

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Costa Rica

Exporter Guide

Demand for US Food Products Growing

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Report Highlights:

Costa Rica continues to be an attractive market for U.S. exporters of food, beverages, and agricultural products. Consumers are highly receptive to U.S. food brands and recognize their high quality and innovative characteristics. Beer, wine, ingredients, processed meats and pet food are among the fastest growing categories of U.S. exports but great potential exists for other products such as prime beef cuts, wines, beer, and consumer-oriented goods. The increased penetration of franchises, international retailing brands and commercial plazas in Costa Rica are making local consumers more open to new food products creating unlimited potential for U.S. exporters.

Post:

San Jose

I. MARKET OVERVIEW

Costa Rica continues to be an attractive market for U.S. exports and consumers are highly receptive to U.S. food brands, trends and retailers, making the country ripe for export potential. Beer and wine, baking ingredients, processed meats and pet food are among the fastest growing U.S. export sectors with plenty of growth possible in other sectors as well. Costa Rican agriculture is well diversified and export oriented. The increased penetration of franchises, international retailing brands and commercial plazas in Costa Rica are making local consumers' shopping habits continue to become more open to new trends, discounts, and best value products. Promotions and discounts made most retailers in the country adjust their profit margins to adapt to this situation in order to maintain acceptable sales levels during 2015.

Costa Rica has achieved a fairly high level of economic development, the highest in Central America, in part because it abolished its military in 1948 and invested in health, education and infrastructure. Economic activity is dominated by tourism with the agriculture sector being the second largest source of employment in the country. The high tech and services sector has been growing in recent spurred by growing direct foreign investment primarily from the United States. Low inflation in 2015 was mainly the result of lower international commodity prices, including fuel prices. The Central Bank migrated last year to an "administered floating exchange rate system." Under this system, supply and demand is determined by the exchange rate and the Central Bank now only intervenes to prevent sharp fluctuations. The exchange rate has remained stable since 2015 at around 540 Colones / 1 USD. The Central Bank announced earlier this year that it plans to continue building its foreign exchange reserves by adding \$1 billion to reserves in the period January 2016 – December 2017 and is forecasting a 4.2 percent growth in GDP in 2016.

Total U.S. agricultural exports totaled \$658.9 million in 2015. Top U.S. agricultural exports by major category were bulk products \$300 million; intermediate products \$101 million; consumer-oriented products \$249.6 million; and agricultural related products \$8.4 million. The United States is Costa Rica's major supplier of corn, wheat, soybeans, and consumer-oriented products. There are also other products that continue to experience growth, including beef, fresh fruits, processed vegetables, wine, beer and pet food. Costa Rica does not produce bulk commodities, with the exception of rice and black beans. It relies upon imports to satisfy 100 percent of the consumption of wheat, yellow corn, and soybeans in the milling, crushing, chicken, pork, and dairy industries. Significant imports of rice and dried beans are necessary to meet local demand as well.

With such a high degree of trade, especially with the United States, Costa Rican importers are well accustomed to working with foreign partners in this market. Many business people in Costa Rica are bilingual, thus, are able to facilitate business negotiations with Americans. However, the business culture in Costa Rica can be less fast-paced than in the United States and those wishing to do business in here should be prepared for this cultural difference. U.S. exporters should also note that export procedures and processes in Costa Rica go through many levels of bureaucracy that can, at times, slow the importation process for food products.

Credit is available to producers primarily from commercial banks both public and private. Of total credit available from the banking sector, 2.7 percent was used in the agricultural sector in calendar year 2014, down from 3.7 percent during 2013.

