



Euromonitor  
International

# Staple Foods in Costa Rica

November 2025

Table of Contents

## Staple Foods in Costa Rica

### EXECUTIVE SUMMARY

With budgets stretched, consumers remain highly price conscious

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Consumer Price Index (IPC) shows a decline in prices for several categories

Impact of declining tourism and contraband

Health and wellness driving demand for better-for-you products

Influence of social media and convenience

#### WHAT'S NEXT?

Increased interest in healthy and functional foods

Global flavours to gain traction

Rising influence of social media

#### COMPETITIVE LANDSCAPE

Consumers appreciate the freshness of artisanal products

Cía Numar SA benefits from its widely recognised and trusted brands

#### CHANNELS

Supermarkets lead, offering a wide product range, lower prices and convenience

Convenient e-commerce's penetration continues to grow

Low prices attract

#### MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2021-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

## Baked Goods in Costa Rica

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Artisanal baked goods becoming increasingly specialised, but consumers continue to value the convenience of packaged options

#### INDUSTRY PERFORMANCE

Packaged options compete with fresh/unpackaged varieties

Packaged leavened bread's growth supported by consumer demand for convenience

## WHAT'S NEXT?

Low-priced, private label products will continue to attract consumers

Higher-income consumers will look for cleaner alternatives in packaged baked goods

Packaged options for more artisanal burger and hotdog buns could gain popularity

## COMPETITIVE LANDSCAPE

Bimbo de Costa Rica SA leads, catering to diverse consumer preferences

## CHANNELS

Supermarkets provide a convenient one-stop shopping experience and lower prices

Ongoing expansion of retail e-commerce as consumers value convenience

## CATEGORY DATA

Table 13 - Sales of Baked Goods by Category: Volume 2020-2025

Table 14 - Sales of Baked Goods by Category: Value 2020-2025

Table 15 - Sales of Baked Goods by Category: % Volume Growth 2020-2025

Table 16 - Sales of Baked Goods by Category: % Value Growth 2020-2025

Table 17 - Sales of Pastries by Type: % Value 2020-2025

Table 18 - NBO Company Shares of Baked Goods: % Value 2021-2025

Table 19 - LBN Brand Shares of Baked Goods: % Value 2022-2025

Table 20 - Distribution of Baked Goods by Format: % Value 2020-2025

Table 21 - Forecast Sales of Baked Goods by Category: Volume 2025-2030

Table 22 - Forecast Sales of Baked Goods by Category: Value 2025-2030

Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2025-2030

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Breakfast Cereals in Costa Rica](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Waning demand as consumers switch to alternative products

## INDUSTRY PERFORMANCE

Breakfast cereals are seeking to regain their appeal

Muesli and granola are capturing consumer attention

## WHAT'S NEXT?

Expansion of convenient and creative packaging options could drive growth

Simpler ingredients expected in the better-for-you space

Functional ingredients could attract consumers

## COMPETITIVE LANDSCAPE

Alimentos Jacks de Centro América celebrates its 61st anniversary

Offering affordable cereal options drives strong growth of Alimentos Jacks in 2025

## CHANNELS

Supermarkets offer a wide variety of imported and local breakfast cereals

Expansion of e-commerce

## CATEGORY DATA

Table 25 - Sales of Breakfast Cereals by Category: Volume 2020-2025  
Table 26 - Sales of Breakfast Cereals by Category: Value 2020-2025  
Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2020-2025  
Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2020-2025  
Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2021-2025  
Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2022-2025  
Table 31 - Distribution of Breakfast Cereals by Format: % Value 2020-2025  
Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2025-2030  
Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2025-2030  
Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2025-2030  
Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### [Processed Fruit and Vegetables in Costa Rica](#)

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Increased product variety and convenience trend fuel growth

##### INDUSTRY PERFORMANCE

Expansion of shelf stable options and consumer demand for convenience drive growth  
Shelf stable beans popular in meals and as a snack

##### WHAT'S NEXT?

Private label to increase its offering  
Growth of organic, preservative-free options  
Processed fruit and vegetables could offer varieties that are not available in the country fresh

##### COMPETITIVE LANDSCAPE

Leading Distribuidora Lucema SA offers a wide selection of canned fruit and vegetables  
Supermarkets remain the leading distribution channel  
E-commerce expands as consumers have grown more confident in online shopping

#### CATEGORY DATA

Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2020-2025  
Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2020-2025  
Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2020-2025  
Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2020-2025  
Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2020-2025  
Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2021-2025  
Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2022-2025  
Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2020-2025  
Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2025-2030  
Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2025-2030  
Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2025-2030  
Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### [Processed Meat, Seafood and Alternatives To Meat in Costa Rica](#)

#### KEY DATA FINDINGS

## 2025 DEVELOPMENTS

Ongoing popularity of chilled processed red meat

## INDUSTRY PERFORMANCE

Processed meat, seafood and alternatives continue to grow as consumers search for protein

Health and wellness trend encourages higher-income consumers to eat more fish

## WHAT'S NEXT?

Private label expansion

Simpler ingredients lists are sought after for plant-based alternatives

Growth of international products

## COMPETITIVE LANDSCAPE

Cargill's broad portfolio and well-known brands support its lead in 2025

Dynamic Centro Internacional de Inversiones

## CHANNELS

Supermarkets have a wider selection of brands and presentations

Consumers value the convenience of e-commerce

## CATEGORY DATA

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

## COUNTRY REPORTS DISCLAIMER

[Rice, Pasta and Noodles in Costa Rica](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Affordable and filling pasta, rice, and noodles are essential items amid ongoing financial pressure

### INDUSTRY PERFORMANCE

Rice, pasta and noodles benefits from consumers seeking affordable options

Noodles offer convenience and diversity

### WHAT'S NEXT?

More product variety expected to continue to attract consumers

Expansion of organic and clean-label offerings

More affordable specialty products would attract consumers

### COMPETITIVE LANDSCAPE

Leading Grupo Pelón distributes a wide variety of well-known brands  
VIGUI continues to innovate and diversify its product line

## CHANNELS

Small local grocers lead, benefiting from a widespread presence in the country  
E-commerce continues to expand among consumers who value convenience

## CATEGORY DATA

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2020-2025  
Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2020-2025  
Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2020-2025  
Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2020-2025  
Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2020-2025  
Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2021-2025  
Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2022-2025  
Table 69 - NBO Company Shares of Rice: % Value 2021-2025  
Table 70 - LBN Brand Shares of Rice: % Value 2022-2025  
Table 71 - NBO Company Shares of Pasta: % Value 2021-2025  
Table 72 - LBN Brand Shares of Pasta: % Value 2022-2025  
Table 73 - NBO Company Shares of Noodles: % Value 2021-2025  
Table 74 - LBN Brand Shares of Noodles: % Value 2022-2025  
Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2020-2025  
Table 76 - Distribution of Rice by Format: % Value 2020-2025  
Table 77 - Distribution of Pasta by Format: % Value 2020-2025  
Table 78 - Distribution of Noodles by Format: % Value 2020-2025  
Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2025-2030  
Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2025-2030  
Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2025-2030  
Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

### 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/staple-foods-in-costa-rica/report](https://www.euromonitor.com/staple-foods-in-costa-rica/report).