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Report Highlights:

Costa Rica's dynamic retail sector reflects economic growth and rising consumer demand. Tourism, new culinary trends, and social media drive purchasing decisions, with premium consumers seeking healthy products and sustainable packaging. In high-tourism areas outside the San Jose Greater Metropolitan Area, retailers are upgrading product quality and expanding their imported offerings to serve the booming vacation rental market. U.S. exports of consumer-oriented products to Costa Rica reached a record high of $595 million in 2025.

Market Fact Sheet: COSTA RICA

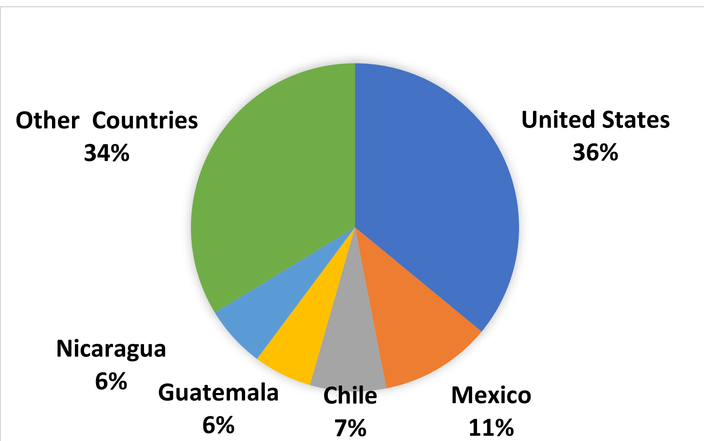
Executive Summary

Costa Rica was reclassified as a high-income country in July 2025. The Costa Rican Central Bank estimated nominal GDP grew 3.8% to $103 billion in 2025. The United Sates is Costa Rica's largest trading partner and largest foreign direct investor. Costa Rican consumers trust and enjoy U.S. food and beverage products, which exports of and demand for have increased since the 2009 entry into force of the Dominican Republic - Central America Free Trade Agreement (CAFTA-DR). Proximity to the United States is an advantage for logistics and for U.S. exporters' ability to develop and service customer relationships. Costa Rica ranked 29th among U.S. agricultural export markets in 2025, with U.S. agricultural and related product exports to Costa Rica reaching a record $1.2 billion.

Consumer-Oriented Product Imports

In 2025, nearly all U.S. agricultural products entered Costa Rica tariff free under CAFTA-DR. Strong prospects for U.S. consumer-oriented products – dairy, beef, pork, poultry, bakery goods, condiments, sauces, cereal, tree nuts, pasta, juices, beer and distilled spirits – helped push U.S. category exports up 18 percent to a record high of $595 million in 2025. U.S. dairy exports reached a record $88 million in 2025, rising 46 percent year-over-year.

2025 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' distribution channels supply wholesalers, distributors, and retailers, as well as hotels, restaurants, and institutional buyers. 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 Jose metropolitan area.

Quick Facts CY 2025

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

List of Top 10 Growth Products in Host Country

1) Dairy	2) Pork
3) Meat	4) Poultry
5) Beer	6) Fresh Vegetables
7)Juices	8) Condiments & Sauces
9) Distilled Spirits	10) Tree nuts

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) BM Supermercados	10) Saretto

GDP/Population

Population *(millions)*:	5.2 million
GDP *(billions USD)*:	$103
GDP per capita *(USD)*:	$19,800
Exchange Rate	488 Colones : S1 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. products largely enter duty free and quota free.	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.

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

Section 1: Market Summary

Overview of the Costa Rican Retail Landscape

FAS/San José maintains a positive outlook for the Costa Rican retail market in 2026, anticipating sustained economic growth, increasing consumer demand, and a competitive retail environment. The relative strength of the Costa Rican Colón against the U.S. Dollar has driven down the cost of U.S. food and beverage products for importers, fueling greater interest in new-to-market products among retailers, distributors, and local food and beverage companies. However, exchange rate savings on imported products have generally not been passed on to consumers, as retail prices have remained relatively high following a period of inflationary pressure in 2022 and 2023. Persistently high unemployment and recent inflation have supported increased demand for lower-priced and private-label products.