Table 1. Costa Rica: Advantages and Challenges for U.S. Exporters

Advantages	Weaknesses
The United States is close to Costa Rica, which gives logistical advantages for marketing and trade.	U.S. products from the Western United States and the Upper Midwest face higher transportation costs relative to alternate suppliers from the rest of Central America.
U.S. exporters can supply different volumes according to local demand and maintain reliable supply throughout the year.	Low volume shipments of high-value products face additional costs since they must go through freight consolidators in Miami or other ports.
The United States now enjoys lower duties in almost every agricultural product as a result of CAFTA-DR.	U.S. food exporters are not geared to meet the needs of the “traditional” market (13,000 mom & pop’s), which sell items packaged in small sizes.
Costa Rican importers, distributors and retailers like U.S. business style and practices.	U.S. exporters generally do not give price discounts due to relatively small size of orders from Costa Rican customers, and little or no marketing/promotional support.
U.S. products have high-quality marketing presentation, making them more desirable to consumers.	Many U.S. exporters are unaware that an Apostille can serve to validate the Certificate of Free Sale.
U.S. food products are competitive in terms of price and quality.	Importers are concerned about chalky kernels in U.S. rice.
In November 2013, Costa Rica initiated a new on-line product registration system, which eventually will reduce registration times for new imported products.	Costa Rica’s bureaucracy can create problems for importers.
With CAFTA, Costa Rica recognized the equivalence of the U.S. meat and poultry inspection systems, eliminating the need for approval of individual plants.	A vocal anti-GMO lobby threatens consumer acceptance of foods made with GM events.
A strong tourism sector (residential and traditional) provides opportunity to develop hotel/restaurant/institutional (HRI) sector sales. There are more high-	Free trade agreements with China, Colombia, Peru and the EU will increase competition from those exporters.

end grocery stores in tourist areas outside the San Jose metropolitan area.	
Retailers are interested in carrying more U.S. products, including private-labeled goods.	The Ministry of Health has specific requirements for the wording of Certificates of Free Sale. Failure to meet these requirements slows down product registration.
Ministry of Agriculture will build new cold chain facilities in tourist areas which will facilitate imports of perishables, chilled and frozen foods.	South American grain competes aggressively with U.S. grain on price and quality.
Numerous multinational companies have their regional headquarters in Costa Rica.	Chinese black beans compete with U.S. beans in price because of a Chinese TRQ.
Costa Ricans are beginning to consume higher quantities of frozen/prepared foods.	
Costa Rica is not self-sufficient in basic commodities and depends on imported grains and legumes.	
Costa Rica generally supports science-based international standards, and participates in international standards setting bodies.	
Consumers trust the quality of U.S. food products and follow U.S. market trends.	
A large percentage of the Costa Rican population is urban (roughly 60 percent), and of that a large share has a high disposable income (2013 income per capita of \$10,528).	

II. EXPORTER BUSINESS TIPS

Local Business Customs:

Generally, business negotiations in Costa Rica tend to proceed slower than in the United States. Below are some important characteristics that should be noted:

- Credit terms: 3 to 4 months can pass between the time the importer places an order to an exporter to the time they collect payment from retailers.
- Knowledge of Spanish and some historical national moments are viewed positively.
- Spanish language in printed materials is preferred, although most Costa Ricans in the business

sector are bilingual.

- A personalized approach to business with consistent attention to service and delivery, frequent visits, and follow-ups, goes far in Costa Rica.
- Navigation of Costa Rica's import procedures can be tricky; work with experienced representatives, agents, and importers, there are many in the country.
- Trademark registration and protection is important.
- Contracts should be in writing and made through consulting top decision-makers.
- Display samples and volume flexibility in orders aid business dealings.

General Consumer Tastes and Preferences

Traditional foods such as rice and beans remain staples in the Costa Rican diet, though new foods are readily accepted by the population. Costa Rica, for example, is the only country in the region where prepared foods account for a significant portion of household food budgets. Beef, rice, breads, and vegetables are typically the largest food expenditures for Costa Rican consumers. Soft drinks and dairy products follow these items in household purchases, with milk being consumed more than cheese. In general, pork and fish are consumed less than other protein sources. Wheat and corn products are widely consumed by the general population but are consumed in greater quantities by urban residents than other populations.

Some differences exist in the purchasing habits of consumers based on location. Rural consumers, for example, consume mostly rice, beef, vegetables and sugar while urban residents tend to demand beef, bread, vegetables, and soft drinks. Urban consumers are more likely to eat more chicken and other meats than their rural counterparts. Furthermore, urban residents tend to be more health conscious in their dietary habits and also consume more prepared meals than other segments of the population. The upper and mid-upper classes are the target of most U.S. consumer-oriented products, with these classes being both familiar and receptive to U.S. food and culture. These classes are apt to own microwaves and freezers and purchase food products accordingly. Higher socio-economic classes also tend to be the primary clients of supermarkets and fast food restaurants.

