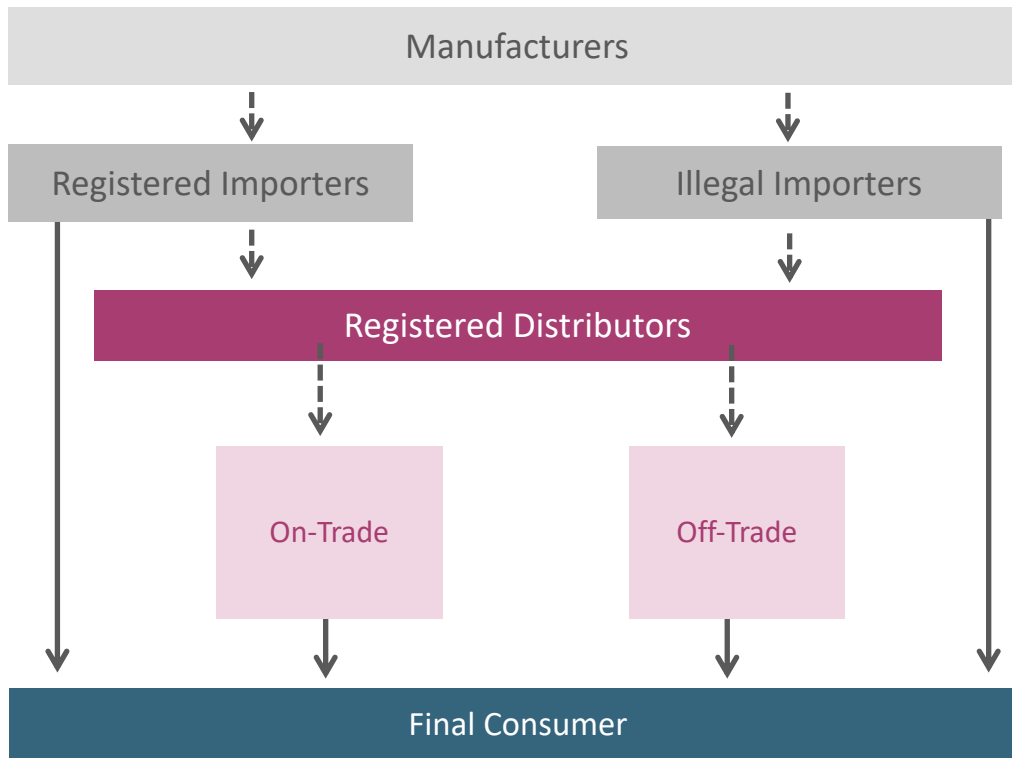




## CONTRABAND SUPPLY CHAIN

# Despite efforts, contraband products are still found in stores

### Overall supply chain structure



—— Direct distribution to end-users  
 ..... Indirect distribution

### Main findings

- Contraband makes its way into the country via blind spots, the Haitian border and customs.
- This is done by both, legally registered and unregistered importers who then sell the product to distributors at a discounted price.
- Distributors mix contraband with legal product and sell it as if it were all legal in order to avoid suspicion.
- The smuggled ethanol is mostly use for illegal production of alcoholic drinks.
- The final consumer does not usually benefit from this illegality as he/she pays full price for the beverages, except in some cases where distributors offer flash sales at discounted prices, but this is not the majority of times.

## CONTRABAND DRIVERS AND BARRIERS

# High profits pair with limited enforcement and control, continue driving contraband figures



Drivers

- The authorities' lack of resources to verify the contents of every container that comes through customs.
- Huge profits for the importer and distributor as they avoid taxation and later sell the product at the same legal price.
- Corruption at some ports and institutions due to the high economic incentives that the importers sometimes offer.

Barriers

- Joint efforts by DGA and DGII have made it more difficult for illegal imports to come through customs.
- The Special Prosecutor against Health Crimes has embraced the challenge and has made important seizures.
- Contraband products are easier to spot than counterfeit because they usually lack the importer/distributor's information.

**IN THEIR OWN WORDS**

“Contraband has strongly decreased in the past year, as authorities are doing more raids and more product is being confiscated...”

