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**GAIN R**

## **Costa Rica**

### **Exporter Guide**

### **Report**

**Approved By:**

Erick Kuss, Ag. Counselor

**Prepared By:**

Ileana Ramirez, Marketing  
Spec.

**Report Highlights:**

Costa Rica is an extremely attractive market for U.S. exports. Costa Rica consumers are highly receptive to U.S. food brands and retailers, makes the country ripe for export potential. Beer, 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.

**Post:**

San Jose

**Executive Summary:****I. Market Overview****A. Business Customs and Trade**

Costa Rica has achieved a fairly high level of economic development, the highest in Central America, in part because of its economic growth since 1948 and invested in health, education and infrastructure. Economic activity is dominated by tourism, agriculture and services such as call centers are gaining economic weight.

Total U.S. agricultural exports totaled \$382 million in 2013. Top U.S. agricultural exports by major category were consumer-oriented products \$185; intermediate products \$90.7; and consumer-oriented products, \$209.5 (a record year); and agricultural products. The United States is Costa Rica's major supplier of corn, wheat, soybeans, and consumer foods, as reflected by high U.S. agricultural products.

Traditionally, coffee, banana, and pineapple have all been major export commodities of Costa Rica, with pineapple the second largest agricultural export. Other major agricultural exports of Costa Rica to the United States include meat and vegetables, sugar, and nursery products.

With such a high degree of trade, especially with the United States, Costa Rican importers are accustomed to international trade. Many business people in Costa Rica are bilingual and have some level of English, thus facilitating business negotiations. Business culture in Costa Rica can be less fast-paced than in the United States and those wishing to do business in the country should be aware of the possible difference. U.S. exporters should also be prepared to be patient with export procedures and processes; Costa Rican bureaucracy that can at times slow the importation of food products.

Given the country's small size (4.7 million population), future growth depends upon foreign investment and access to international markets. Total foreign direct investment in Costa Rica amounted to \$2.3 billion in 2013 and it is forecast to reach \$2.36 billion in 2014. The trade balance measured by exports and imports is expected to continue to increase during 2014. CIF imports amounted to \$17.5 billion in 2013, reached \$11,530 million in 2013. The deficit of the current account of the balance of payments is expected to remain slightly lower than in 2013 (5.1 percent). The local currency (the colón) has experienced a 14 percent devaluation since 2014. After remaining stable at around colones 500 per US\$ 1 for several years, the colon devaluated to 538/US\$. Previously, the export and tourism sectors had been complaining that a stronger colón was causing these sectors to suffer. A higher exchange rate, resulting in more expensive imported products, could result in lower import growth. The unemployment rate was 8.3 percent during the fourth quarter of 2013. Unemployment is an important concern of the population, according to a survey conducted in 2013.

**Agriculture in the Economy:**

In 2013, Costa Rica's agricultural sector represented 8.6 percent of GDP (approximately \$4.3 billion) and employed 1.2 million people in the workforce. Several agricultural sectors (including coffee, pineapples, sugar cane, bananas and citrus) are heavily dependent on exports, especially at harvest time. Central Bank data indicate that the agricultural sector GDP declined 0.1 percent in 2013 and in 2012. Agricultural sector GDP is forecast to increase 2.5 percent in 2014 driven by exports of agricultural products. The sector is well diversified and export oriented. Some key export products in 2013 were: bananas (\$828 million); pineapples (\$799 million); juices and fruit concentrates (\$181 million); palm oil (\$144 million); and ornamental plants (\$79 million). Data also show that of total agricultural GDP, agricultural crops' share was 76.1 percent of the total, followed by livestock and fisheries with the rest. Bananas, pineapples and coffee represented 49.2% of total agricultural GDP, followed by citrus fruits, sugar cane, and other agricultural products.

percent), beef cattle (4.1 percent), and sugarcane (3.3 percent). Most of the smaller sectors including beans, corn, pork, poultry and eggs, sell their production almost exclusively in the domestic market. Costa Rica does not produce, with the exception of rice and black beans. It relies upon imports to satisfy 100 percent of the consumption of wheat, yellow corn, flour, milling, crushing, chicken, pork, and dairy industries. Significant imports of rice and dried beans are necessary to

Credit is available to producers primarily from commercial banks both public and private. Of total credit available, an estimated 3.0% was used in the agricultural sector for calendar year 2012, down from 3.8% during 2011.

