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Prepared By: Laura Calzada

Approved By: Zeke Bryant

Report Highlights:

Costa Rica's food service sector continues to expand and evolve, driven by changing local consumer tastes and a strong tourism sector. Tourist arrivals reached record numbers in 2024, but are currently down 2.2 percent through September 2025. Industry representatives attribute a combination of external economic challenges, currency appreciation, and infrastructure limitations as reasons for the decline. Despite this, the country's hotel, restaurant, and institutional (HRI) sector continues to expand with multiple luxury investments coming to fruition in 2025 such as the Waldorf Astoria Costa Rica and a Ritz-Carlton Reserve, plus new resort investment announcements. Tourism remains a critical engine for driving demand for U.S. consumer-oriented food and beverage product exports, which reached a record \$504 million in 2024.

Market Fact Sheet: COSTA RICA

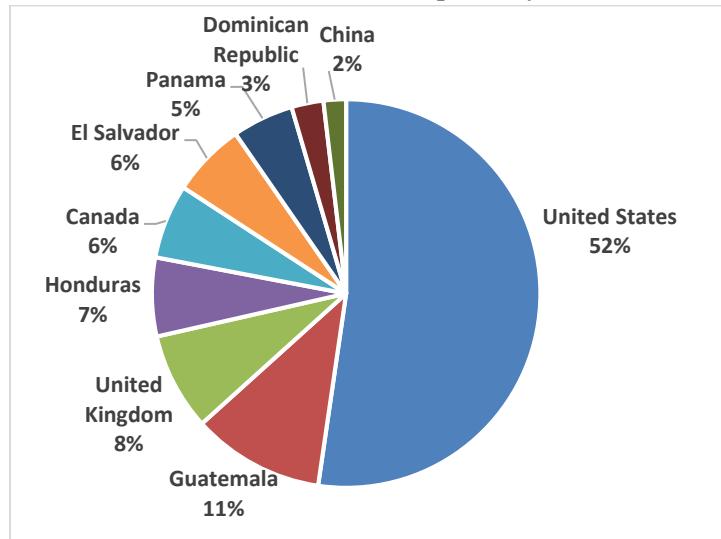
Executive Summary

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 of \$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 in 2024.

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. In 2024, imports of U.S. dextrin's, peptones, and proteins increased 49 percent to a record \$21 million.

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 2024

Imports of Agricultural products \$962 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) Automergado |
| 3) Pequeño Mundo | 4) Perimercados |
| 5) PriceSmart | 6) Mega Super |
| 7) Fresh Market | 8) Super Compro |
| 9) Mayca Retail Stores | 10) Saretto |

Population / GDP

- | | |
|--------------------|-----------------------|
| Population | 5.3 million |
| GDP (billions USD) | \$95 billion |
| GDP (per capita) | \$15,620 |
| Exchange rate | 510 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 Jose - AgSanJose@usda.gov

SECTION 1. MARKET SUMMARY

Overview of the Costa Rican Food Service Landscape

Costa Rica has positioned itself as a leading destination for tourism, namely in ecological and luxury experiences. The food service landscape continues to grow and is strongly driven by international visitors, expatriate communities, a stable middle-class, and high-income consumers. Hotels, restaurants, and catering services together represent a dynamic and growing segment for U.S. products. U.S. consumer-oriented food and agricultural exports to Costa Rica reached a record high of \$506 million in 2024 and are on pace to set another record amount in 2025.

A steadily rising standard of living, a robust tourism sector, an expanding range of modern hotel, restaurant, and institutional (HRI) outlets, and the increasing diversification of Costa Rican consumers' palates are expected to sustain demand for imported food products in the years ahead. However, despite the continued growth in sales, FAS San José views the 2026 food service outlook with caution as industry contacts point to logistics difficulties, significant local currency appreciation, and declining tourist numbers as growing concerns. According to the National Tourism Institute (ICT), 2.2 million visitors arrived in Costa Rica as of September 2025, 2.2 percent less compared to the same period as 2024. An estimated 55 percent of tourists in 2025 have come from the United States, followed by Canada and Mexico. The local tourism industry points to an unfavorable exchange rate, high prices, and a growing security crisis as reasons for the drop in tourist arrivals.

The food service sector is divided into commercial and non-commercial subsectors. The commercial food service subsector includes quick-service restaurants, full-service restaurants, caterers, and drinking establishments, representing 70 percent of total food service sales. The non-commercial subsector, mainly driven by the tourism industry, includes hotels, health care facilities, universities and schools, as well as grocery retailers offering hot prepared foods for dining in or to-go.