*Global Manufacturer - Importer*



## TAX LEAKAGE OVERVIEW

# Unrecorded sales of locally produced alcoholic beverages represent the second highest type

- **Who:** Legal manufacturers of alcoholic drinks that sell without paying all taxes.
- **Where:** Brands are sold in the same retail channels as the legal ones, as the only difference is the tax evasion implied.
- **How:** Manufacturers sometimes do not declare or declare smaller volumes, lower alcohol grades or lower prices to avoid taxation, and, distributors benefit from buying these products at lower prices and selling them at the same legal price.
- It is a fairly common practice and is sometimes even perceived as a “smart move” that generates savings.
- **Impact:** Revenue loss for public investment and social projects. Unfair competition among legal players.

# 23,246

Market size  
volume 2016 (HL LAE)

# 16%

Market share in volume  
2016 (HL LAE)

# \$88

Market size  
Value 2016 (US\$ million)

# \$45

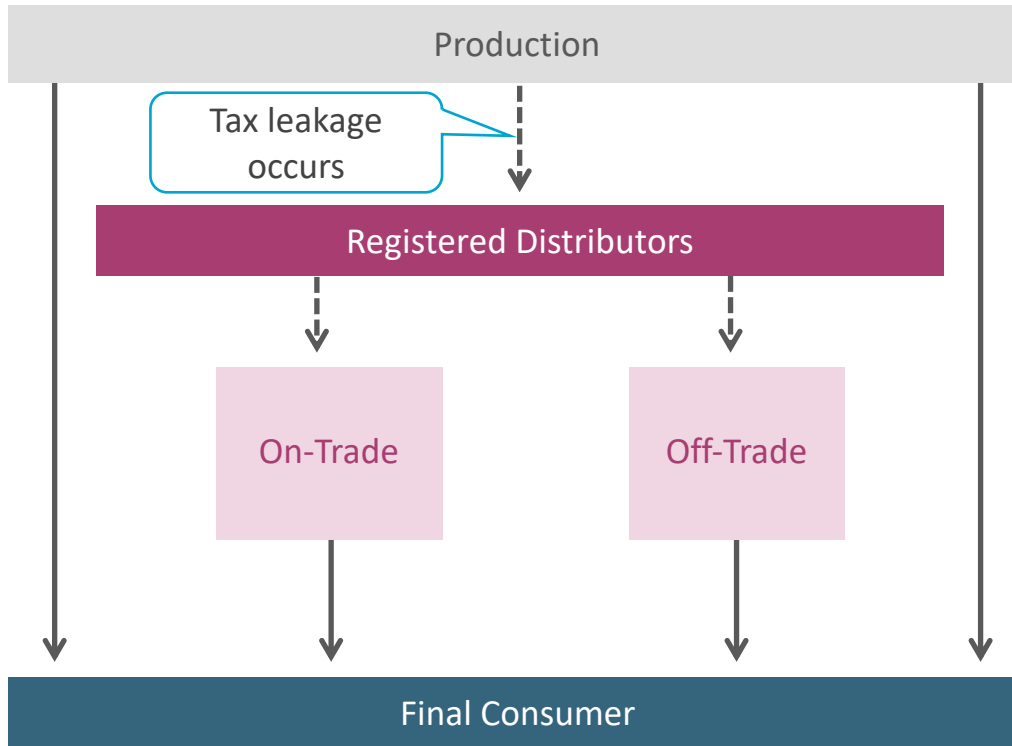
Fiscal loss 2016  
(US\$ million)



## TAX LEAKAGE SUPPLY CHAIN

### Both manufacturers and distributors benefit from tax leakage

#### Overall supply chain structure



#### Main findings

- Tax evasion takes place when manufacturers sell the product to the distributors, without paying proper taxes.
- Products are sold in the same channels, on-trade and off-trade, making it impossible to identify which ones are legal.
- Consumers are not aware that they are buying an illegal product, as brand, packaging and labelling are exactly the same.

## TAX LEAKAGE DRIVERS AND BARRIERS

# High excise among alcoholic beverages drives evasion



- High taxes; after the 2012 tax reform, taxes have been raised continuously. The country's taxes on alcoholic beverages are high in comparison to other countries.
  - It is considered a “victimless crime” because it does not directly harm consumers or other industry players, despite taking a large toll on the country's tax revenue.
  - Culturally, is it somewhat accepted to avoid taxation, it can be perceived as a “smart move”.
- 
- DGII and DGA's joint efforts have led to more strict controls and are perceived as a “*good start*” by industry players.
  - DGII enforces strict controls such as the use of “fiscal solutions” that track products, receipts, and contributor numbers (RNC) from the moment they leave DGII-approved storage facilities and enter the commercial market.
  - Producers, importers, distributors and on/off-trade channels must all keep a record so that the product can be tracked from production/import until it reaches the final consumer. Producers must report to DGII when their product is ready to be sold so the special locks (monitored by DGII) can be opened as well.