Dining out is common for high and middle income classes but is usually reserved for weekends or for special celebrations. Lower income consumers cook and eat most meals within the home and seldom dine in fine restaurants, but sometimes eat in fast food restaurants or cafeterias. Good quality items are not overlooked by these consumers, but price is the most significant factor in household food preferences. Overall, lower-income customers spend less on food than wealthier consumers, but shop more frequently. The presence of food trucks has developed within the past few years as well. Close to 20 companies are now using food trucks to sell their products all over the country. According to the Food Trucks Association, the operating expenses of food trucks is, on average, 40 percent less compared to the expenses of established restaurants.

A new trend in relation to environmentally friendly packaging alternatives is expected to increase in the future, mainly as the result of heightened awareness about material sourcing and the impact this has on the environment. A broader base of players is likely to promote recycling and reutilization campaigns.

Food Standards and Regulations

Codex Alimentarius norms serve as the basis for Costa Rica's food regulations. Within Costa Rica, four official entities are responsible for the regulation of food imports, including:

- Ministry of Health's Registration and Control Department (Ministerio de Salud, Dirección de Registros y Controles) – handles processed foods and beverages.
- Plant and Animal Health Service (Servicio Fitosanitario y Dirección de Salud Animal) – handles bulk agriculture, fresh fruits and vegetables and other products of fresh fruit/vegetable origin, ornamental plants, fresh, chilled or frozen meat products.
- National Animal Health Service (Servicio Nacional de Salud Animal) – handles live animals, products of animal origin - fresh meat and meat products, milk, cheese, eggs etc., pet food, animal feed, and ingredients for pet/animal food.
- Customs Office (Dirección General de Aduanas) – handles procedures for taxation purposes.

General Import and Inspection Procedures

Product Registration

Imported food products must be registered prior to importation at the Ministry of Health's Registration and Control Department (Ministerio de Salud, Dirección de Registros y Controles). Registration is valid for five years and products are usually registered by importers. However, once a product is registered it may be imported by a company other than the one which originally registered it. For this reason, importers sometimes ask suppliers to share in the costs for the registration process. If a company wants to import a product that has already been registered, the company must still pay the full registration fee, which is currently set at \$100 per product.

The Ministry of Health implemented a new digital registration process for products under its supervision, including drugs, processed food products, cosmetics, bio-medical equipment, and natural products. The implementation of the new system has proceeded in stages, starting with drugs during October and November of 2013. Processed food products began registration using the new system during November and December of 2013. Registration, renovation, and post-registration changes are now completed using the new system. The new system has several goals, such as reducing the number of pending registration requests, reducing the waiting time to obtain approval of an application, standardizing the procedures, and eliminating paperwork. The new system operates with a digital signature and digital copies of the required documentation. The required documentation is the same as before (please see below), although the time required to obtain approval is expected to be reduced. However, the private sector occasionally reports problems and delays as the number of applications for registration continues to increase over time. According to importers, although the digital system has accomplished the stated goal of simplification, the bottleneck continues to be the lack of sufficient personnel at the Ministry, who ultimately have to review the applications. Additional information regarding the registration system may be obtained by visiting the following website:

www.registrello.go.cr

For more details regarding the registration process, please see Costa Rica's [FAIRS Country Report](#).

III. MARKET SECTOR STRUCTURE AND TRENDS

A. Retail Food Sector

Costa Rican supermarkets chains have an optimistic outlook for 2016 and are interested in continuing expanding their investments in 2017 and beyond. The Business Group of Supermarkets (Gessa), Walmart, and Automercado, are some of the firms that will increase their coverage in spite of the increasingly competitive nature of the Costa Rican market. Today, approximately 40 percent of food purchases made within the country take place in modern supermarket formats. Convenience stores and “mini-supers” (also known locally as “pulperias”), which are small local stores offering a limited selection of basic goods, are also commonly frequented by local consumers, especially to supplement weekly purchases. Traditional outdoor markets, of which there are estimated to be around 13,000 in the country, remain popular in Costa Rica as well.

The supermarket format has been gaining prominence in recent years and there are now more than 350 supermarkets in Costa Rica. This figure is growing rapidly as the large supermarket chains routinely open new stores. Urban areas contain the majority of supermarkets but they are gaining ground in rural settings as well. As retail supermarkets expand their reach and consumer base, they present an excellent opportunity for U.S. exporters of food, beverages and agricultural products. Market analysts inform that already 55 percent of all food products sold in supermarkets are imported from abroad with 32 percent of these imports being from the United States. There are five major supermarket chains in Costa Rica including Wal-Mart (United States), Gessa (Costa Rica), AutoMercado (Costa Rica), Price Smart (United States), and Megasuper (Colombia). Wal-Mart, according to its own 2016 data, now has 185 stores - owning more than 80 percent of all the supermarkets in Costa Rica.

