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Report Highlights:

This report provides economic, market, and regulatory analysis for U.S. exporters looking to do business in Costa Rica, highlighting trends and offering a practical overview of the local market. For 2026, FAS San Jose expects Costa Rica to remain a promising market for U.S. agricultural products, with an export value of \$962 million in 2024.

Market Fact Sheet: COSTA RICA

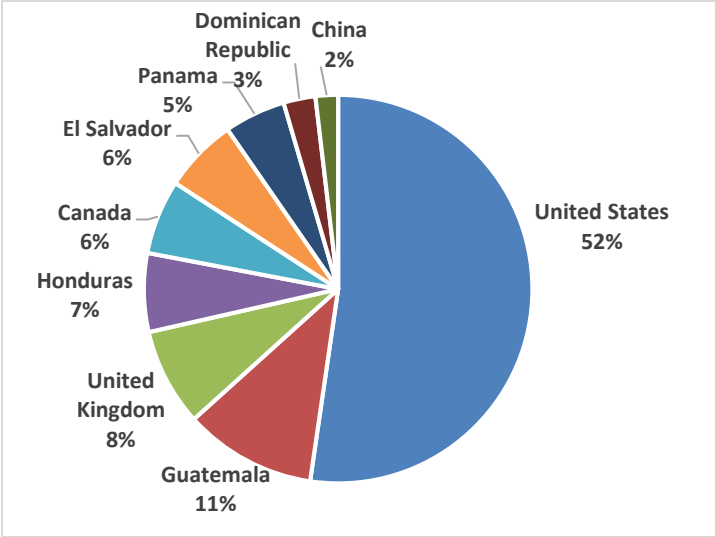
Executive Summary

On July 1, 2025, the World Bank upgraded Costa Rica from the “upper-middle-income” to the “high-income” classification based on its 2024 Gross National Income (GNI) per capita. Costa Rica’s Gross Domestic Product reached \$95 billion in 2024. The United States is Costa Rica’s largest trading partner and foreign direct investor. Costa Rican consumers trust and enjoy U.S. food and beverage products, which have grown by 90 percent in export value since the 2009 entry into force of the Dominican Republic - Central America Free Trade Agreement (CAFTA-DR). Proximity to the United States is a major logistics advantage and for U.S. exporters’ ability to develop and service customer relationships. Agriculture remains modest but is a key export driver especially for pineapples, bananas, and coffee. Costa Rica ranked 29th among U.S. agricultural export markets in 2024, with U.S. agricultural and related product exports to Costa Rica reaching \$962 million.

Consumer-Oriented Product Imports

Strong prospects for U.S. consumer-oriented products – dairy, beef, pork, poultry, bakery goods, condiments, sauces, cereals, and pasta – helped push U.S. consumer-oriented exports up 10 percent to a record high \$506 million in 2024. U.S. pork exports reached \$70 million in 2024, up 59 percent. U.S. dairy exports also grew significantly, up 40 percent to \$60 million.

2024 Consumer-Oriented Product Imports (by value)



Source: Trade Data Monitor, LLC

Food Processing Industry

Most Costa Rican food processors import ingredients directly from exporters. Processors have their own distribution channels to wholesalers, distributors, and retailers, as well as hotels, restaurants, and institutional buyers nationwide. Distribution

channels for local and imported products can differ and change frequently.

Retail Sector

Costa Rica’s retail sector consists of supermarkets, hypermarkets, mini-marts, warehouse stores, and approximately 22,000 mom-and-pop shops. Consumers are price sensitive, and the popularity of bulk formats continues to grow. Chinese grocery stores are increasing in number and in appeal to price-conscious consumers, especially outside the San José metropolitan area. E-commerce sales growth reflects deeper consumer trust in online channels.

