



Euromonitor
International

Coffee in Costa Rica

December 2025

Table of Contents

Coffee in Costa Rica - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers highly discerning

INDUSTRY PERFORMANCE

Significant value growth, due to soaring prices of coffee

Fresh ground coffee registers highest value growth

WHAT'S NEXT

Positive outlook over forecast period

Continuing growth for fresh ground coffee pods

Local heritage gaining further importance

COMPETITIVE LANDSCAPE

Cía Numar retains commanding lead

Smaller player, Café Dorado, gains most value share

CHANNELS

Supermarkets lead, while warehouse clubs gains most value share

Foodservice channel also significant

CATEGORY DATA

Table 1 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 2 - Retail Sales of Coffee by Category: Value 2020-2025

Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 6 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 7 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 8 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 9 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 10 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Hot Drinks in Costa Rica - Industry Overview

EXECUTIVE SUMMARY

Coffee negatively impacted by surging prices

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Muted overall volume growth, as rising prices have an impact

Local provenance increasingly important in coffee, with premiumisation also driving value growth

Consumers look for functional benefits in tea

WHAT'S NEXT?

Continuing growth, supported by growing economy

Price rises and premiumisation drive value growth in coffee

Health and wellness key driver for tea

COMPETITIVE LANDSCAPE

Coffee player Cia Numar holds on to commanding lead

Smaller coffee player, Café Dorado, gains most value share

CHANNELS

Supermarkets continue to lead distribution

Warehouse clubs gain most value share

Foodservice vs retail split

CATEGORY DATA

Table 11 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 13 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 14 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 15 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 16 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 17 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 18 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 19 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 20 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 21 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 22 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 23 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 24 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 25 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 26 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 28 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 29 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 30 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 32 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 34 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 35 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.

- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/coffee-in-costa-rica/report.