## **B. Economic and Demographic Overview**

Costa Rica's economy is fairly diversified with services, tourism, agriculture, and high technology being the dominant sectors. However, tourism remains important for the country which has an international reputation as a top destination for eco-tourism, national parks and biodiversity. As such, tourism provides a thriving market for US exports that cater to the tastes of international

Tourism suffered during the recession of 2009 which saw Costa Rica's GDP contract by 2.5 percent [Central Bank of Costa Rica]. However, the tourism industry is recovering and the economy has rebounded, showing signs of continued growth in 2013 [Central Bank of Costa Rica]. Unemployment percentages decreased in 2012 to 9.8 percent <http://www.inec.go.cr/Web/Home/Default.aspx>

Costa Ricans still enjoy the highest standard of living in Central America with a per capita income of about U.S. \$2,500 [Central Bank of Costa Rica]. Rising income is expected to generate increased demand for consumer goods, including high-value food products, creating a steady consumer base. Also, it is worth noting that the domestic consumer base consists of international immigrants. Americans represented 4 percent of immigrants to Costa Rica in 2012 according to the National Census, and the presence of American patriots in the country helps to fuel demand for American products in Costa Rica. Results from the National Population Census show that the Central Valley (the provinces of San Jose, Alajuela, Cartago, and Heredia) in Costa Rica constitutes the majority of the country, containing 73.9 percent of the population [National Census]. Overall, 72.8 percent of Costa Rica's population is employed, 19.1 percent living in poverty; in contrast 26 percent of rural residents live in poverty [National Census].

## **D. Advantages and Challenges in the Market Advantages (see attachment)**

### **II. Exporter Business Tips**

#### **A. Business Customs and Keys to Success**

- Business negotiations tend to proceed slower than in North American culture
  - Impatience is viewed poorly and may decrease credibility
    - Credit terms: 3 to 4 months can pass between the time the importer places an order to an invoice and 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 speak English.
    - A personalized approach to business with consistent attention to service and delivery, frequent communication, is valued far in Costa Rica.
    - Navigation of Costa Rica's import procedures can be tricky; work with experienced representatives. 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.

### A. Consumer Tastes and Preferences

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

Some differences do exist in the purchasing habits of consumers based on location. Rural consumers for example tend to consume more vegetables and sugar while urban residents tend to demand beef, bread, vegetables, and soft drinks. Urban consumers tend to consume more chicken and other meats than their rural counterparts. Further, urban residents tend to be more health conscious and 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 the primary consumers of U.S. food and culture. These classes are apt to own microwaves and freezers and purchase food products accordingly. The upper classes also tend to be the primary clients of supermarkets and fast food restaurants. However, though higher-income consumers consume the greatest quantities of fast food, they also consume the greatest quantities of health and diet foods. Dining out is popular but is usually reserved for weekends or special occasions.

Lower and middle class consumers cook and eat most meals within the home and seldom dine in fine restaurants, hotels, restaurants or cafeterias. Good quality items are not overlooked by these consumers, but price is the most significant factor in their preferences. Overall, lower-income customers spend less on food than wealthier consumers, but shop more frequently.

### C. Food Standards and Regulations [see Fairs Country Report-CR]

The international Codex Alimentarius norms serve as the basis for Costa Rica's food production and marketing regulations. 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 Control) – handles importation of foods and beverages.
- Plant and Animal Health Service (Servicio Fitosanitario y Dirección de Salud Animal) – handles bulk agricultural products, fruits, vegetables and other products of fresh fruit/vegetable origin, ornamental plants, fresh, chilled or frozen meat and fish.
- National Animal Health Service (Servicio Nacional de Salud Animal) – handles live animals, products of animal origin.

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.

#### **D. General Import and Inspection Procedures**

##### **1. Product Registration [Fairs Country Report – CR]**

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

According to the Ministry of Health's regulations, once all the required information is submitted, the Ministry of Health will process the registration. The Ministry of Health has five working days after all the required documentation is submitted to process the registration. However, because of the large number of registration requests, the registration process for food and beverages has taken several months to complete.

