Required Report: Required - Public Distribution **Date:** December 17, 2025

Report Number: CS2025-0033

Report Name: Citrus Annual

Country: Costa Rica

Post: San Jose

Report Category: Citrus

Prepared By: Victor Gonzalez

Approved By: Zeke Bryant

Report Highlights:

Costa Rica's production of oranges declined more than expected in marketing year (MY) 2024/25, to the lowest production level since MY 2014/15. Although production was expected to grow, unusually excessive rainfall towards the end of 2024 and the beginning of 2025 resulted in large production losses. FAS San José expects orange production to increase approximately 10 percent in MY 2025/26 based on better weather conditions during 2025.

ORANGES

Area Planted

The Costa Rican government has not published area planted and production data for oranges since 2023. Based on limited industry information and news related to higher incidence of citrus greening throughout the country, FAS San José estimates that area planted has declined to 20,000 hectares (ha). The two major growers are expected to continue improving current area primarily through replanting of older existing areas. Industry sources estimate the total number of orange trees at 7.5 million.

Table 1. Costa Rican Orange Production

	2023/24	2024/25*	2025/26*
Area (ha)	21,000	20,000	20,000
Production (MT)	225,000	200,000	220,000
Yield (MT/ha)	10.7	10.0	11.0

Source: Costa Rican Ministry of Agriculture and Livestock
**FAS estimate based on industry information*

Commercial orange production is concentrated in the northern part of Alajuela province (around Los Chiles, Guatuso, and Upala) and in the northern part of Guanacaste province (near the border with Nicaragua in an area known as Santa Cecilia).

Two companies, TicoFrut and Del Oro, control most of the production and practically all processing of oranges in the country. TicoFrut is the largest company in the sector. TicoFrut's plantations are located in the province of Alajuela (near the border with Nicaragua) as well as across the border in Nicaragua. Oranges from the Nicaraguan plantations are trucked across the border in Los Chiles for processing at TicoFrut's plant located in Muelle, San Carlos, about 50 miles south of the border. Del Oro's plantations are in Santa Cecilia, Guanacaste (also near the border with Nicaragua). Smaller, independent growers in other regions of the country – including Acosta (near the Central Valley) and Nandayure in Guanacaste – mostly sell to the local fresh market and many of these plantations have been abandoned or dedicated to other production activities.

There are some medium and small-sized independent producers in the vicinity of the TicoFrut and Del Oro processing plants. Smaller independent producers predominantly sell into the domestic fresh fruit market, diverting oranges to the processing market in response to short-term price fluctuations. Smaller producers have been exiting orange production altogether as citrus greening disease (present in Costa Rica since 2011) has spread throughout the country, resulting in higher costs of production, lower yields, and lower (or negative) profits.

Oranges are harvested mainly from January to May, with peak production volume in March and April.

Figure 1. Map of Costa Rican Growing Areas (circled in blue)

Source: Industry Contacts.

Production

After an 11 percent fall in production in marketing year (MY) 2024/2025, FAS San José forecasts total production to increase 10 percent in MY 2025/26 to 220,000 metric tons (MT) on better weather conditions during 2025 in the main production areas. According to industry sources, abnormal weather patterns affected production during the last two marketing years. The effect of El Niño resulted in much lower rainfall during 2023 in the northern production regions bordering with Nicaragua. In 2024, excessive rains at different times of the year, in particular at the end of the year and the beginning of 2025, resulted in the lowest production level on record since 2014/2015. According to local industry, the lack of extreme weather patterns in 2025 is expected to result in higher production during marketing year 2025/2026.

Industry sources anticipate continued difficulties in attracting sufficient workers during the harvest period, which has become a recurring problem for different agricultural activities in the country. Labor availability was less of a factor in MY 2024/25 because of the smaller-than-expected crop. Production costs (primarily fuel and fertilizer) have declined compared to previous years, however the high cost of agrochemicals and the limited availability of molecules to fight citrus greening continue to challenge growers.

Citrus greening was first identified in Costa Rica in 2011 and remains a major concern for producers. The disease is now endemic throughout the country's growing areas, increasing costs, decreasing yields, adding uncertainty to future production plans, and limiting production area expansion. The largest farms have been relatively successful in mitigating the effects of the disease by establishing strict controls, including constant farm surveillance and eradication of affected plants. Better capitalized producers use agrochemicals and biological controls (a wasp, *tamarixia radiata,* that feeds on the Asian citrus psyllid) in their preventive measures.

According to industry sources, many small-or medium-size growers whose plantations have been affected by the disease have left orange production given the high cost of controlling the disease. For instance, in areas near the border with Nicaragua, some areas that were previously planted to oranges have shifted to pineapple or sugarcane production. Ministry of Agriculture officials have indicated that the situation is critical for many of the remaining small producers in the country. Smaller producers, less capable of investing in agrochemicals and biological controls, have reportedly suffered heavier losses. According to Costa Rican government sources, some producers have been less vigilant in eradicating infected trees, contributing to the spread of the disease.

Figure 2: Newly re-planted orange groves near Los Chiles (August 2025)

Within area planted to oranges, farmers have gradually increased the number of trees per hectare by using the "Flying Dragon" pattern, which supports higher tree density, easier farm management, and lower production costs per hectare. This innovation has allowed farmers to significantly increase tree density, moving from 300-450 trees/ha under traditional planting patterns to 800-900 trees/ha with the Flying Dragon. Major growers are expected to continue directing investments toward replanting existing areas with new trees and new patterns, rather than increasing area planted. Industry sources expect the pattern renovation process to continue through the early 2030s, gradually driving yields higher over time. In August of this year, FAS San José visited production areas where replanting was underway.

