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# Costa Rica

# Food Processing Ingredients

# Food Processing Sector Report

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**Report Highlights:**
Costa Rica is one of the major importers of raw materials and ingredients for the food processing industry in Central America. The United States continues to be the largest trading partner to Costa Rica. Costa Rica ran an $858 million agricultural, fish and forestry (AFF) trade surplus with the United States in CY 2011. That same year, U.S. AFF exports to Costa Rica totaled a record of $666 million, up 31 percent over 2010. Since the implementation of the United States-CAFTA-DR Free Trade Agreement, Costa Rica has found new opportunities to increase exports of processed food products not only to other Central American countries but also to the United States, Asia, and the Caribbean.

**Post:**
San Jose

**Executive Summary:**
**SECTION I - Market Summary**

The Costa Rican Chamber of the Food Industry (CACIA) reports that the domestic food industry is very developed and the estimated growth in 2012 is just 2%. Roughly one-half of the 80 sub-sectors CACIA analyzed suffered negative growth. This weakness is due to several factors: the economic downturn caused by the global economic crisis, resulting increased consumer caution, a strong increase in raw material costs, and strong price depressing policies in the sales channels.

This situation is holding back some of the predicted investments and leading to employment stagnation. For example, Café Montaña was expected to install new roaster equipment to increase its sales, but due to the uncertainty of the economy, the company stopped the project.

Exports were a bright spot, with estimated 2012 growth of approximately 8.5%. Even so, this is a modest figure compared to a few years ago when annual growth was between 18-20%.
Based on CACIA's associate data base, an estimate of the number of food processors in the country is around 632.

Costa Rica produces the following processed foods:
• Beverages: juice concentrates, powdered drinks, alcoholic and non-alcoholic beverages, drink bases and syrups, soy powder, fruit flavors, coffee.
• Preserved foods: canned vegetables, jams, jellies, etc.
• Confectionary: candies, chocolates
• Other processed foods: condiments, baked goods, sauces, dairy, cookies, crackers, snacks, cereals
• Deli meats: sausages, ham, MDM; boneless picnic; pork bellies, trimmings and offal; flours (fillers); animal fats
• Baking: pancake mixes, pre-mixes, bulk cake flours, vegetable whipped cream, cookie dough
• Snacks: soy flakes, nuts, fresh potatoes; fruit fillings; corn, rice, dry fruits,
• Oils and Dressings: palm oil, shortenings

There is wide variability in the kinds of ingredients of animal and vegetable origin used in food and beverage products in Costa Rica. The simplest ingredients used are egg albumin, cocoa, milk powder, natural sweeteners substituting sucrose (such as fructose), soy protein, corn, corn starches and corn flour, MDM's, whey protein, among others. Costa Rican consumption of herbs, herb extracts and fruit pulps has increased significantly as a result of expansion in the beverage and the confectionary industries in teas, jellies and juices. Spice use has grown following a gourmet trend in the preparation of home-made meals and desserts, as well as in restaurant menus and industry formulations. Local industry follows international trends in food and beverages, so it is constantly searching for new ingredients which provide additional benefits in health and nutrition, such as phytosterols, Omega-3 fatty acids, fibers, and antioxidant compounds.

U.S. products such as beef, pork, wheat, soybeans, and vegetables, as well as other food items, can easily be introduced to improve the quality of the goods being processed in Costa Rica. Some larger processors already import directly from the United States and many of the small processors still rely on local distributors to import their ingredients.

The largest volume of food ingredients of natural origin is used for the manufacture of confectionary and bakery products, sauces, dressings and condiments, sweet and salty premixes, dairy by-products, and beverages

The Center for Food Technology (CITA) of the University of Costa Rica is part of a cooperation agreement among the University of Costa Rica, the Ministry of Science and Technology and the Ministry of Agriculture. It was founded in 1974 as part of the University's program to work on food science and technology in direct collaboration with the government. CITA has licensed its technology to domestic processors, which will let the companies develop new products with CITA's scientific and technological support.