Costa Rica Quick Facts 2025

Imports of Agricultural products \$1.032 million

List of Top 10 Growth Products

- | | |
|-----------------|--------------------------------------|
| 1) Pulses | 2) Distillers Grains |
| 3) Soybean Meal | 4) Poultry Meat |
| 5) Beer | 6) Dairy Products |
| 7) Pork Meat | 8) Processed Vegetables |
| 9) Seafood | 10) Bakery Goods, Cereals, and Pasta |

Top 10 Retailers

- | | |
|------------------------|-----------------|
| 1) Walmart - Pali | 2) Automercado |
| 3) Pequeño Mundo | 4) Perimercados |
| 5) PriceSmart | 6) Mega Super |
| 7) Fresh Market | 8) Super Compro |
| 9) Mayca Retail Stores | 10) Saretto |

Population / GDP 2025

Unemployment	6 percent
Population	5.2 million
GDP (billions USD)	\$87
GDP (per capita)	\$14,733
Exchange rate	498 Colones : \$1 USD

Sources: Central Bank of Costa Rica and INEC

Strengths / Weaknesses / Opportunities / Challenges

Strengths	Weaknesses
U.S. products are well-known and perceived as high quality.	U.S. products are often undercut by regional competitors on price.
U.S. geographic proximity provides logistical advantages for marketing and trade.	English language labeling and marketing materials.
Opportunities	Challenges

Costa Rican consumers are becoming more sophisticated in their food preferences.	Buyers have stronger cultural ties to European and Central or South American suppliers.
Chefs are looking to introduce new trendy foods and are open to new concepts.	Costa Rica has many levels of bureaucracy that can slow the importation of food products.

Source: FAS/San José – AgSanJose@usda.gov

SECTION I. MARKET OVERVIEW

The United States is considered Costa Rica’s largest trading partner, with significant opportunities for U.S. exporters to supply the food industry. On July 1, 2025, the World Bank upgraded Costa Rica from the “upper-middle-income” to the “high-income” classification based on its 2024 Gross National Income (GNI) per capita. Steady economic growth over the last 30 years has been driven by an outward-oriented strategy, based on foreign investment and trade liberalization. Costa Rica has a well-educated labor force, close geographic proximity to the United States, and attractive free trade zone incentives appealing to multinational corporations.

Nearly 36 percent of all agricultural imports are of U.S. origin, almost all of which have preferential access under the Dominican Republic-Central America Free Trade Agreement. Costa Rica does not produce significant quantities of bulk commodities. Production of rice and black beans, both dietary staples, has declined in recent years and large volumes of those crops are imported to meet domestic demand. Costa Rica also relies on imports to satisfy 100 percent of the consumption of wheat, yellow corn, and soybeans, which are crushed locally to support the chicken, pork, and dairy industries.

Costa Rica’s population of 5.2 million is spread across approximately 1.8 million households. More than 70 percent of Costa Rica’s population resides in the central valley, where the capital San José is located. This area, known locally as the “GAM” or the Greater Metropolitan Area, represents a substantial concentration of population, wealth, and economic activity. Tourism remains a strong component of Costa Rica’s economy, but international arrivals are down 2.2 percent through September 2025. Approximately 160,000 U.S. citizens reside in Costa Rica and a record 1.6 million U.S. citizens visited in 2024, further driving demand for U.S. food and beverage products.

Table 1. Costa Rica Market Overview Summary

Advantages	Disadvantages
U.S. geographic proximity provides logistical advantages for marketing and trade.	Products from the U.S. West Coast and Upper-Midwest face higher transportation costs relative to Central American suppliers.
U.S. exporters can supply different volumes according to local demand and are viewed as reliable suppliers.	Low-volume shipments of high-value products face additional costs since they must go through freight consolidators in Miami or other ports.
The food processing industry requires a wide range of ingredients as well as high-value consumer-oriented and processed foods.	Increasing competition in the food processing sector from Central and South America.
CAFTA-DR provides duty-free access for all products other than fresh potatoes and onions.	Lengthy and bureaucratic registration processes for some products deter exporters from entering the market. More information is available in this report .
U.S. food products are competitive in terms of price and quality.	Recent tariff cuts on all rice imports reduced competitiveness of U.S. rice.