**IN THEIR OWN WORDS**

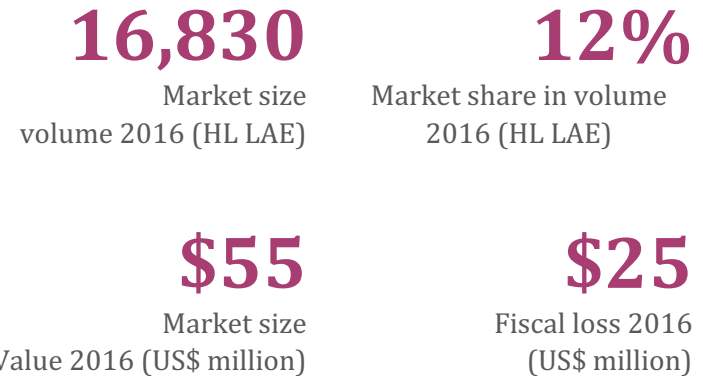
“There are many local manufacturers of alcoholic drinks that pay their taxes, but there is a percentage that evades them, and for that we are monitoring the entire alcohol sector...”

*DGII*

## COUNTERFEIT OVERVIEW

# Counterfeit is the third largest type of illegal alcohol consumed

- Who:** Almost all of counterfeit beverages are distilled, rum is a very popular drink and the most common in this category. Fermented beverages such as beer and wine are very rarely affected.
- Mostly affects creole rums such as: Peter Allen, Don Ron, Dominican Rum as Barceló Añejo, Carta Real and Brugal Blanco.
- Where:** Santiago de los Caballeros, near the Cibao region is the epicenter for counterfeit production. This occurs in industrial production areas and sometimes rural areas as well.
- How:** These products are sold at the same price and usually in original bottles that have been refilled, with the exception of “*tapa floja*”, these are openly offered at a slightly lower price. Sometimes, the consumer knows the products are fake, but still buys them for aspirational reasons.
- Impact:** Health concerns are high as there is no control over these products that many Dominicans are consuming.