Within the Greater Metropolitan Area (locally referred to as the GAM for its Spanish initials) there are new emerging restaurant concepts. There is a growing interest in exclusive and immersive culinary experiences and chefs are elevating traditional ingredients with innovative presentations. In addition, high-end resorts are integrating local flavors with trendy concepts. Ghost kitchens exist but remain a niche idea. Speakeasy style bars offering rotating menus have also started to become trendy. Overall, Costa Rica's restaurant scene is evolving to include local authenticity, gastronomic creativity, and high-quality foods.

Costa Rica has a variety of franchise opportunities available, particularly in the restaurant segment. Several international franchises, including those from the United States, are actively seeking to expand into the Costa Rican market. For example, a combined Applebee's + IHOP restaurant opened in mid-2025 and seeks to expand to other locations. Dunkin Donuts opened its first store in Costa Rica in July 2024 and now has eight locations, with plans to open an additional several more over the next year. Other U.S. restaurant chains have also recently announced expansion plans, including Krispy Kreme, Pollo Tropical, Yard House, and

California Pizza Kitchen. As of 2023, there are an estimated 100 restaurant franchise locations throughout the country, the majority of which are U.S.-based businesses.

Despite infrastructure challenges in the region (notably chronic congestion at ports, delays at terminals, substandard roads, insufficient cold-storage capacity, and inefficient operations at the Liberia Guanacaste Airport), new hotels, restaurants, and residential developments continue to open, especially along the Pacific coast of the Nicoya peninsula. This area also receives sustained interest from digital nomads, who have boosted HRI activity in the region, with direct support from Costa Rican policies designed to attract this pool of global talent.

Tourism Continues to Drive Economy Despite Slight Downturn

According to the Ministry of Tourism, this industry represents 6.3 percent of GDP directly, and up 8.2 percent including indirect contributions, making it a significant economic driver for the country.

In 2024, Costa Rica set a record of 2.6 million foreign visitors who arrived by air, 59 percent or 1.5 million of which came from the United States. U.S. and European airlines continue to add new routes to both major airports in San Jose and Liberia in Guanacaste. Notably, beach hotels reached approximately 95 percent occupancy during Easter week holidays in 2025. Travelers from the United States have continued to make up a significant portion of in-bound tourists in 2025, creating opportunities for familiar U.S. products not produced in Costa Rica, including alcoholic beverages and snack foods.

Despite local price sensitivities, the hotel sector continues to invest in premium food and beverage products to enhance guest experiences, especially in high-end specialty restaurants at four and five-star hotels.

Costa Rica's tourist season is divided into high (November to April) and low (May to October) seasons. Many HRI contacts shared with FAS San José that 2025 was the most difficult low season since 2020, especially for Pacific coast resorts. However, contacts remain optimistic for another strong high season into 2026 based on positive booking data.

Table 1: Key Travel and Tourism Indicators 2024

Total international arrivals by air, land, and sea	2.7 million
Arrivals from U.S.	1.5 million
International spending	\$5.4 billion
Growth versus 2023	7.7 percent
Tourism spending per capita	\$1,508
Travel and Tourism as a Percent of GDP	8.2 percent
Travel and Tourism as a Percent of Employment	8.8 percent
Preferred activities	Beach activities, exploring national parks, hiking, ziplining, and observing wildlife

Source: Costa Rican Tourism Institute and Costa Rica Migration database

Table 2: Advantages and Challenges for U.S. Products in Food Service

Advantages	Challenges
U.S. products' reputation for quality and increasing diversification of consumer preferences.	Large numbers of smaller hotels, which raise distribution costs and reduce per location sales volumes for importers / distributors
Logistics advantages relative to EU-origin competitors.	Strong competition, historical linkages to European and other Latin American suppliers and products
Large numbers of U.S. tourists, who seek out familiar U.S. products.	Relatively small size of the sector and expensive, inefficient overland logistics within Costa Rica
International restaurants, franchisees, cafés, fast-food outlets, and hotel chains are increasing in number.	U.S. chains depend on imports to supply demand, making them vulnerable to tariffs, sanitary restrictions, or logistics delays.
Costa Rica marketing itself as an eco-luxury destination which attracts high income tourism.	Appreciation of Costa Rican colon against the U.S. dollar, raising costs for tourists and HRI sector.

SECTION II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

1. Investigate import requirements and comparable products availability/pricing.
2. Identify a reliable importer/distributor, knowledgeable of your product category and of Costa Rican regulations and import procedures.
3. Consider participating in a trade show or participating in USDA or State-Regional Trade Group-funded promotional activities to find import partners.