Costa Rica has an on-line product registration system, which has reduced registration times for new imported products.	Slow and cumbersome bureaucracy poses a challenge to doing business in the country.
Costa Rica recognizes the equivalence of the U.S. meat and poultry inspection systems, eliminating the need for approval of individual plants.	Costa Rica requires facility registration for seafood, lamb, and egg products. The plant approval process generally takes several months.
A strong tourism sector (domestic and international) creates opportunities for U.S. bulk-formatted items destined for food service.	Relatively high prices compared to regional tourist destinations and domestic transportation challenges.
Costa Rica is not self-sufficient in commodities, depending on imported grains and legumes.	South American grains compete aggressively with U.S. grains on price and quality.
Costa Rica generally supports science-based international standards.	Trade agreements with regional countries increase competition within certain categories, like dried beans, meats, fresh fruit, and processed foods.
Costa Ricans are beginning to consume higher quantities of frozen and prepared foods.	Regional suppliers of prepared foods are price competitive and attuned to local flavor profiles.

SECTION II. EXPORTER BUSINESS TIPS

The Costa Rican market offers good opportunities for U.S. exporters of consumer-oriented agricultural products. Negotiations in Costa Rica tend to proceed at a slower pace than those in the United States. Below are some important characteristics that should be noted:

Market Access

FAS San José recommends the following steps when entering the Costa Rican market:

1. Do your homework – investigate import requirements and comparable product availability/pricing.
2. Identify a reliable importer/distributor, knowledgeable in your product category and of Costa Rican regulations and import procedures.
3. Consider whether participating in a trade show (including virtual) or participating in USDA or SRTG-funded promotional activities could assist in finding a dependable import partner.

Other important elements to consider while doing business in Costa Rica are:

- A personalized approach to business, with consistent attention to service and delivery, frequent visits, and follow-ups, is important in Costa Rica.
- Navigation of Costa Rica's import procedures can be tricky. It is best to work with experienced representatives, agents, and importers; there are many in the country.

- Costa Rican law provides two main forms of representation: a representative and a distributor. The representative can also be considered an agent. It is possible for one person to be both a representative and an agent or a distributor at the same time.
- Once a potential representative is identified, the next step is to negotiate an agreement. The content of this agreement will determine the legal basis for any relationship between the exporter and the representative. Engaging a qualified, local lawyer is strongly advised.
- Once a partner has been selected, the U.S. firm should obtain business and/or credit reports on the Costa Rican company, as part of the U.S. firm's due diligence.
- Contracts should be written and reflect agreements made by top decision-makers in each firm.
- Marketing funds and flexibility in purchase order volumes can help close a business contract.
- Credit terms: 3 to 4 months can pass between the time the importer places an order with an exporter to the time they collect payment from retailers.
- Trademark registration and protection are important.
- Printed materials should be in Spanish, although most Costa Ricans in the business sector are bilingual.

In addition, the U.S. Department of Agriculture's Foreign Agricultural Service (FAS) provides trade services at no cost to U.S. companies interested in exporting agricultural, fishery, and forestry products. FAS works with other USDA agencies as well as the Food and Drug Administration (FDA) to coordinate the U.S. Government response to sanitary, phytosanitary, and technical barriers to trade, including challenges posed by new procedures introduced at ports or acquiring, translating, and coordinating the U.S. Government response to draft regulations that could affect U.S. exports.

SECTION III. IMPORT FOOD STANDARDS & REGULATIONS

U.S. exporters should consult the latest FAS San José Food and Agricultural Import Regulations and Standards (FAIRS) report (available [here](#)) to better understand the regulatory requirements applicable to their product. Key Costa Rican regulatory agencies and resources are linked below:

Ministry of Health Registration and Control Department (Ministerio de Salud, Dirección de Registros y Controles) handles processed foods and beverages.

Plant Health Service (Servicio Fitosanitario del Estado) handles grains and oilseeds, ornamental plants, fresh fruits and vegetables and other products of fresh fruit/vegetable origin.