Trade

Calendar year (CY) imports of fresh oranges from Nicaragua reached 53,704 MT through September 2025, four percent higher than the same period in CY 2024. Costa Rica imported a total of 56,448 MT of fresh oranges from Nicaragua in CY 2024, a 13 percent increase over 2023. Imports of fresh oranges for processing have fluctuated in the past based on crop and weather conditions rather than changes in area planted, which have remained stable. Growing conditions are favorable in Nicaraguan areas bordering Costa Rican orange production area, and land prices and labor costs are substantially lower on the Nicaraguan side of the border.

Table 2. Costa Rica Imports of Fresh Oranges (MT)

Country	2022	2023	2024
Nicaragua	58,825	49,882	56,448
Others	1,558	1,567	1,922
Total	60,383	51,449	58,370

Source: Trade Data Monitor Inc. (TDM)

FAS San José expects total orange juice exports (including both single strength and frozen concentrated orange juice) to increase to 20,000 MT in MY 2025/26, as a result of higher expected production. According to TDM, total orange juice exports to all destinations in CY 2024 were 21,436 MT (valued at $68.1 million), down 39 percent in volume and up 7.6 percent in value from 35,409 MT (valued at $63.3 million). Higher orange juice prices partially mitigated the sharp decline in export volume during 2024. Calendar year trade data through October 2025 from the Costa Rican Customs Department show total exports reached 13,441 MT (valued at $43.7), down 36 percent in volume and 1.4 percent in value over the same period in CY 2024, with higher juice prices mitigating the sharp drop in export volume.

Costa Rican exporters of agricultural commodities in general have expressed great concern about the financial effects of the appreciation of the Costa Rican colon against the U.S. dollar. The colon has appreciated almost 30 percent over the last three years, affecting the competitiveness of exporters who receive payments in dollars and pay most of their costs (labor, taxes, utilities, inputs, etc.) in Costa Rican colones. According to industry sources, the higher price of orange juice and its by-products does not compensate for the reduction in export revenues caused by local currency appreciation.

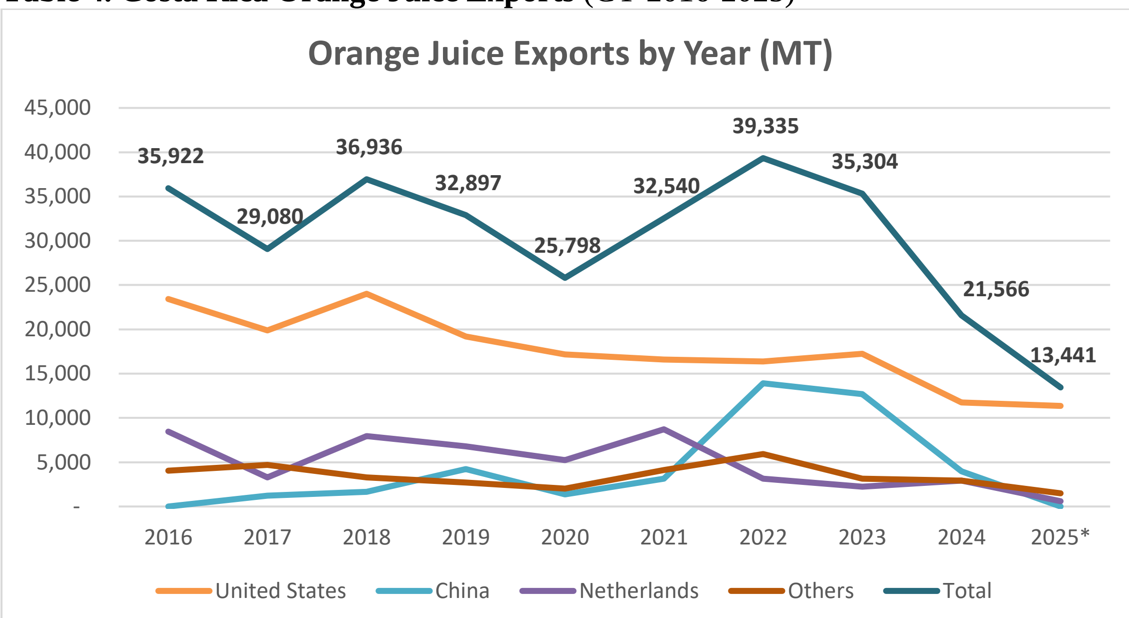
The United States continued to be Costa Rica's leading destination for orange juice exports in CY 2025. Total orange juice exports to the United States through September 2025 were 7,576 MT, 38 percent lower in volume and 54 percent lower in value from the same period in CY 2024. Orange juice exports to China have been zero in 2025 from 3,713 MT and $5.3 million between January-September 2024. Exports to the Netherlands, which traditionally has been an important market for Costa Rican orange juice, also declined sharply (around 80 percent in volume and value) as a result of the overall decline in production and exports.

Table 3. Annual Costa Rica Orange Juice Exports (CY 2024)

Country	Volume (MT)	Value (thousand USD)
United States	12,201	51,966
China	3,713	5,278
Netherlands	2,735	2,678
Panama	932	1,833
Israel	576	464
Others	1,271	5,907
Total	**21,436**	**68,125**

Source: Trade Data Monitor Inc. (TDM)

Table 4. Costa Rica Orange Juice Exports (CY 2016-2025)



Source: Costa Rican Customs Department
**2025 data is for January-October*

Costa Rica exports most of its orange production as frozen concentrated orange juice (FCOJ). The volume of single-strength fresh orange juice exports has declined in recent years and now represents about 10 percent of total export volume.

Attachments:

No Attachments