The Ministry of Health implemented a new digital registration process for products under its supervision, including food products, cosmetics, bio-medical equipment, and natural products. The implementation of the new system is done in stages. It started with drugs and in November of the same year, processed food products have started registering through this system. Post-registration changes are able to be completed using the new system. The new system has several goals, such as reducing pending registration requests, reducing the waiting time to obtain approval of an application, standardizing the paperwork. The new system is operating with a digital signature and digital copies of the required documentation. The process is the same as before (please see below), although the time required to obtain approval is expected to be reduced compared to the time required before the implementation of the new system. Additional information regarding the registration system can be found by visiting the following website:

<http://www.registrello.go.cr>

According to a government decree, for registration purposes, food products are classified as food products, additives, and nutraceuticals. According to the General Health Law, if a product claims to have health related benefits, the products will be classified as nutraceuticals and the registration process may be different from the described below.

To register a product, the following documents must be submitted:

- Registration request form: This form must be signed by the legal representative of the company.
- Free sale certificate issued by the health or other appropriate authority of the country of origin: This must indicate that the product is allowed for free sale and consumption in the country of origin. This document no longer requires a signature from the Costa Rican consul or countersigned by the Costa Rican Ministry of Foreign Relations. Since Costa Rica joined the Apostille, effective on December 14, 2011, the free sale certificate now only requires an Apostille issued in the U.S.



- Registration fee is \$100 per product.
2. Obtain Certificate of Free Sale issued by:
    - For wines and liquor: Department of the Treasury Alcohol and Tobacco Tax and Trade Bureau. For other Departments of Agriculture or State Departments of Health. For processed meat products, Costa Rica ac Certificate of Wholesomeness” as equivalent to the Free Sale Certificate.
    - Certificate must obtain an Apostille from a Department of State office of the State that issued the certificate.
  3. Send documentation to the importer.
  4. Importer submits documents to Ministry of Foreign Relations for Spanish translation.
  5. Importer contacts Customs Agent.
    - The importer provides the Customs Agent with the following documents: commercial invoice, bill of lading, the transportation means to be used, and copy of the importer’s identification document (passport, cedula, or the case of a business entity).
    - Customs Agent determines the type of import permits which are required and asks them on behalf of the importer (of origin, certificate of analysis, fisheries certificate, fumigation certificate, health certificate, phytosanitary certificate).
  6. After receiving necessary permits, Customs Agent completes a Customs Import Form to submit to the Customs to enter the country. Product may be subject to a random sampling physical inspection procedure upon arrival.
  7. Customs agent pays import duties.
  8. The product is cleared for market and the importer may retrieve the product.
  9. Product labels must be in Spanish and include: registration number given by Ministry, product name, list of ingredients, drained weight (in metric system), name and address of manufacturer and importer, country of origin, lot ID, date of production, instructions, and instructions for use, and any other information applicable to the specific product.

Other types of documentation:

- Airway Bill – Air freight shipments require airway bills, which can never be made in negotiable form. A bill of lading (i.e.) USPS, Fed-Ex, UPS, DHL, etc.)
- Bill of Lading – A contract between owner of the goods and the carrier. Two types of bills exist for vessels (non-negotiable) and a shipper’s order bill of lading (negotiable). The latter may be bought, sold, or traded.
- Commercial Invoice – A bill for the goods from the seller to the buyer. The invoices are used by the government to control the goods and determine custom duties. When using the invoices to control imports, governments specify the number of copies, language to be used, etc.
- Consular Invoice – Describes the shipment of goods and provides information including consigner, consignee, and value. Copies are available from the country’s consulate in the U.S.
- Export Packing List – May serve as a conforming document but is not a substitute for a commercial invoice. It includes shipper, invoice number, date of shipment, mode of transport, carrier, and itemizes quantity, description, and value.



“*pulperias*”) - which are small local stores offering a limited selection of basic goods, are also commonly frequented to supplement weekly purchases. Traditional markets, of which there are estimated to be around 13,000 in the country of Costa Rica as well.