Some advantages and challenges that the food processing industry is facing in Costa Rica:

| **Advantages** | **Challenges** |
|---|---|
| Local processors are increasing their production capacity and food quality to export to the United States as a result of CAFTA-DR implementation. | Countries including Mexico, Argentina and Colombia can supply the local demand for ingredients and raw materials and compete with the U.S. |
| Costa Rica consumers are becoming more sophisticated in their food preferences. | Costa Rica is negotiating free trade agreements with the European Union and Colombia. |
| The United States is Costa Rica's main trading partner. U.S. food ingredients are well-known and considered of high quality. | New local food developments follow market trends (natural foods, juices, processed meats) |

| Costa Rica: Main Food Processing Export Products to the U.S.A. and the EU 2010-2011 | | | | |
|---|---|---|---|---|
| **Description** | **2010** | **%** | **2011** | **%** |
| Fruit Juices and Concentrates | 140.6 | 41.8 | 147.4 | 40.1 |
| Fruit pastes and purees | 45.7 | 13.6 | 43.0 | 11.7 |
| Sugar | 57.4 | 17.1 | 41.8 | 11.4 |
| Palm oil | 3.0 | 0.9 | 24.8 | 6.7 |
| Other preserved tropical fruit | 16.8 | 5.0 | 21.5 | 5.9 |
| Ethylic Alcohol | 13.4 | 4.0 | 11.3 | 4.7 |
| Heart of Palm (preserved) | 15.8 | 4.7 | 16.3 | 4.4 |
| Other food preparations | 7.6 | 2.3 | 12.4 | 3.4 |
| Fish preserves or canned | 3.9 | 1.2 | 5.4 | 1.5 |
| Sauces and preparations | 4.5 | 1.3 | 5.3 | 1.4 |
| Canned mixed fruit or natural | 3.1 | 0.9 | 3.8 | 1.0 |
| Plantain chips | 3.5 | 1.0 | 3.3 | 0.9 |
| Pasta (noodles, spaghetti, etc) | 3.5 | 1.0 | 3.0 | 0.8 |
| Herb extracts, tea concentrates | 0.0 | 0.0 | 2.7 | 0.7 |
| Premium bakery products | 2.7 | 0.8 | 2.7 | 0.7 |
| Others | 14.8 | 4.4 | 16.8 | 4.5 |
| | | | | |
| **TOTAL VALUE $** | **$336.3** | **$100.0** | **$367.5** | **$100.0** |

Ministry of Foreign Trade (COMEX)

| Main imported products from USA and the European Union 2011 | | |
|---|---|---|
| **Description** | **CIF** | **%** |
| Other food preparations | 32.8 | 14.0 |
| Worts, brewery and distillery industry waste | 24.7 | 10.5 |
| Animal feed | 19.7 | 8.4 |
| Patties & waste from soy oil extraction | 17.0 | 7.3 |
| Chocolate and all other food preparations containing cacao | 14.1 | 6.0 |
| Other | 180.4 | 77.0 |
| **TOTAL** | **234.3** | **100.0** |

**Ministry of Foreign Trade (COMEX)**

## SECTION II – ROAD MAP FOR MARKET ENTRY

### A. Entry Strategy

There are various ways to introduce food ingredients into the local market depending on the profile of the company and the food ingredient involved. The following are a few recommendations to consider:

• The presentation of the product to the food processing company may be done directly or through a distributor and/or representative. There are a few local and/or regional distributors who are very well-known in the F&B industry. Another option is through a joint-venture.

• It is necessary to identify the sector of the company where it is more convenient to present the food ingredient offered. This is extremely important for the product to be evaluated by the appropriate professionals. Larger companies usually have a R&D Division which interacts actively with the Marketing Division, especially if the ingredient is a novelty product. Other smaller companies receive proposals of new ingredients through their Purchasing Division.

• Besides presenting the product to the industry, it can be simultaneously promoted in specialized magazines (focused on food, nutrition and health), at technical events (seminars, conferences, etc), and/or trade shows. Professionals with a high technical expertise usually attend these events.

• The advantage that processors find in buying their raw materials from local suppliers or distributors is that more technical assistance is provided and also more options for financing are available to them. Local distributors/importers are willing to establish long-lasting business relationships with U.S. suppliers that can offer good credit terms, customer service and marketing support.