Middle to high-income client is the target consumer of many supermarket chains, but price remains an important factor in consumer purchasing decisions. Several budget and discount-oriented retail outlets exist in Costa Rica. Due to increased competition between supermarket chains created from the growing number and format of supermarkets, retailers strive to offer high-quality products, diversify their product range, and offer in-store services. In particular, this has resulted in the growth of prepared foods sold in stores. This trend has coincided with a rise in demand for convenience foods, including healthy convenient food options, which are now popular with consumers. High-end and budget supermarkets and mini-supers alike are looking to target this niche.

Some food distribution firms can provide entry into both retail outlets and to the food service sector. Entry into smaller retailers is best accomplished through working with local distributors.

Hotel, Restaurants and Institutions

Hotels and Resorts: Hotels and Resorts in Costa Rica offer a wide range of accommodations for the growing business and tourist industries. The government is developing a comprehensive travel and tourism plan with a special emphasis on cultural and eco-tourism. It is also implementing aggressive marketing campaigns in the United States and Europe. However facilities and basic infrastructure still need to be significant attention to truly be able to attract large scale tourism. From the 9.6 million tourists who visited Costa Rica over the past five years, almost 700,000 preferred lodging options available through platforms such as Airbnb or HomeAway instead of hotels, especially in the Pacific Northwest (Guanacaste) region. Projections made by the Central Bank of Costa Rica indicate that 2016 will generate \$2,893,000 in revenue from tourism and by 2017 this amount will reach \$3,161,000.

Restaurants: Costa Rica’s restaurant sector, specifically fast-food establishments, showed improvement in the number of openings in the second half of 2015 and grew by 5 percent in 2016. In

general, most of the finest restaurants are located in the San Jose metropolitan area. In recent years, neighborhoods east of San Jose have become attractive places for gourmet cooking establishments such as in old neighborhoods of Amon, Otoya, Aranjuez, Dent, Los Yoses and Escalante. More than eighty restaurants are located within the 2 square kilometers represented by the neighborhoods mentioned. A new gastronomy center is expected to open in the province of Cartago soon having received an investment of \$3 million.

Restaurants in Costa Rica can be broken down in the following segments:

- Fine-Dining/ Full service restaurants: higher priced
- Casual Dining: higher to medium priced dining
- Fast food casual dining: cafes, bars affordable and fast food
- Mobile fast food kiosks and trucks: this type of fast casual food is being more and more common in local trade shows and events.

The non-fast food restaurant subsector is experiencing rapid growth and is primarily frequented by professionals. New, upscale and specialized restaurants serving both local and continental cuisines are springing up in the major urban centers as well. There are no statistics as to the current number of restaurants to date but, due to increased tourism, immigration, and the sophisticated dining tastes of the Costa Rican middle and high income population, the selection of restaurants is ample with cuisine specialties such as Argentinian, Colombian, Chinese, Spanish, Mediterranean, Italian, Indian, Japanese, and Mexican.

In the Pacific Northwest tourist hub of Guanacaste, restaurants offer various gastronomic options. Costa Rican cuisine generally includes lightly seasoned fresh fish, chicken or beef, grilled plantains and a combination of black beans and rice called *Gallo Pinto*. The growth in restaurant operations in Costa Rica offers U.S. exporters the opportunity to supply the many international franchises in the San Jose area.

Expanding franchises include the sports bar chain Hooters which has six restaurants with a total investment of \$3.3 million, Hooligan's which also has six locations, and Chili's which is expected to invest \$2.4 million in two new locations, bringing the total number to five. The local chain "RostiPollos" is also in the process of expanding its presence throughout the country by investing \$1 million to open new restaurants.

Fast Food/Franchises: The fast food market is very competitive in Costa Rica. Approximately 244 new fast food locations were opened from 2010-2014, totaling 679 such restaurants since 1962. Costa Rica's franchising regime grew by 85 percent in the last 5 years according to the National Franchise Center. A total of 34 new franchises launched operations last year with 22 of them representing international chains. Almost 64 percent of the restaurants are located in the San Jose metropolitan area.