Selecting the right partner is one of the most important decisions for a prospective exporter when developing a business strategy. It can be helpful to have an experienced distributor and/or customs broker to assist with managing customs clearance, sanitary/phytosanitary inspection requirements, and any guarantees or other licensing procedures that may be required. U.S. exporters interested in entering the food service market in Costa Rica should contact local importers, who also typically serve as wholesale distributors to HRI accounts. For more information on import requirements, see FAS San José's [2025 Food and Agricultural Import Regulations and Standards Report](#).

Licenses and franchises are common in Costa Rica. Distribution services are typically governed by private agreements/contracts among parties. Local laws allow companies and individuals to import directly with no intervention from agents or distributors. Costa Rican importers are typically bilingual, and business practices in Costa Rica resemble those in the United States.

Logistics are an especially important consideration. While global container shortages and booking times have mostly normalized, multi-day delays at Costa Rica's over-burdened and underdeveloped Pacific port of Caldera continue to add to shipping costs. While the Atlantic port

of Moín is better equipped to manage container shipments, Moín is limited by the depth of the port and overland logistics to San José, especially during the rainy season (May to October). Local importers hold U.S. products in high regard with respect to quality, price, and packaging. Due to the geographic proximity of the United States, U.S. food and beverage products represent a plurality of foreign products imported into Costa Rica. Local importers have considerable experience working with U.S. companies and have extensive knowledge of the U.S. food export system. Most importers carry full lines of fresh, frozen, and dry products, while a smaller number of importers specialize in providing fresh produce, seafood, and alcoholic beverages.

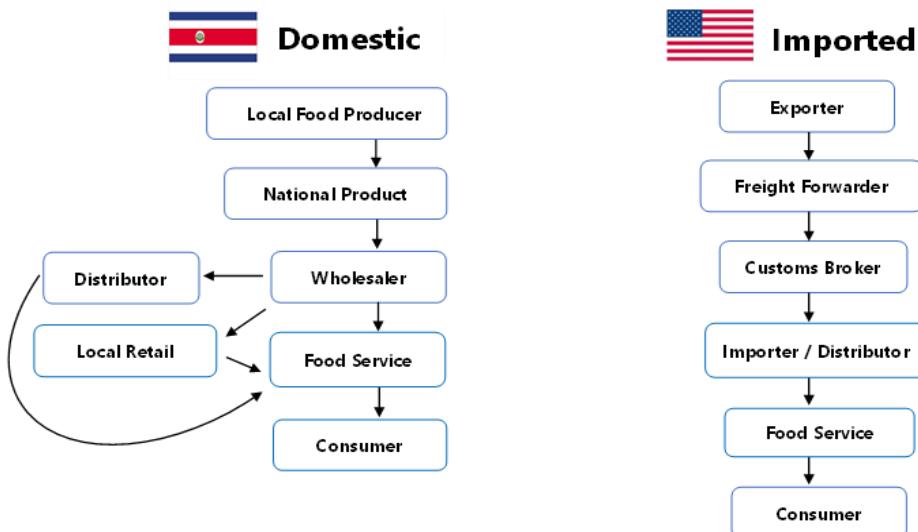
Food Service Market Structure

Purchasing power is concentrated around the capital; 73 percent of the country's 5 million consumers live in the San José metropolitan area, also known as the Central Valley. As the food service sector relies heavily on imports, there are many companies dedicated to meeting the demand for imported food and beverages. While storage and handling may look different (e.g., cold chain for frozen and perishable items vs. shelf-stable products), the structure of distribution channels do not vary significantly from one product to another.

Quick service restaurants, high-end restaurants, as well as larger hotels and resorts purchase their food and beverages through local importers. There are well-developed distribution chains for smaller restaurants and coffee shops that source inputs from wholesale and retail outlets. Some larger hotels have even positioned offices in south Florida to facilitate sourcing U.S. products.

Specialty ingredients and products are regularly imported from the United States. These products include wine, distilled spirits, dairy products, beef, pork, frozen potato products, sauces, condiments, drink mixes, and ingredients for foreign cuisines such as Italian, Thai, Japanese, Chinese, Peruvian, and Mexican. However, high-end restaurant contacts have shared that certain specialty products such as fresh/dried truffles and lobsters are not easy to find.