• The exporter may wish to hire a local representative who can provide customer service and technical support.

• U.S. suppliers interested in the Costa Rican market must comply with local regulations for imported products to avoid delays. For further information on these regulations, please refer to Costa Rica FAIRS Report 2012.

• With a high-degree of trade, especially with the United States, Costa Rican importers are accustomed to international business dealings. Many business people in Costa Rica are bilingual and have some level of English, thus facilitating business negotiations. However, the 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 prepared for this possible difference. U.S. exporters should also be prepared to be patient with export procedures and processes; Costa Rica has many levels of bureaucracy that can at times slow the importation of food products.

### B. Market Structure

Most of the food processors in Costa Rica import all of their ingredients directly; a few, however, rely on importers and distributors. They also have their own distribution channels to wholesalers, distributors and retailers, as well as to hotel, restaurant and institutional industries nationwide.

Distribution channels can be different between local and imported products and are constantly changing. The purchase of raw materials for food processing represents a significant portion of the cost of the final price of products.

In Costa Rica, there are many small companies with low sales volume and if they try to import directly would face high costs as the conditions and procedures for importing can be difficult. Therefore, it is better for them to use a local wholesaler who can take care of necessary import procedures. For large food processing companies, they usually have their own distribution chain.

For information on products registration requirements refer to the Food and Agricultural Import Regulations and Standards (FAIRS) Country Gain Report for Costa Rica.

**C. Company Profiles**

Thirty nine years ago, the Costa Rican Chamber for Food Industry (CACIA) was founded by Costa Rican food processors with domestic manufacturing operations. Its objective is to be the leading institution in promoting national and sector competitiveness, and defending the interests of the Costa Rican food industry. CACIA also works to boosting the domestic and international competitiveness of member businesses. CACIA's website is www.cacia.org

The following are some of the main food and beverage companies in Costa Rica:

| Company | Sales US$ | End-Use Channels | Processing Plant Location | Procurement Channels |
|---|---|---|---|---|
| ***Red meats and poultry meat (MDM; boneless picnic; pork bellies, trimmings and offals; flours (fillers); animal fats)*** | | | | |
| Cinta Azul (Cargill) | N/A | Retail & HRI | Alajuela | Direct importers |
| Corp. Pipasa (Cargill) | N/A | Retail & HRI | Heredia | Direct Importers |
| Don Fernando | N/A | Retail & HRI/own deli shop | San José | Direct & Local importers |
| Dist. Carnes Zamora | N/A | Retail & HRI | Heredia | Direct importers |
| Ind. Cárnicas Integ. | N/A | Retail | Alajuela | Direct importers |
| Sigma Alimentos | N/A | Retail & HRI | Alajuela | Direct importers |
| CIISA | N/A | Retail & HRI | Alajuela | Direct importers |
| ***Dairy Products (whey powder, protein concentrates)*** | | | | |
| Cooperativa de Productores de Leche Dos Pinos | N/A | Retail & HRI | Alajuela | Direct importers |
| Asoc.Prod. Láctea Apilac, S.A. | N/A | Retail | Pérez Zeledón | Local importers |
| Productores Monteverde | N/A | Retail & HRI | Puntarenas | Local importers |
| American Ice Cream Co. (POPS) | N/A | Retail | San José | Direct & Local |
| CoopeCoronado | N/A | Retail & HRI | San José | Direct & Local |