Costa Rica experienced several closures in recent years, such as Burger King and Wendy's, but the industry seems to be stable with new franchises have opened within past two years. The U.S. burger chain Johnny Rockets confirmed the opening of three new locations for a total investment of \$2 million. KFC will open a new restaurant in the area of Desamparados, south of the capital. This will be the chain's 33rd location in the country. Taco Bell opened two new restaurants and is expected to open two more in the near future.

Franchising was spurred by the rise of tourism in Costa Rica. Currently, the market for new franchises has been intensifying even with some market saturation primarily in the fast food sector. One strategy used by franchises to keep local consumers is to tropicalize their menus by offering fried eggs, *Gallo Pinto* and a pair of tortillas in combos.

IV. BEST CONSUMER-ORIENTED PRODUCT PROSPECTS

Many promising export opportunities exist for high-value consumer products from the United States. The signing of CAFTA-DR in 2009 cleared the way for U.S. exports to enter Costa Rica with ease, and since then, U.S. exports have grown robustly. The economic outlook in Costa Rica is promising as well; economic growth is steady and a solid base of middle to upper-class consumers is expanding in the country. Additionally, U.S. food products and food companies continue to permeate the market in Costa Rica as local consumers are both receptive and accustomed to U.S. food products. American food companies, restaurants, and supermarket chains, have been highly successful in Costa Rica and have a strong presence in the country.

Snack foods continue to gain popularity and exhibit positive consumption trends. In particular, bakery and confectionary products are showing impressive levels of growth as are savory chips and snacks. Competition in the snack food market is present from Mexico and Guatemala as well as from domestic production. However, domestic production of snack foods, particularly of confectionary goods, also presents opportunities for U.S. exporters of food ingredients. Baking ingredients, shelled nuts, and intermediate cocoa products have all experienced over 90 percent growth by value from 2010 to 2014. Domestically produced snack foods are widely distributed throughout the country but are consumed principally by middle to lower-income consumers. Imported snack foods, in contrast, are targeted most directly at higher-income customers, and while they too enjoy wide distribution throughout the country, are found mainly in supermarkets and larger retail outlets.

Table 2. Costa Rica: Sales of Packaged Food by Category: Value 2011-2016

CRC billion	2011	2012	2013	2014	2015	2016
Baby Food	10.84	11.52	12.63	13.83	14.80	15.94
Baked Goods	224.93	244.00	265.48	288.03	305.76	327.28
Breakfast Cereals	19.58	21.72	24.16	26.69	28.79	31.30
Confectionery	46.61	50.61	56.29	62.15	66.90	72.52
Dairy	258.90	279.25	301.81	324.58	341.42	362.61
Edible Oils	32.73	34.83	37.60	40.68	43.09	46.07
Ice Cream and Frozen Desserts	44.79	49.00	53.72	58.48	62.27	67.00
Processed Fruit and Vegetables	15.86	17.26	19.16	21.08	22.73	24.78
Processed Meat and Seafood	156.79	171.62	187.74	203.12	213.41	226.39
Ready Meals	2.00	2.20	2.43	2.67	2.87	3.12
Rice, Pasta and Noodles	147.67	156.73	166.74	177.22	184.56	194.44
Sauces, Dressings and Condiments	51.57	55.06	58.97	63.03	65.91	69.60
Savory Snacks	62.74	68.17	74.02	80.12	84.84	90.73
Soup	7.91	8.63	9.42	10.27	10.91	11.70
Spreads	6.54	7.12	7.77	8.44	8.95	9.59
Sweet Biscuits, Snack Bars and Fruit Snacks	46.46	50.41	54.60	58.91	62.11	66.08

Packaged Food	1,135.92	1,228.11	1,332.56	1,439.31	1,519.32	1,619.15
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Source: Euromonitor International

Demand for healthy, and/or gourmet snack items is increasing as well. Snacks with natural ingredients, dried fruits, whole wheat, and high-quality ingredients are gaining ground with health conscious consumers. This trend for healthy products is not limited to snack foods either; demand for niche food items such as organic shelf products or gluten-free goods is expanding, which bodes well for U.S. exporters wishing to capitalize on this trend.

Meat exports to Costa Rica demonstrate excellent new opportunities for U.S. exporters as well. Pork products stand out as having great export potential; bacon, ham, and pork leg (especially during the winter months) are all popular imports at the moment. Exports of processed meats, prepared meats, and preserved meats between 2012 and 2014 expanded significantly, and consumption of prepared meats continues to grow. From a report issued by the Chamber of Importers of Costa Rica imports were distributed in 2015 in 30 commercial and industrial sectors. The industrial sector accounted for 92.9 percent of total imports; however, it experienced a 4 percent decrease compared to 2014.