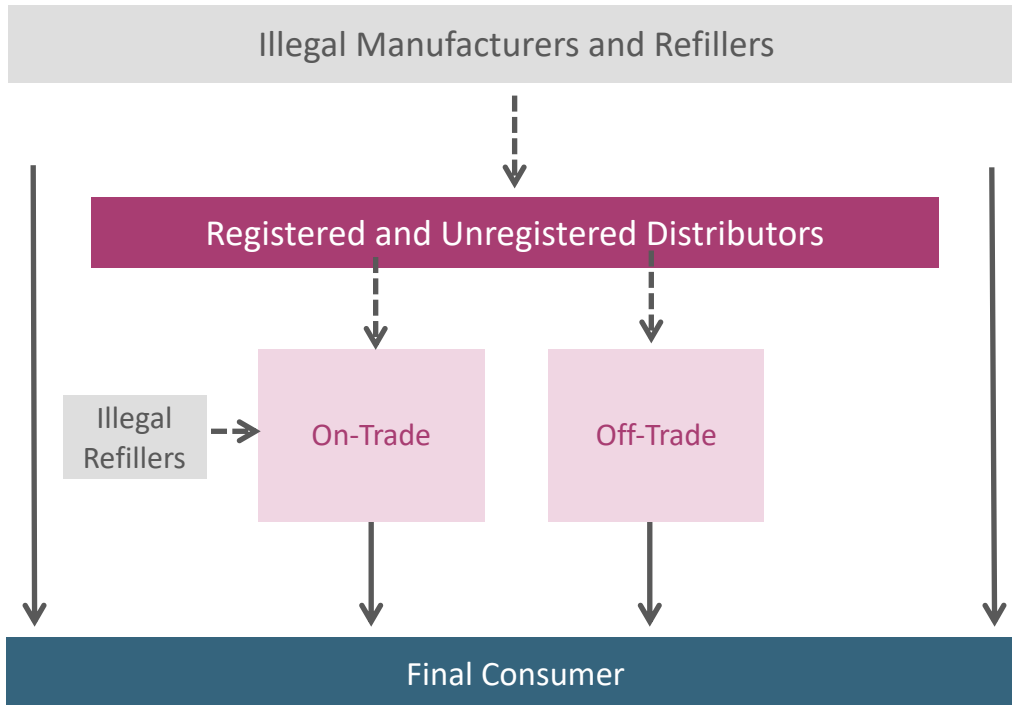




## COUNTERFEIT SUPPLY CHAIN

# Most consumption happens on-trade

### Overall supply chain structure



— Direct distribution to end-users

- - - Indirect distribution

### Main findings

- Refill is the most common form of counterfeiting, it represents 92% of the category and usually takes place in bars, restaurants and sometimes hotels.
- Industrial illegal manufacturing also exists, but only represents 8% of this category.
- Consumers are almost always unaware that they are purchasing refilled beverages.
- Loose cap or “*Tapa floja*” products are also available and frequently sold at a lower price. Consumers can find these bottles in *colmados* and are well aware of the illegality, the lower price is their incentive.

## COUNTERFEIT DRIVERS AND BARRIERS

### Counterfeit: Drivers vs. Barriers



- As large amounts of illegal ethanol, a key ingredient for alcoholic beverage production, are available in the market, manufacturers can easily set up illicit production.
  - Easy access to empty bottles that can be purchased at bars, restaurants or directly from individual gatherers that live in rural areas to be refilled later.
  - Lack of or very little control at on-trade locations makes refilling bottles fairly easy, as unsuspecting consumers purchase what they consider to be a legal product.
- 
- Growing awareness has made consumers become more demanding and cautious, making them harder to fool.
  - The Special Prosecutor Against Health Crimes has been working arduously closing illegal factories, seizing raw materials, finished product as well as equipment and distribution vehicles.
  - Key industry players have become more vigilant and are striving to ensure high standards are met during rum production.



**IN THEIR OWN WORDS**

“Illegal ethanol use for counterfeit, is imported in two ways: In customs declaration, total volume is under declared or legal imports are falsely exported and re imported to the country...”

*Ethanol producer*



## ILLEGAL ARTISANAL OVERVIEW

# Artisanal alcoholic beverages are mostly produced and consumed in rural areas

- **Who:** Artisanal beverages are commonly sold unbranded in plain plastic bottles.
- The most popular is a distilled sugarcane-based drink called “clerén”, it is also known as “pitrinchi” or “tricoli”.
- **Where:** Clerén is sometimes found in *colmados*, but is also sold directly in homes where production takes place.
- Rural and poor areas are more vulnerable to artisanal beverage consumption due to its low price.
- **How:** Artisanal drinks are home prepared, in small alembics, without any proper quality and sanitary controls.
- **Impact:** These artisanal beverages pose an enormous health risk as they do not abide by any regulation or follow any production norms.

# 11,402

Market size  
volume 2016 (HL LAE)

# 8%

Market share in volume  
2016 (HL LAE)

# \$13

Market size  
Value 2016 (US\$ million)

# \$15

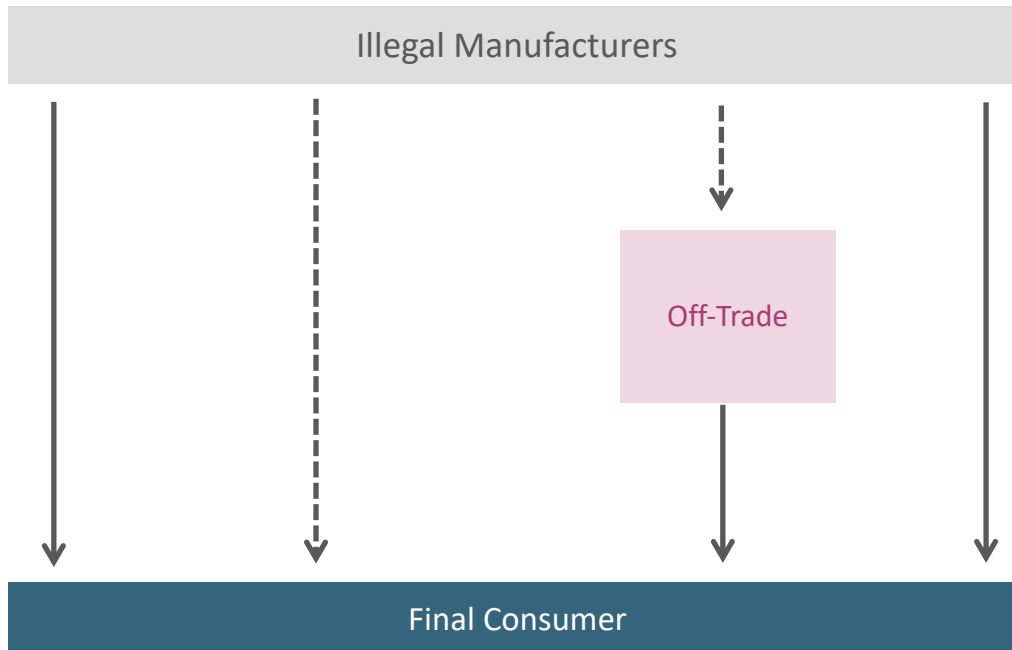
Fiscal loss 2016  
(US\$ million)