National Animal Health Service (Servicio Nacional de Salud Animal) handles live animals and products of animal origin, including fresh meat and meat products, milk, cheese, eggs, pet food, animal feed, and ingredients for pet/animal food.

SECTION IV. MARKET SECTOR STRUCTURE AND TRENDS

Overall Business Climate and Consumption Trends

Traditional Costa Rican cuisine is centered around a lightly seasoned grilled protein (e.g., fresh fish, chicken, or beef), black beans, and rice. And while beef still holds a symbolic place in the traditional Costa Rican diet, lower-priced poultry meat has long outpaced beef as the most popular protein.

Animal protein consumption continues to increase along with the standard of living. Pork has recently become a more attractive protein for local consumers and U.S. pork exports to Costa Rica reached a record \$70 million in 2024, increasing 59 percent.

Though traditional foods remain central to the Costa Rican diet, new tastes are readily accepted. Costa Rican consumers spend more of their food budget on prepared foods than all others in the Central American region. This includes a growing interest in healthy products with a preference for organic and natural ingredients, and a demand for innovative flavors and formats. For example, kombucha is increasingly popular as a trendy drink among a growing segment of urban consumers. Kombucha conveniently falls within leading consumer trends including wellness, nutraceuticals (especially probiotics), and prepared food convenience, while offering a range of popular local flavors like mint, ginger, hibiscus (aka jamaica), and tropical fruits. Local brands (e.g., Wild Brews, Bella Bucha, and Kombucha Cultura) may include CBD and typically retail for between \$3 and \$6 per unit, but FAS San José sees room in the market for price-competitive imported offerings, despite the expense of shipping beverages.

A small but strong interest in ‘plant-based’ protein products among higher income consumers, associated with vegan, vegetarian, and flexitarian lifestyles, is commanding additional shelf space across a wide range of retailers in the GAM. Plant-based dairy alternatives are quite common and increasingly popular, with coconut and almond-based beverages eating into soy-based products’ once-dominant share of the market. The plant-based trend overlaps with continued demand growth for gluten-free products (e.g., pizza crusts, baking flours, and pastas). FAS San José expects this trend to persist and grow over the medium-term.

Environmentally responsible packaging is another consumer trend that FAS San José and industry contacts expect to continue to gain interest, as consumers increasingly seek out biodegradable (if not compostable) packaging. Costa Rica banned styrofoam packaging and containers in August 2021.

Food Processing Sector

Costa Rican food processors continue to rely on imported ingredients and raw materials to grow their operations. A more in-depth analysis of the food processing and ingredients market is available in the [Food Processing Ingredients Report](#).

Retail Food Sector

There are good retail sales prospects for a large range of U.S. consumer-oriented products, including: beef, pork, poultry, cheese, yogurt, ice cream, processed fruits, tree nuts, confectionary, frozen products, food preparations, wine, beer, snack foods, condiments, natural/organic food products, pet food, and bakery goods/cereals/pasta. U.S. consumer-oriented product exports have demonstrated an impressive average annual growth rate of 14 percent over the past 5 years, reaching \$506 million in 2024. More information on the retail sector is available in the [Costa Rica Retail Foods Report](#).

Hotels and Resorts

According to the Costa Rica Tourism Board (ICT), tourist arrivals reached record numbers in 2024. Of the total of 2.6 million travelers arriving in Costa Rica by air in 2024, 1.6 million were from the United States. However, Costa Rica's tourism industry is facing a slight downturn in 2025, with a 2.2 percent drop in visitor arrivals through September.

Hotels and resorts in Costa Rica offer a wide range of accommodations for the growing business and tourism industries, with a special emphasis on eco-tourism. The popularity of peer-to-peer rental properties, through platforms such as AirBnb or VRBO, is eating into traditional hotel stays, but also driving tourism into new areas as the range of properties expands.