The livestock sector accounted for 1.7 percent of total imports in 2015, and showed an increase of 30 percent compared to 2014. There was a noteworthy increase in purchases of frozen meat, both pork and beef as well as fresh or chilled meat, deboned beef, and sardines. These products are mainly purchased in the United States, Nicaragua and Panama, together making up 62.6 percent of imports.

Table 3. Sales of Processed Meat and Seafood by Category: Value 2011-2016

CRC billion	2011	2012	2013	2014	2015	2016
Processed Meat	97.34	107.01	117.51	127.22	133.36	140.63
- Shelf Stable Meat	1.11	1.20	1.29	1.39	1.48	1.59
- Chilled Processed Meat	83.07	91.16	100.19	108.40	113.39	119.24
- Frozen Processed Meat	13.16	14.65	16.04	17.44	18.48	19.80
Processed Seafood	59.45	64.61	70.23	75.90	80.06	85.76
- Shelf Stable Seafood	58.24	63.30	68.82	74.37	78.45	84.05
- Chilled Processed Seafood	0.36	0.39	0.43	0.46	0.48	0.52
- Frozen Processed Seafood	0.85	0.92	0.99	1.07	1.13	1.20
Meat Substitutes	-	-	-	-	-	-
- Chilled Meat Substitutes	-	-	-	-	-	-
- Frozen Meat Substitutes	-	-	-	-	-	-
- Shelf Stable Meat Substitutes	-	-	-	-	-	-
Processed Meat and Seafood	156.79	171.62	187.74	203.12	213.41	226.39

Source: Euromonitor International

Exports of dairy products, notably cheese and yogurt, are growing quickly and present superb export potential. Yogurt especially is gaining favor amongst Costa Rican consumers and imports of U.S. yogurt are high; room exists in the market for new brands, including specialty varieties such as Greek yogurt. The figures presented in the National Dairy Congress in Costa Rica, held in October, indicate that demand for dairy products grew at a rate of 6.5 percent last year, driven by increased demand for products such as yogurt in its different presentations, milk formula and cheese, among things. The National Chamber of Milk Producers reported 202 liters of milk consumed per person per year; this demand in the region is surpassed only by Argentina and Uruguay. In the category of cheeses, which

also represents 10 percent of consumption, the format most consumed in Costa Rica is cream, with 30.1 percent of the total, although it fell slightly from the 30.6 percent stake held the previous year.

Remaining export sectors with impressive levels of growth include breakfast cereals, pet food and wine and beer. Pet food exports to Costa Rica are expected to continue to grow. Many established U.S. pet food importers are present in Costa Rica and consumers there are increasingly willing to spend more on pet food products as income level in the country rises. Costa Rican pet food manufacturers also import a high percentage of their ingredients directly from the U.S., representing yet another potential market for U.S. entry. Wine and beer imports have also been making a splash in Costa Rica. The Costa Rican public is particularly receptive to world-wide beers, which though a small percentage of the market, have rapidly been gaining visibility in recent years. Costa Rican beer importers continue to seek high-value high-quality U.S. beers for introduction to the public at large.

Table 4. Costa Rica: Suggested Best Prospects for U.S. Exporters, by Sector, 2015

Product Category	2015 Imports In Million USD	5-yr. Avg. Annual Import Growth	Market attractiveness for USA
Soybean	107.3	66.8%	Costa Rica
Ready to eat meals	28.7*	1.4%	Ready meals more popular due to the demand for convenient inexpensive foods.
Snacks	19.4	4%	Perceptions of “healthy eating” affect this category. Companies are including low-calorie or gluten-free and other varieties and using more dried fruits as ingredients.
Fresh Fruit	24.9*	18.2%	U.S. is always a good supplier of fresh seasonal fruits
Chocolate and Cacao Products	14.1*	14%	Growth demand segment.
Beef & Meat products	13.9	72%	HRI industry is growing and consumers are searching for more U.S. cuts in the local market.
Poultry Meat & Prods. (ex. eggs)	20.1	36%	HRI industry is growing.
Processed Vegetables	27.6*	6.1%	High quality products have demand for the Hotel and Restaurant sector.
Nuts	9.4*	34%	Supermarket and Retail food service always having demand for new products.
Condiments & Sauces	7.5*	18%	Good potential.
Wine & Beer	7.1*	77.8%	Wine and beer is growing in popularity. Consumer awareness and education creates a niche for this emerging opportunity.
Pet Food	19.3*	19.3%	Demand for high quality pet foods and supplies provide big potential for growth.