Supermarkets have been gaining prominence in recent years and there are now over 350 [Retail Food Sector Report-CR]. Costa Rica with this figure growing annually as supermarket chains routinely open new stores. Urban areas contain the most supermarkets, but they are gaining ground in rural settings as well. As retail supermarkets expand their reach and consumer base, there is an opportunity for increased exports of agricultural products and processed foods; already 55 percent of food sold is imported, with 32 percent of these imports being from the U.S. [Retail Food Sector Report-CR]. Of supermarkets in Costa Rica, there are five major competitors based in a number of countries: Wal-Mart (United States), Gessa (Costa Rica), Jumbo (United States), Smart (United States), and Megasuper (Colombia), Fresh Market, AMPM convenient stores. Wal-Mart alone, by itself (and its stores), owned more than 80 percent of supermarkets in Costa Rica [Retail Food Sector Report-CR].

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

Principal import and food distribution firms that can provide entry into retail outlets and to the food service sector include Mayca/Sysco, and Pedro Oller; these firms are the primary source of imports for wholesalers, supermarkets, grocery stores. Entry into smaller retailers is best accomplished through working with local distributors.

#### **A. Hotel, Restaurants and Institutions**

Economic activity is dominated by tourism, agriculture and high technology, and services such as call centers are also significant. Costa Rica's GDP grew 3.5 percent in 2013 and its forecasting 3.8 percent growth for 2014 due to the activity in the tourism sector. It is hard to maintain its reputation as an international vacation destination and attracts many international tourists, 2.5 million in 2013. ([http://www.canatur.org/docs/Anuario\\_2013.pdf](http://www.canatur.org/docs/Anuario_2013.pdf))

Though tourists consume local foods, they have international tastes and often prefer foods and beverages that are familiar. North Americans and Europeans in particular flock to Costa Rica and bring with them a demand for international cuisines. They are responsible for a large segment of food and agricultural imports, with top imports in the HRI industry being seafood, vegetables, and pastas. The large majority of tourism within Costa Rica is aimed at coastal areas along the Pacific coast.

The Central Valley and the San Jose Metropolitan Area is home to the largest domestic consumption base and market in the country. While no official data currently exists on the number of restaurants in Costa Rica, their presence has been growing. Urban eateries show great diversity in their offerings and it is no longer difficult to encounter cuisines from around the world. Consumers in San Jose are also readily familiar with many restaurant franchises from the United States including Pizza Hut, Wendy's, Burger King, Popeye's, Cosi, Papa Johns, Nathan's, Mrs. Fields, PF Changs and Starbucks. These franchises are thriving and have plans to open new store locations. Additionally, six new restaurant chains based in the U.S. are expected to open in the capital in the upcoming year.

## A. The Food Processing Sector

Bakery production accounts for the largest percentage of processing firms in the food industry. Remaining non-sectors as: milling, meat and meat-product processing, fruit and vegetable processing, dairy goods, soft drinks and chocolate, fish and fish products, and seafood processing.

Trade agreements with the United States, Mexico, Canada, the Dominican Republic, Central America, Chile, Peru, and others have pushed Costa Rica's processed food industry to improve its competitiveness. The use of high-quality domestic agricultural products has advanced greatly, thus enhancing the food processing sector. Costa Rica's competitive industries include: coffee, meats. Recent strong growth has occurred for products such as fruit juice, salad dressing, palm oil, tubers, corn,

## IV. Best High-Value Products Prospects

Many promising export opportunities exist for high-value consumer products from the U.S. to Costa Rica. The SCAFTA agreement cleared the way for U.S. exports to enter Costa Rica with ease, and since then U.S. exports have grown robustly. Costa Rica is promising as well; economic growth is steady and a solid base of middle to upper-class consumers is expanding. Additionally, U.S. food products and food companies continue to permeate the market in Costa Rica as the Costa Ricans are accustomed to U.S. food products. American food companies, restaurants, and supermarket chains, have been established 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 confectionery products show impressive levels of growth as are savory chips and snacks. Competition in the snack food market is present from both imported and well as from domestic production [Global Trade Atlas]. However, domestic production of snack foods, particularly bakery products, presents opportunities for U.S. exporters of food ingredients. Baking inputs, shelled nuts, and intermediate cocoa products show over 90 percent growth by value from 2010 to 2013 [BICO]. Domestically produced snack foods are widely distributed but are consumed principally by middle to lower-income consumers. Imported snack foods, in contrast, are targeted at higher income customers, and while they too enjoy wide distribution throughout the country, are found mainly in supermarkets.