Food Service Sector

Continued restaurant sector expansion offers opportunities for U.S. exporters to supply international franchises and fine dining outlets in Costa Rica. The number of restaurant franchises in Costa Rica has grown 65 percent over the last ten years, generating more than 26,500 direct jobs. In recent years, neighborhoods in eastern San José have become culinary focal points, with innovative establishments in old neighborhoods like Rohrmoser, Los Yoses, and Barrio Escalante. More information on this sector is available in the latest FAS San José [Hotel, Restaurant, and Institutional Market GAIN report](#).

Growth in digital ordering platforms more than doubled across nearly every category of foodservice in 2025, providing operators vast quantities of new consumer data that have accelerated understanding of and responsiveness to consumer behavior and preferences.

Table 2: Leading Franchises in Costa Rica

Franchises	Owners	Points of Sale
Subway	Restaurants Subs SRL Subway	79
McDonalds	Arcos Dorados	79
Kentucky Fried Chicken	Grupo Inversor Intelectiva	67
Pizza Hut	Comidas Centroamericanas	64
Papa John's	Drake Food Service Internacional (DFSI)	57
Taco Bell	Inversiones TB	54
Burger King	Alimentos Exclusivos BKCR S.A.	44
Quiznos	Grupo QZCR	29
Starbucks	Starbucks	29
Cantón	Canton Brand Group	8
Domino's Pizza	Grupo Empresarial - ABLAT	8
Dunkin	Enjoy Group	8
Arbys	Alimentos Exclusivos BKCR S.A.	6
Smashburger	Grupo QZCR	5
Teriyaki	Grupo QZCR	4
Johnny Rockets	AR Holdings	4
Hooters	Chatwoods SA,	4
Krispy Kreme	Krispy Kreme Guatemala y Costa Rica	4
Yard House	AR Holdings	1
Ready Pizza	Ready Pizza	1
Capital Grille	AR Holdings	1
PF Chang's	Coprocom	1
The Olive Garden	AR Holdings	1
Popeyes	Alimentos Exclusivos BKCR S.A.	1

Source: El Financiero, FAS San José

SECTION V. AGRICULTURAL AND FOOD IMPORTS

Costa Rica's economy is expected to stay remain stable and grow between 3.4 - 3.8 percent in 2026, providing excellent opportunities for high-value, consumer-oriented products from the United States. U.S. companies, restaurants, and supermarket chains have been highly successful in Costa Rica, developing a strong presence in the country.

Beef, pork, and poultry sales have increased substantially in recent years, particularly following the elimination of the CAFTA-DR tariff rate quota on chicken leg quarters in 2022. Exports of processed, prepared, and preserved meats expanded significantly in the last few years and consumption of prepared food and meals continues to grow. Bakery and confectionary products, condiments and sauces, food preparations, and alcoholic beverages continued to demonstrate impressive levels of growth in 2024. Gourmet products and prepared foods are widely distributed throughout the country, servicing tourism outlets and niche communities of high- and medium-income consumers. And though the meteoric growth in pet food sales has slackened, FAS San José expects U.S. exports will remain strong over the medium-term.

Though relatively small, the Costa Rican food processing sector relies on U.S. exporters to maintain critical supply chains for the manufacturing of confectionary and bakery products, sauces, condiments, dairy products, and beverages. More information on the food processing and ingredients market is available in the latest [Food Processing Ingredients Report](#).

Costa Rican consumers continue to look for new dairy products, with comparatively high local prices. Facility registration requirements for new-to-market U.S. dairy facilities and products were significantly streamlined in May 2025, opening up new possibilities for U.S. producers and exporters.

Table 3. Costa Rican Food and Agricultural Import Values from Top Suppliers (in million USD)

	2020	2021	2022	2023	2024
United States	1,606	1,724	1,873	2,011	2,134
EU 27 External Trade (Brexit)	1,712	1,802	1,957	2,004	2,010
Guatemala	282	312	361	410	485
United Kingdom	269	272	289	3,052	314
Honduras	158	208	221	254	271
El Salvador	158	185	216	221	240
Canada	229	245	221	237	238
Panama	164	189	223	225	228
Switzerland	89	108	129	134	145
Dominican Republic	76	76	83	88	99
Mexico	176	242	50	19	89

Data Source: Trade Data Monitor, LLC.