Source: U.S. Census Bureau Trade Data / Bico Report

* Denote Highest Export Levels Since at Least CY 1970

V. KEY CONTACTS, AND OTHER RELEVANT REPORTS

U.S. Embassy Commercial, Agricultural and Trade-Related Contacts

Department of Agriculture Foreign Agricultural Services (FAS)

Phone : (506) 2519-2285

Fax: (506) 2519-2097

Email: AgSanJose@fas.usda.gov

Website : www.fas.usda.gov

Department of Commerce – U.S. Foreign Commercial Service

Phone: (506) 2220-2454

Fax: (506) 2231-4783

Email: san.josecr.officebox@mail.doc.gov

Website: www.export.gov www.buyusa.gov

AMCHAM (Local American Chamber of Commerce)

Phone: (506) 2220-2200

Fax: (506) 2220-2300

Email: chamber@amcham.co.cr

Website : www.amcham.co.cr

Public Institutions

Ministerio de Salud (Ministry of Health)

Dirección Atención al Cliente

Phone: (506) 2222-5749

Website: www.netsalud.sa.cr

Ministerio de Agricultura y Ganadería (Ministry of Agriculture)

Phone: (506) 2290-5463

Fax : (506) 2231-2062

Website: www.mag.go.cr

Servicio Fitosanitario (Plant and Animal Health Services)

Phone: (506) 2260-8300

Website: <http://www.sfe.go.cr/>

Servicio Nacional de Salud Animal (National Animal Health Service)

Phone: (506) 2260-8300

Email: info@senasa.go.cr

Website: <http://www.senasa.go.cr/senasa/sitio/>

APPENDIX - STATISTICS

TABLE A. COSTA RICA: KEY TRADE & DEMOGRAPHIC INFORMATION

Agricultural Imports From All Countries (\$Mil) ^{1/}	686.22
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Total Population (Millions) / Annual Growth Rate (%)	4.8 Million / 4.78%
Number of Major Metropolitan Areas	1
Size of the Middle Class (Millions) ^{2/}	2.5 Million
Per Capita Gross Domestic Product (U.S. Dollars)	2.8%
Unemployment Rate (%)	9.6%
Per Capita Expenditures (U.S. Dollars) ^{3/}	7,543
Percent of Female Population Employed ^{4/}	38.6%
Exchange Rate (1 US\$) ^{5/}	US\$ 1.00 = 550 colones

Footnotes

Data Year 2015

1/ Reported by Crecex <http://www.crecex.com/costaricaimporta/2015/capitulo-01sectoragricola.html>

2/ Reported by the World Bank <http://data.worldbank.org/country/costa-rica>

3/ Reported by Euromonitor <http://www.portal.euromonitor.com/portal/analysis/tab>

4/ Reported by the National Statistics Census <http://www.inec.go.cr>

5/ Reported Central Bank: <http://indicadoreseconomicos.bcr.fi.cr/indicadoreseconomicos>

Table B. Costa Rica: Principal Trade Partners 2015

COUNTRY	Value FOB (In Million USD)
United States	3,877
Panama	575
Nicaragua	549
Guatemala	540
The Netherlands	440

Source: Procomer

Costa Rica was the United States' 47th largest supplier of goods imports in 2015. the U.S. trade balance with Costa Rica shifted from a goods trade deficit of \$2.5 billion in 2014 to a goods trade surplus of \$1.7 billion in 2015.

Table C. Costa Rica: U.S. Exports of Processed Meats/Seafood, in Thousand USD

PRODUCTS	2010	2011	2012	2013	2014	2015	% Change
Prepared / Preserved Meats	2,958	4,626	6,108	8,981	11,371	12,982*	14.17%
Prepared / Preserved Seafood	1,479	1,744	1,911	1,764	2,148*	1,512	-29.62%

Source: U.S. Census Bureau Trade Data

**The definition of "processed food" used in this table includes products that go beyond what USDA classifies as agricultural products. They are provided here as a convenience to the food industry and the public.*