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

Meat exports to Costa Rica demonstrate excellent new opportunities for U.S. exporters as well. Pork products show great potential; bacon, ham, and pork leg (especially during the winter months) are all popular imports at the moment. Prepared meats, and preserved meats between 2012 and 2013 expanded significantly, and consumption of prepared meats. Furthermore, the import registration requirements for processed meats have newly been revised to reduce the number of products entering these products into Costa Rica; these revisions should facilitate future growth for U.S. exporters in this sector.

Exports of dairy products, notably cheese and yogurt, are growing quickly and present superb export potential. There is a strong favor amongst Costa Rican consumers and imports of U.S. yogurt are high; room exists in the market for new brands and varieties such as Greek yogurt.

Remaining export sectors with impressive levels of growth include breakfast cereals, pet food and wine and beer. These sectors are expected to continue to grow. Many established U.S. pet food importers are present in Costa Rica and consume

willing to spend more on pet food products as income level in the country rises. Costa Rican pet food manufacturers have been making a splash in Costa Rica. The Costa Rican public is particularly receptive to world-wide beers, which the market, have rapidly been gaining visibility in recent years. Costa Rican beer importers continue to seek high quality products for introduction to the public at large.

## **V. Key Contacts**

### **1. 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](http://www.fas.usda.gov)

Mr. Erich Kuss, Agricultural Counselor

Ms. Candice Bruce, Agricultural Attaché

Mr. Victor González, Agricultural Specialist

Ms. Ileana Ramírez, Agricultural Marketing Assistant

Department of Commerce – U.S. Commercial Service

Phone: (506) 2220-2454

Fax: (506) 2231-4783

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

Website: [www.export.gov](http://www.export.gov) [www.buyusa.gov](http://www.buyusa.gov)

Ms. Abby Daniell, Commercial Officer

Ms. Gabriela Lucke, Commercial Specialist

Mr. Roy Fernández, Commercial Specialist

U.S. Department of State – Economic Section

Fax: (506) 2519-2364

Website: [www.sanjose.usembassy.gov/economic](http://www.sanjose.usembassy.gov/economic)

Mr. Roy Perrin, Counselor for Political and Economic Affairs

### **2. AMCHAM (Local American Chamber of Commerce)**

Cámara Costarricense-Norteamericana de Comercio – AMCHAM (Costa Rican-American Chamber of Commerce)

Phone: (506) 2220-2200

Fax: (506) 2220-2300

Email: [chamber@amcham.co.cr](mailto:chamber@amcham.co.cr)

Website : [www.amcham.co.cr](http://www.amcham.co.cr)

### **3. Public Institutions**

Ministerio de Salud (Ministry of Health) Dirección Atención al Cliente

Phone: (506) 2222-5749

Email: [xarias@netsalud.sa.cr](mailto:xarias@netsalud.sa.cr)

Website: [www.netsalud.sa.cr](http://www.netsalud.sa.cr)

Eng. Xinia Arias Quirós, Director

4. Ministerio de Agricultura y Ganadería (Ministry of Agriculture)

Phone: (506) 2290-5463

Fax : (506) 2231-2062

Email: [sunii@mag.go.cr](mailto:sunii@mag.go.cr)

Website: [www.mag.go.cr](http://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](mailto:info@senasa.go.cr)

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

VI. Sources

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<http://www.bccr.fi.cr/>

3. Country Comercial Guide (CCG) Costa Rica <http://export.gov/costarica/doingbusinessincostarica/index.asp>

4. Instituto Nacional de Estadística y Censos (National Institute of Statistics and Census)

<http://www.inec.go.cr/Web/Home/pagPrincipal.aspx>

5. CIA World Factbook

<http://www.cia.gov/library/publications/the-world-factbook/geos/cs.html>

6. FAIRS Country Report, January 27, 2012

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11. Global Trade Atlas (GTA) Database

<http://www.tradestatistics.com/gta/usda/>

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