| | | | | |
|---|---|---|---|---|
| Coopeleche (Florida Bebidas) | N/A | Retail & HRI | San José | Direct & Local |
| Indulac (Sigma) | N/A | Retail & HRI | Cartago | Direct & Local |
| Universidad Earth | N/A | Retail | Limón | Local |
| Nutrilac, S.A. | N/A | Retail | San José | Direct & Local |
| ***Prepared fruits and vegetables (sauces, pastas, concentrates, and preserved)*** | | | | |
| Algo del Tejar | N/A | Retail & HRI | Alajuela | Local importer |
| Productos Gerber (Nestlé) | N/A | Retail | Cartago | Direct/Local |
| Dequealva, S.A. | N/A | Retail | San José | Local |
| Fideos Precocidos de CR | N/A | Retail & HRI | Heredia | Direct & Local |
| Industrias Irazú | N/A | Retail | San José | Local |
| Jaleas Ujarrás | N/A | Retail & HRI | Cartago | Local |
| Productos del Trópico | N/A | Retail & HRI | Heredia | Direct & Local |
| Roma Prince | N/A | Retail & HRI | Alajuela | Direct & Local |
| Grupo Del Oro, S.A. | N/A | Retail & HRI | Guanacaste | Local |
| Girocurz, S.A. | N/A | Retail | San José | Local |
| Pasta y Basta | N/A | Retail & HRI | San José | Local |
| Productos El Angel | N/A | Retail & HRI | Alajuela | Direct & Local |
| Alimentos Heinz de C.R. | N/A | Retail & HRI | San José | Direct & Local |
| Alimer, S.A. | N/A | Retail & HRI | San José | Direct & Local |
| Productos Lizano (Unilever) | N/A | Retail & HRI | Heredia | Direct & Local |
| Alimentos Kamuk | N/A | Retail & HRI | San José | Local |
| Grupo Profruta S.A. | N/A | Retail & HRI | San José | Local |
| ***Confectionary products (hard candies, chewing gum, chocolates, traditional candies)*** | | | | |
| Industrias Alim. Irazú | N/A | Retail | San José | Local |
| El Gallito Industrial | N/A | Retail | Heredia | Direct & Local |
| Cía Nacional de Chocolates | N/A | Retail | Heredia | Direct & Local |
| Cajetas Doña Chavela | N/A | Retail | Heredia | Local |
| Comercializadora Berlau | N/A | Retail & HRI | San José | Local |
| Delicias Leche y Miel | N/A | Retail | Costa Rica | Local |
| COPOZ – Cía. Pozuelo | N/A | Retail | Heredia | Direct & Local |
| Turrones de C.R. | N/A | Retail | Heredia | Local |
| Chiclera Costarricense | N/A | Retail | San José | Local |
| ***Snack Foods (dehydrated potato flakes and powder; soy flakes; nuts; fresh potatoes; corn; rice)*** | | | | |
| Alimentos Jack's | N/A | Retail & HRI | San José | Direct & Local |
| Grupo Gruma | N/A | Retail & HRI | San José | Direct Importers |
| Bio-Land | N/A | Retail | San José | Direct & Local |
| Grupo Pozuelo PRO | N/A | Retail & HRI | Heredia | Direct & Local |
| Pituca Snacks | N/A | Retail | San José | Local |
| Nueces Industriales | N/A | Retail & HRI | San José | Direct/Local |
| ***Baked goods (cookies; pancake mixes; pre-mixes, bulk cake flours; toppings)*** | | | | |
| Morrjons, S.A. | N/A | Retail & HRI | San José | Direct & Local |
| Musmanni | N/A | Retail & HRI | San José | Direct & Local |

| | | | | |
|---|---|---|---|---|
| Panaderías Merayo | N/A | Retail & HRI | San José | Local |
| Soluciones Bake and Cook | N/A | Retail & HRI | San José | Direct Importers |
| Alimentos Jack's de C.A. | N/A | Retail & HRI | San José | Direct Importers |
| Alimentos Ligeros | N/A | Retail & HRI | Heredia | Direct Importers |
| Cía de Galletas Pozuelo | N/A | Retail & HRI | San José | Direct/Local |
| Industrias Mafan, S.A. | N/A | Retail & HRI | San José | Direct/Local |
| Grupo Pozuelo Pro | N/A | Retail & HRI | Heredia | Direct/Local |
| Konig Sabroso | N/A | Retail & HRI | Heredia | Local |
| ***Beverages (alcoholic and non-alcoholic)*** | | | | |
| Florida Ice & Farm Co. | N/A | Retail & HRI | Heredia | Direct importer |
| Fábrica Nacional de Licores | N/A | Retail & HRI | Alajuela | Direct & Local |
| Licores y Cremas Lizano | N/A | Retail & HRI | Alajuela | Direct & Local |
| Coca Cola Femsa | N/A | Retail & HRI | San José | Direct importer |
| Fábrica de Refrescos La Flor | N/A | Retail & HRI | San José | Local |
| Vinos Saprissa | N/A | Retail | San José | Local |
| ***Animal Feed and Pet Foods (bulk grains and feed ingredients)*** | | | | |
| Corp. Pipasa SRL (Cargill) | N/A | Retail | Heredia | Direct Importer |
| Drs. Echandi | N/A | Retail | San José | Local |
| Dos Pinos Cooperativa de Leche RL | N/A | Retail | Alajuela | Direct Importer |
| Avícola Montserrat | N/A | Retail | Heredia | Direct Importer |