Figure 1: Distribution Channels in the Costa Rican Market



Source: FAS/San José research

Hotel Sector

Anticipating growing competition from new properties, older and more established hotels are renovating and improving their offerings. Costa Rica's major hotels, particularly upscale brands, include high-end restaurants. Such food service options aim to provide guests with onsite dining selections, especially in more secluded beaches and eco-hotels, where other local dining options may not be available or easy to reach. The Costa Rican Tourism Board provides a [comprehensive list of hotels](#) that can be sorted by location, price, and star-rating. According to the Tourism Board, the number of hotel rooms increased 6.5 percent in 2024. Investment in the hotel sector, mostly from U.S. sources, is expected to grow by 5 percent in 2025.

There are several standout projects currently in development or recently opened in the northwest Pacific area known as Guanacaste. New Waldorf Astoria by Hilton and Ritz Carlton Reserve by Marriott resorts opened in the Guanacaste area in 2025. In addition, Marriott announced this year plans to open one of the first all-inclusive JW Marriott resorts in Guanacaste by the end of 2026. A 240-residence development by Discovery Land Group known as Zapotal Golf and Beach Club also opened in 2025 and expects to be completed over the next 10-15 years. Zapotal will target the ultra-luxury segment of international tourism.

Restaurant Sector

Restaurant industry sales through the first eight months of 2025 are reportedly up a few percent, but face headwinds from high prices and an unfavorable exchange rate. Some restaurants, especially in the San José area, note profit challenges from the growing popularity of online ordering platforms.

FAS San José expects higher prices to result in fewer visits to food service establishments by local consumers, possibly pushing these consumers towards more economical dining options. However, increasing competition has restaurant owners searching for unique offerings and carrying out expansive marketing campaigns.

In the restaurant sector, U.S. consumer-oriented products continue to see success, especially meat and dairy products. Other products, such as seafood, are highly sought after by importers and chefs due to strong demand. In 2024, U.S. seafood exports to Costa Rica reached \$14 million, marking a 12 percent increase compared to 2023.

Table 3: Top Foodservice Restaurant Chains, Hotel Chains, and Distributors in Costa Rica

Restaurant Chains	Hotel Chains	Food and Beverage Distributors
Arby's	Andaz Costa Rica Resorts	Alimentos Kamuk
Burger King	Autograph Collection Hotels	Alimentos Pro Salud
Carls Junior	Barcelo Group	Alpiste
Chili's	Best Western International	Alpemusa S.A.
Domino's	Casa Conde Hotel and Suites	Belca de Costa Rica
Il Panino	Cayuga Collection Hotels	Comercializadora Alfa S.A.

Kentucky Fried Chicken	Choice Hotels	Ciamesa
Little Caesar's	Crowne Plaza Hotels	Comproim
McDonald's Corporation	Curio Collection by Hilton Hotels	Delika By Gourmet Imports
MTY Food Group Inc.	Enjoy Group	Distribuidora Alfa S.A.
Enjoy Group Restaurants	Four Seasons Hotels & Resorts	Distribuidora Islena
Papa Johns	Grupo Islita	Distribuidora Pedro Oller
Pizza Hut	Hampton	Global Partners
Popeyes Lousiana Kitchen	Holiday Inn	Mayca/Sysco
Teriyaki	Hotel Riu	PMT CR
Spoon	Hyatt Group	Prime Foods
Starbucks Corporation	Intercontinental Hotel Groups (IHG)	Sigma Alimentos
Subway	Marriott Hotels	Suplidora Royal
Taco Bell	Radisson Hotels	Universal de Alimentos
Tony Romas	Sheraton Hotels	Distribuidora Exelson
Quiznos	Tabacon Grand Spa	
Applebee's	Waldorf Astoria	
Smashburger	Westin Reserva Conchal	
Panda Express	Wyndham Garden	

Source: FAS/San José research

Institutional

The institutional segment in Costa Rica includes company cafeterias, hospitals, nursing/retirement homes, schools, golf courses and country clubs, prisons, and catering for airlines, trains, ships, and special events. Catering for private events and parties, especially higher-end events like weddings, has been a particularly profitable slice of the institutional segment. Graduations, weddings, corporate events, and conferences are a growing segment with demand for catering services.