Retailers continued to rely on imported foods to fill their shelves and to help introduce new trends to Costa Rican consumers. U.S. Census Bureau trade data shows U.S. consumer-oriented product exports climbing 18 percent by value in 2025 to a record high of $595 million. More than 50 percent of the products in major retail outlets are estimated to be imported, with approximately 33 percent of total consumer-oriented food imports coming from the United States. Other leading food exporters to Costa Rica include Mexico, Chile, and Guatemala.

Costa Rican retail industry growth is stable, driven in part by promotional activities, consumers' access to credit, and increasing penetration by e-commerce platforms. Competition has increased among retail stores, driving traditional grocery retailers to expand into wider offerings of clothing and home goods. Likewise, general merchandisers such as Pequeño Mundo, Ekono, Almacenes el Rey, and Libreria Universal have integrated a growing array of non-perishable and snack items into their retail offerings as players in the sector seek new growth opportunities. New supermarkets outside of the metropolitan area, such as BM Supermercados in the southern Pacific coast and Super Negro in the Caribbean are expanding their imported product portfolios to respond to growing demand from the vacation rental segment (e.g., Airbnb, Vrbo, etc.) of the tourism sector as well as digital nomads and other U.S., Canadian, and European expatriates.

Key Marketing Drivers and Trends

Private Labels & Price-Conscious Consumers

Rising costs-of-living, a stronger local currency, and continuing ripple effects of global supply chain challenges have contributed to increased price consciousness among consumers. Already popular private label products are expected to see continued strong sales in 2026. Some of the most common private label products are canned tuna, rice, flour, condensed milk, condiments, and canned vegetables.

E-Commerce Growth

As major retailers have improved their e-commerce platforms, independent and small grocery stores have struggled to compete. Across the Greater Metropolitan Area of San Jose, home to most Costa Rican economic activity and population, the adoption of e-commerce has benefitted from a culture of goods and services delivered to consumers' doorsteps, including things like dry cleaning, veterinary services, and propane tanks. Delivery platforms and apps continue to develop new ways to appeal to consumers, making them ever more indispensable to a wider range of consumers. Costa Ricans are expecting new investments in 5G infrastructure in 2026 and continued service digitalization in the years ahead.

Ready-to-Eat and Cafeterias

Costa Rican consumers are taking increasing advantage of ready-to-eat meals and pre-cut fresh products rather than going out to eat. This trend is an indication of changing consumer preferences for convenience, fresh products, and away from time-consuming meal preparation. Salads, sandwiches, and roasted chicken are increasingly popular options for Costa Rican consumers, including for dining within retail spaces. Walmart, Automercado, and Pequeño Mundo have followed PriceSmart (a warehouse club chain) in offering on-site cafeteria services to claim greater shares of consumer spending.

Outlook for 2026

Costa Rica's position as a global sustainability leader continues to shape its retail landscape. Manufacturers offering innovative, sustainable packaging solutions can command premium prices.

In San José's Greater Metropolitan Area—home to 60 percent of Costa Ricans—retail competition intensifies as major chains like Automercado, PriceSmart, Saretto, and Mas x Menos leverage economies of scale for competitive pricing and expanded discount offerings. Marketing strategies emphasize digital engagement through virtual cooking classes, Facebook and Instagram content, online tastings, social media interviews, influencer collaborations, and interactive promotions, reflecting Costa Rican consumers' strong social media presence and receptiveness to new products.

Local retailers encourage U.S. food manufacturers and suppliers to:

- Consider producing for retailers' private label brands;
- Promote novelty food and beverage items (marketed to tourists and expat retirees);
- Support e-retail and digital marketing promotions;
- Consider 'tropicalizing'[1] products for the Costa Rican market; and
- Consider more environmentally friendly packaging.