**D. SECTOR TRENDS**

• Costa Rican economy has rebounded, with GDP growing at a rate of 3.8 percent in 2011 and showing signs of continued growth in 2012

• With a high-degree of trade, especially with the United States, Costa Rican importers are accustomed to international business dealings. Many business people in Costa Rica are bilingual and have some level of English, thus facilitating business negotiations. However, the 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 prepared for this possible difference. U.S. exporters should also be prepared to be patient with export procedures and processes; Costa Rica has many levels of bureaucracy that can at times slow the importation of food products.

• Some major processors in the Costa Rica food industry are: Cargill, Del Monte, Bimbo, Nestlé, Demasa, Sigma Alimentos, Chiquita, Dole, Unilever, Riviana among others. The majority of the industry is composed of local companies that are growing larger as a result of the free trade agreements, which stimulates production for exports.

• At present, Costa Rica's population follows the trend towards more ready-to-eat foods, so demand for this type of product has increased domestically. The local processing industry is taking advantage of this niche market and products like refrigerated tacos, tortillas, instant soups and noodles, and desserts, among others, have a very good market in Costa Rica.

• Healthy, natural and organic foods also have a niche in the market.  There is a strong development of these products in Costa Rica since these imported products are too high priced for the lower economic sector.

• There is expanded demand for functional foods, such as milk containing Omega 3 and added calcium.

• The trend for artisanal beer is creating a greater demand for beer ingredients.

• Increased production of foods for export is increasing demand for inputs as oils, grains, and MDM.

• The local dairy industry is continuously launching novelty products, including cheeses, yogurts, and ice cream for the domestic and international markets.

• Bakery products, dry pasta and canned foods have expanded significantly and novelty products are being launched on a regular basis.

## III. COMPETITION

• Ingredients imported from the EU are less competitive due to the relatively high value of the Euro against the dollar.

• Large multinational food ingredient companies have representation in Mexico and also in other CAFTA-DR countries.

• Primary imported food ingredients are modified starches, thickeners, stabilizers, sweeteners, cocoa and fibers.

| Product Category | Major Supply Sources | Strengths of Key Supply Countries | Advantages and Disadvantages of Local Suppliers |
|---|---|---|---|
| **Beverages**<br><br>Net imports:<br>22,919 tons<br><br>US$19,449,148 million (CIF) | 1. El Salvador – 23%<br><br>2. USA – 19.5%<br><br>3. Nicaragua – 15% | Proximity | Local brands are well positioned in the market at competitive prices. |