In addition, Costa Rica's food service sector also serves cruise ships docking in Puntarenas (Pacific coast) and Limón (Caribbean coast), as well as airlines. The country's largest cruise and airline catering company sources premium U.S. ingredients, including beef, wine, and dairy, to meet its high-quality standards

SECTION III. COMPETITION

As a result of Costa Rica's wide range of free trade agreements, U.S. food and beverage products face strong competition from third country suppliers, including Mexico, Brazil, Nicaragua, Canada, Guatemala, and Chile. Strong competitors for U.S. snack and processed foods exporters include Guatemala, Mexico, and Colombia. Wines compete with Chilean, Spanish, and Argentine offerings, and U.S. beef contends with products from Chile, Guatemala, and Nicaragua. Strong demand for pork has benefitted U.S. exporters and attracted the interest of Chilean and Canadian suppliers. Local producers are increasingly

providing vegetables, fruits, and processed foods, as well as poultry, beef, pork, and seafood to hotels and restaurants servicing the tourism sector.

Table 4. Leading Agricultural Import Suppliers to Costa Rica 2020-24 (millions USD)

Partner	2020	2021	2022	2023	2024
World	\$ 1,903	\$ 2,404	\$ 2,578	\$ 2,936	\$ 3,081
United States	\$ 838	\$ 1,123	\$ 1,065	\$ 1,147	\$ 1,100
Mexico	\$ 152	\$ 188	\$ 227	\$ 259	\$ 297
Brazil	\$ 74	\$ 80	\$ 171	\$ 252	\$ 287
Nicaragua	\$ 114	\$ 128	\$ 160	\$ 174	\$ 165
Chile	\$ 70	\$ 79	\$ 89	\$ 101	\$ 134
Guatemala	\$ 82	\$ 88	\$ 109	\$ 114	\$ 123
Canada	\$ 80	\$ 107	\$ 95	\$ 121	\$ 122
Spain	\$ 43	\$ 59	\$ 58	\$ 71	\$ 82
Honduras	\$ 43	\$ 59	\$ 57	\$ 81	\$ 66
Uruguay	\$ 29	\$ 26	\$ 40	\$ 56	\$ 63
Colombia	\$ 29	\$ 36	\$ 42	\$ 48	\$ 62
China	\$ 39	\$ 41	\$ 41	\$ 45	\$ 58
Peru	\$ 29	\$ 36	\$ 30	\$ 37	\$ 54
Netherlands	\$ 30	\$ 43	\$ 53	\$ 55	\$ 53

Source: Trade Data Monitor LLC

SECTION IV. BEST PROSPECTS PRODUCT CATEGORIES

The foodservice landscape continues to evolve and adapt to demographic and consumer behaviors in Costa Rica. Below are some of the trends that are driving sales in the food service sector, including a wide range of meat and dairy products, beverages, prepared foods, and specialty ingredients.

- Costa Rican consumers are increasingly seeking out healthier eating habits, including plant-based and alternative protein menu items.
- Younger generations are driving growth in eating away-from-home and food delivery options, driving adoption rates for delivery services by food service operators.
- Demand for seafood is increasing from both local consumers and tourists.
- An increasing number of high-end hotels and resorts, particularly in areas like Guanacaste, are targeting wealthy travelers who demand premium food and beverage products.

- Eco-friendly and sustainable marketed products are gaining popularity, aligning with Costa Rica's well-established ecotourism image.

Table 5. 2024 Top U.S. Consumer-Oriented Exports to Costa Rica (million USD)

	2020	2021	2022	2023	2024	Jan - Jul 2024	Jan - Jul 2025
Consumer Oriented Total	294	393	415	457	506*	282	344
Pork & Pork Products	23	42	34	44	70*	40	49
Dairy Products	26	32	40	43	60*	33	51
Poultry (excl. eggs)	30	33	43	64	55	30	38
Food Preparations	25	27	30	33	40	23	22
Processed Vegetables	26	39	37	37	35	20	18
Bakery, Cereals, & Pasta	23	26	29	30	33	18	21
Dog & Cat Food	27	45	48	39	29	17	18
Beef & Beef Products	15	32	34	30	28	16	24
Condiments & Sauces	15	18	19	24	28	16	16
Fresh Fruit	11	9	7	12	17	7	10
Chocolate & Cocoa	10	12	13	14	17	9	8
Fruit & Vegetable Juices	7	6	5	11	15*	8	10
Tree Nuts	13	12	13	11	14	7	10
Other Consumer Oriented	10	13	14	14	14	8	8
	294	393	415	457	506*	282	344

Data Source: U.S. Census Bureau Trade Data

** Denote Highest Export Levels Since at Least CY 1970*

SECTION V. POST CONTACTS AND FURTHER INFORMATION

U.S. Department of Agriculture, Foreign Agricultural Service (FAS), San José, Costa Rica

Phone: (+506) 2519-2285

Email: AgSanJose@usda.gov

Please refer to the FAS San José Exporter Guide for links to additional sources of information.

Attachments:

No Attachments