Note: Values in this table reflect CIF landed values of imports from the Costa Rican National Institute of Statistics, and these numbers may differ from U.S. Census Bureau data drawn from the FAS Global Agricultural Trade System used throughout the report.

Table 4. Leading Consumer-Oriented Categories for U.S. Exports in 2024

Product Category	U.S. Exports to Costa Rica in million USD	Opportunities for U.S. Suppliers
Pork & Pork Products	70*	The upward trend of pork consumption has remained strong over the past three years.
Dairy Products	60*	U.S. dairy exports to Costa Rica doubled in value between 2021 and 2024. In May 2025, Costa Rica's National Animal Health Service (SENASA) implemented a simplified procedure for registering U.S. dairy facilities for export, replacing a questionnaire-based process. The demand for U.S. dairy products is increasing in the local market.
Food Preparations	40*	Retail and food service outlets support growing demand for food preparations that reduce cooking time.
Processed vegetables	35*	Consumer demand for processed vegetables and fruits has grown, driven by the demand for convenient, healthy foods.
Bakery Goods, Cereals, and Pasta	33*	Costa Rican consumers are seeking out new bakery products, nutritional cereals, and new flavors/varieties of pasta.
Condiments & Sauces	28*	Condiment and sauce imports have steadily increased as part of a trend of diversifying the food industry for the HRI segment.
Chocolate and Cocoa Products	17*	Chocolate product imports continue growing, reflecting the growing demand for quality confectionary products not only for the processing industry but for the retail segment

Data Source: U.S. Census Bureau Trade Data

*Denotes record high export levels

Table 5. Top 10 U.S. Agricultural Exports to Costa Rica in 2024

Commodity	Total Value (USD)	Total Volume (Metric Tons)	10-Year Average Value (USD)	10-Year Growth Rate
Corn	\$112 million	557,859	\$144 Million	-2%
Pork & Pork Products	\$70 million	19,440	\$30 Million	446%
Soybeans	\$63 million	144,882	\$121 Million	-41%
Soybeans Meal	\$62 million	152,944	\$41 Million	169%
Dairy Products	\$60 million	11,944	\$31 Million	310%
Poultry Meat and Prod.	\$55 million	25,200	\$36 Million	175%
Food Preparations	\$40 million	7,231	\$26 Million	147%
Cotton	\$36 million	17,189	\$20 Million	174%
Processed Vegetables	\$35 million	22,012	\$32 Million	23%
Pulses	\$33 million	26,879	\$12 Million	7755%

Data Source: fas.usda.gov

VI. KEY CONTACTS AND FURTHER INFORMATION

U.S. Department of Agriculture, Foreign Agricultural Services, San José, Costa Rica

Email: AgSanJose@usda.gov

FAS Website: <https://www.fas.usda.gov/regions/costa-rica>

Table 6. Key GAIN Reports for Costa Rica

REPORT #	TITLE	DATE
CS2024-0006	Food Processing Ingredients	April 17, 2024
CS2024-0013	Retail Foods	June 18, 2024
CS2025-0016	Food and Agricultural Import Regulations & Standards (FAIRS) Report	July 11, 2025
CS2025-0017	FAIRS Export Certificate Report	July 11, 2025
CS2023-0014	Food Service- Hotel Restaurant Institutional	October 16, 2023

Department of Commerce Country Commercial Guide: <https://www.trade.gov/country-commercial-guides/costa-rica-market-overview>

This report provides economic, market, and regulatory analysis for U.S. exporters looking to do business in Costa Rica, highlighting trends, and offering a practical overview of the local market.

For 2026, FAS San José expects Costa Rica to continue serving as key access point to the broader Latin American market and remain a promising market for U.S. agricultural products, with an export value of \$962 million in 2024.

Attachments: [BICO Costa Rica December 2025.pdf](#)