| | | | |
|---|---|---|---|
| **Breakfast Cereals**<br><br>Net imports:<br>224,877 tons<br><br>US$89,661,765 million (CIF) | 1. USA – 75%<br><br>2. Canada – 20%<br><br>3. Mexico – 5% | Variety, marketing and high quality. | Less attractive presentation, but price competitive. Fewer "healthy" options. |
| **Dairy**<br><br>Net imports:<br>11,759 tons<br><br>US$28,407,138 million (CIF) | 1. Panama – 30%<br><br>2. Chile – 26%<br><br>3. USA – 26% | Panama is price competitive, geographically close and has developed a long-standing reputation in the market.<br><br>Chile is strong in branded processed cheese and cottage cheese.<br><br>USA is strong in milk and cream, cheese and cottage cheese, buttermilk, butter and other fats derived from milk, dairy spreads and yogurt. | Local companies are strong in liquid milk, ice cream, yogurt, cultured milk drinks and sweetened condensed milk. They are all very strong companies although affected by rising production costs. |
| **Eggs & products**<br><br>Net imports:<br>907 tons<br><br>US$2,397,968 million (CIF) | 1. USA – 52%<br><br>2. Panama – 37%<br><br>3. Mexico – 7% | Variety, marketing and high quality. | All of local production is consumed. |
| **Nursery products**<br><br>Net imports:<br>665 tons<br><br>US$4,130,798 million (CIF) | 1. Israel – 30%<br><br>2. Netherland – 12%<br><br>3. USA – 9% | Variety | Local products are strong. |
| **Nuts**<br><br>Net imports:<br>1,828 tons | 1. USA – 43%<br><br>2. Guatemala – 20%<br><br>3. Vietnam – 8.3% | Variety, marketing and high quality. | All of local production is consumed. |

| | | | |
|---|---|---|---|
| US$7,582,558 million (CIF) | | | |
| **Pet Foods**<br><br>Net imports:<br>30,195 tons<br><br>US$41,575,999 million (CIF) | 1. USA – 40%<br><br>2. Mexico – 25%<br><br>3. Brasil – 9.2% | Variety, marketing and high quality. | Local brands are well positioned in the market at competitive prices. |
| **Processed Fruits & Vegetables**<br><br>Net imports:<br>61,212 tons<br><br>US$80,577,086 million (CIF) | 1. USA – 48%<br><br>2. Canada – 15%<br><br>3. Guatemala – 9.7% | USA dominates the market with its products, mainly to the food service market. | Local processors are major exporters, but their local supply is limited. |
| **Red Meats**<br><br>Net imports:<br>11,042 tons<br><br>US$38,847,576 million (CIF) | 1. USA – 46%<br><br>2. Nicaragua – 27%<br><br>3. Canada – 8.2% | Variety, marketing and high quality | Local brands are well positioned in the market at competitive prices. |
| **Snack Foods**<br><br>Net imports:<br>51,034 tons<br><br>US$127,514,591 million (CIF) | 1. USA - 24%<br><br>2. Mexico – 20%<br><br>3. Guatemala - 18 % | Variety, marketing and high quality | Local producers are major food processors. They import food ingredients for snacks and snacks in bulk. |

## SECTION IV. BEST PRODUCT PROSPECTS

The best opportunities for suppliers of food ingredients are among those F&B manufacturing companies that offer high-value and new products to the consumer. The industry sub-sectors with a higher demand for these types of products are as follows:

Top U.S. Export Product Prospects:

| Product | 2010 Imports (Thousands USD) | 2011 Imports (Thousands USD) | % Change 2010 in comparison to 2011 |
|---|---|---|---|
| Vegetable oils (exc. soybean) | 1,446 | 4,586 | 217.22 |
| Breakfast Cereals | 3,400 | 5,858 | 72.29 |

| | | | |
|---|---|---|---|
| Red meat FR/CH/FR | 8,085 | 8,457 | 4.60 |
| Red Meats, Prep/Pres | 980 | 1,766 | 80.28 |
| Poultry | 6,991 | 7,830 | 12.10 |
| Dairy products | 6,789 | 10,449 | 53.92 |
| Fresh fruits | 17,343 | 19,880 | 14.63 |
| Tree Nuts | 3,152 | 6,273 | 99.00 |
| Processed fruit & Veg. | 24,204 | 30,203 | 24.79 |
| Snack foods | 17.445 | 23,311 | 33.63 |
| Fish and seafood | 508,298 | 665,757 | 30.98 |
| Wine and Beer | 1,462 | 2,058 | 40.71 |

**SECTION V. POST CONTACT AND FURTHER INFORMATION**

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

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Cámara de Industriales de Alimentos Balanceados www.ciabcr.com
Cámara de Porcicultores www.capor.com
Cámara de Fomento Agropecuario (CORFOGA) www.corfoga.org
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