## ILLEGAL ARTISANAL SUPPLY CHAIN

# Consumers tend to be low income, uneducated and frequently alcoholics

### Overall supply chain structure



—— Direct distribution to end-users

- - - - Indirect distribution

### Main findings

- All artisanal alcoholic beverage produced in the Dominican Republic is illegal.
- *Clerén* is commonly produced in small alembics in rural homes.
- Manufacturers can sell their product to *colmados* that serve as their distributors or they can sell it directly to consumers right outside their homes.
- Despite having the least impact in terms of volume and value, this category poses the greatest health risk for consumers due to the lack of control over production.

## ILLEGAL ARTISANAL DRIVERS AND BARRIERS

### Consumption of *Cleren* is widely accepted



- Vulnerable population in rural poor areas as a result of the product's low price and availability.
  - Authorities are more focused on combating other types of illegalities that have bigger economic impact.
  - Alcoholism. Need-driven and uneducated consumers will forgo the health risks in order to satisfy their urges.
- 
- Growing awareness about the potential health risks among slightly more educated consumers.
  - Illegal alembics shutdowns and equipment seizures performed by the Special Prosecutor Against Health Crimes.

**IN THEIR OWN WORDS**

“Given the high alcohol content of *Cleren*, it should be considered as a toxic drink and have more attention from the authorities”.

NGO







## ACTIONS TO TAKE

# Joint efforts between public and private sector are required

1

### Awareness campaigns

- Public and private partnerships are needed to design and execute awareness campaigns oriented to inform consumers of the health risks associated with the illegal alcohol consumptions. Also, consumers should learn about how to identify illegal products to avoid their purchase.

2

### Improved enforcement

- Is mandatory to improve rule of law, as regulation exists but it is not always enforced by authorities.
- Stronger sanctions are required for crimes related to illicit trade in general, including contraband, but also illegal production and sale of alcoholic drinks.

3

### Expedite sanitary licenses

- Overall delays in the sanitary license processes, allow for legal and illegal alcoholic beverages to be sold in the country without proper registration and control. An expedite process would allow retailers and consumers to easily identify illegal products, therefore consumption would be reduced.

4

### Promote a fiscal culture

- As evading taxes is not perceived as an illegal activity but as a “smart move”, authorities should promote a fiscal culture, not only with improved controls, but also with better transparency about how taxes are invested in social projects.



**KEY CONTACTS****In-depth interviews conducted**

No.	Company or Organization Name
1	Procuraduría Especializada de Crímenes contra la Salud
2	Dirección General de Impuestos Internos, Departamento de Alkoholes y Tabacos
3	Asociación Dominicana de Productores de Ron (ADOPRON)
4	Asociación de Hoteles y Turismo de República Dominicana (ASONAHORES)
5	Licormart
6	Ron Matusalén
7	Grupo Ramos
8	DIAGEO
9	Asociación de Industrias de la Republica Dominicana (AIRD)
10	Alkoholes Finos Dominicanos
11	Consejo Nacional de Zonas Francas (CNZF)
12	Alcohólicos Anónimos
13	Ministerio de Salud Pública (MISPAS)
14	Ministerio de Industria y Comercio (MIC)
15	United Brands
16	Ron Barceló
17	Cervecería Nacional Dominicana (CND)



**Lourdes Chavarria**

Senior Consulting Manager

[lourdes.chavarria@euromonitor.com](mailto:lourdes.chavarria@euromonitor.com)

**Daniela Mizumoto**

Business Development – Consulting

[Daniela.mizumoto@euromonitor.com](mailto:Daniela.mizumoto@euromonitor.com)

**Flavia Callafange**

Senior Client Development

[Flavia.callafange@euromonitor.com](mailto:Flavia.callafange@euromonitor.com)