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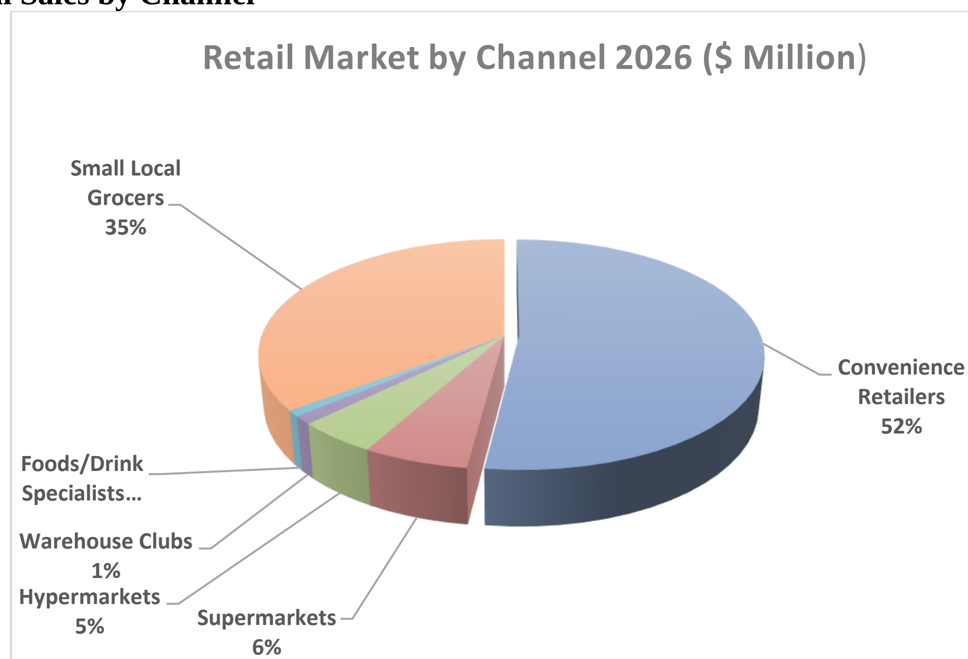
[1] 'Tropicalizing' refers to adjustments tailored to Central American markets, including appropriate packaging (i.e., smaller package sizes to minimize spoilage and price) and incorporating popular local flavors (i.e., tropical fruits).

Table 1. Advantages and Challenges for U.S. Products in Costa Rica

ADVANTAGES	CHALLENGES
Geographic proximity contributes to logistics advantages	Low-volume shipments of high-value U.S. exports typically consolidated, adding to freight costs.
U.S. exporters sustain reliable supply volumes of many products throughout the year.	U.S. exports are not well-suited to smaller-scale retail outlets who sell smaller formats to keep prices down.
Growing interest in health and self-care generates greater demand for healthy ingredients.	South / Central American products have high penetration and culturally familiar marketing.
Rising consumption of frozen and prepared foods supports imported ingredient demand.	Lower purchasing power and limited supply chain development outside of the San José area.
CAFTA-DR removed tariffs for nearly all U.S. food and beverage products. Tariffs on U.S. dairy products zeroed out on January 1, 2025	Facility registration processes for some products (dairy, seafood, lamb, egg) deter exporters from entering the market.

ADVANTAGES	CHALLENGES
Costa Rica supports science-based international standards and participates in international standards setting bodies	Costa Rica's slow and cumbersome bureaucracy, including apostille requirements, increases business costs and slows transaction times.
Costa Rica is not self-sufficient in basic commodities and depends on imported ingredients, grains, and legumes.	Costly alcohol tax regime adds to imported wine, beer, and spirit costs.
High rates of travel to/from United States increases recognition of U.S. brands & products	Limited penetration of craft beers results in limited distribution networks and higher listing fees.
Strong tourism sector (local and international) creates demand for high value imported products	Increasing demand for 'local products' from tourism operators seek to create authentic experiences.
Well-developed cold-chain infrastructure serving the population core of San José as well as tourist destinations in Guanacaste.	Underdeveloped overland and port infrastructure increases shipping costs / times, especially outside of San Jose.

Figure 1: Retail Sales by Channel



Source: Euromonitor

Retail Profiles

The six major supermarket retailers in Costa Rica are: Walmart (United States), Gessa (Costa Rica), AutoMercado (Costa Rica), PriceSmart (United States), Pequeño Mundo (Costa Rica), and Megasuper (Colombia). The Costa Rican retail sector can appear more diverse than it really is, as U.S. retailer Walmart operates the Mas x Menos, Pali, Maxi Pali, and Walmart banners, which comprise nearly a third of all large format retail outlets. Small format stores, including pulperías and mini supers, remain the most numerous types of retail shopping outlets throughout the country, offering individual servings and smaller format products that cater to lower-income households.

Convenience stores AM/PM, Fresh Market, and Vindi are growing their presence. Costa Ricans are increasingly drawn to these stores, which are slowly displacing traditional pulperías that can still be found in lower-income neighborhoods and rural communities. There are more than 15,000 pulperías and mini-supers in Costa Rica, and these stores remain essential for lower-income households, as these outlets typically offer informal credit terms to local customers. These traditional retailers are favored for daily shopping, especially by older consumers. Due to size restrictions, these stores work with importers to buy smaller volumes and often break up standard format packages into smaller quantities / volumes.

Section 2: Road Map for Market Entry

Figure 2. Channels for Distribution Flow Chart

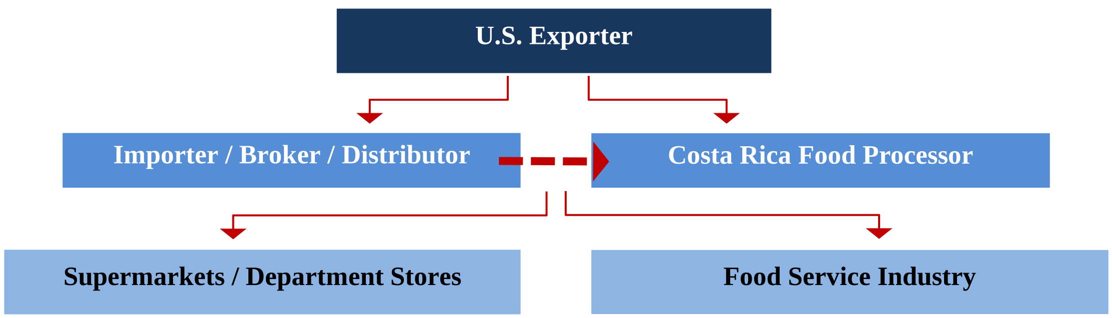


Table 2. Leading Food Retailers in Costa Rica

Name of Retailer	Description	Number of Outlets
Maxi Pali/ Pali	Supermarket	291
Inversiones AM/PM	Convenience Store	83
Mega Super	Supermarket	80
Super Compro /Guessa	Supermarket	52
Automercado	Supermarket	46
Mas x Menos	Supermarket	39
Fresh Market	Convenience Store	34
Perimercados	Supermarket	18
Mayca Retail Stores	Convenience Store	19
Pequeño Mundo	Department Stores	19
BM Supermercados	Supermarket	17*
Walmart	Department Stores	15
PriceSmart	Warehouse Club Store	11

Source: Websites of retailers and FAS contacts

** BM will be increasing to two more stores in the South Pacific in the next year according to our local contract.*

Section 3: Competition

Costa Rica imports a large variety of consumer-oriented products to support consumers' and processors' demands. U.S. exporters will face strong local competition in many areas, as well as increasing competition from other countries. Costa Rican producers are particularly competitive in meats (fresh and processed), dairy products, coffee, spices, condiments/sauces, vegetable oils, candies and chocolates, pasta, snacks, bakery and pastry products, soups, beverages (beer, bottled water, fruit juices), and, of course, tropical vegetables and fruits. Costa Rican imports of consumer-oriented food and agricultural products reached $596 million in 2025. Major suppliers include the United States, Mexico, and Chile.

Table 3. Top Suppliers of Consumer-Oriented Product Imports: Calendar Year (Value: Million USD)

Partner Country	2021	2022	2023	2024	2025
United States	448	462	535	594	685
Mexico	147	178	217	252	209
Chile	72	83	93	124	143
Guatemala	74	91	92	108	110
Nicaragua	61	77	96	102	117
Colombia	30	35	41	56	53
Honduras	48	48	66	54	59
Spain	42	40	49	53	62
Peru	20	25	34	49	58
China	32	30	34	47	55
World Total	**1,246**	**1,381**	**1,608**	**1,820**	**1,959**

Source: TDM U.S. Census Bureau Trade Data Monitor LLC

Section 4: Best Product Prospects

Table 4. Top Consumer-Oriented Products Imported to Costa Rica from the World: Calendar Year (Value: Million USD)

Consumer Oriented Products	2021	2022	2023	2024	2025
Soup & Other food preparations	147	163	188	1,821	216
Processed Vegetables	116	126	160	210	162
Bakery Goods, cereals and Pasta	117	135	161	174	176
Fesh Fruit	82	83	114	170	153
Dairy	86	109	115	141	162
Pork	58	54	71	130	139
Juices and non-Alcoholic beverages	52	70	85	113	97
Beef	64	71	89	104	128
Animal Feed	72	77	80	98	92
Chocolate and cocoa products	48	51	58	89	88
World Total	**1,246**	**1,381**	**1,608**	**1,821**	**1,959**

Source: TDM U.S. Census Bureau Trade Data Monitor LLC

Each of top ten best prospect categories for U.S. consumer-oriented exports to Costa Rica reached record high levels in 2025. While these categories present excellent opportunities for U.S. exporters, FAS/San José anticipates economic and pricing headwinds in 2026, which could bolster prospects for private label and ‘value’ products. Demand for healthy and/or gourmet snack items has been increasing in Costa Rica. Snacks with natural ingredients, dried fruits, whole grains, and high-quality ingredients have increased in popularity with health-conscious consumers. There is also growing demand for niche food items, such as organic, gluten-free, and ketogenic products, which provides new opportunities for U.S. exporters.

Table 5. Top Consumer-Oriented Products Imported from Costa Rica to the United States: Calendar Year (Value: Million USD)

Products	2021	2022	2023	2024	2025
Fresh Fruit	998	1,017	1,141	1,219	1,119
Processed Vegetables	90	116	143	139	157
Fruit & Vegetable Juices	75	88	92	104	129
Processed Fruit	121	125	109	121	123
Beef Products	40	33	41	71	93
Nursery Products & Cut Flowers	81	80	75	70	68
Fresh Vegetables	26	27	34	45	36
Total	**1,499**	**1,568**	**1,731**	**1,881**	**1,836**

Source: TDM U.S. Census Bureau Trade Data Monitor LLC

Products Present in Market with Good Sales Potential

FAS/San Jose anticipates continued and growing demand for U.S. consumer-oriented products in the local market. U.S. dairy, beef, pork, and poultry products should continue to see strong sales potential based on import demand and trends in food service and retail.

Dairy products are very popular among local consumers and there are potential opportunities for more products such as ice cream, butter, yogurts, and whipping cream in the market, particularly for bakeries and food service.

In addition, high protein and health-focused foods will remain a category that captures the attention of buyers.

Products Not Present in Market with Good Sales Potential

In general U.S. agricultural products maintain a strong presence in Costa Rica due to the longstanding trade relationship, reliable supply chains, and high consumer confidence of U.S. quality standards. However, there are some gourmet products such as truffles and other high-value food items that buyers continue to search for with limited success.

Product Not Present in Market due to Significant Barriers

Most U.S. food products enter Costa Rica at zero duty, but the government requires health and safety certificates and for some products, prior plant registration before they can access the local market. The Ministry of Agriculture enforces these controls, and shipments can be delayed or rejected if documentation or standards are not met, resulting in higher costs, supply disruptions, and limited product availability. For example, new seafood plant registrations have taken more than eight months to approve, discouraging new entrants and constraining growth for U.S. seafood exports.

Costa Rica's export certification requirements are simple in terms of the type and number of documents required as described in this report. However, seafood, and ovine products must register individual export production facilities with Costa Rica's Animal Health Service (SENASA), a process that typically takes more than 6 months depending on the product. The Ministry of Health (MINSA) requires processed food products to be registered as well.

Section 5: Key Contacts and Further Information

If you have questions regarding this report or need assistance exporting to Costa Rica, please contact the Foreign Agricultural Service in San José at:

Phone: +506 2519 - 2285 / 2333
Email: AgSanJose@usda.gov
website: https://cr.usembassy.gov/embassy/sanjose/sections-offices/department-of-agriculture/

For more detailed information on imported food regulations, please refer to FAIRS Report CS2025-0016 and the Fairs Export Certificate Report CS2025-0017

Attachments:

No Attachments