

Staple Foods in Costa Rica

November 2023

Table of Contents

Staple Foods in Costa Rica

EXECUTIVE SUMMARY

Staple foods in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for staple foods?

MARKET DATA

- Table 1 Sales of Staple Foods by Category: Volume 2018-2023
- Table 2 Sales of Staple Foods by Category: Value 2018-2023
- Table 3 Sales of Staple Foods by Category: % Volume Growth 2018-2023
- Table 4 Sales of Staple Foods by Category: % Value Growth 2018-2023
- Table 5 NBO Company Shares of Staple Foods: % Value 2019-2023
- Table 6 LBN Brand Shares of Staple Foods: % Value 2020-2023
- Table 7 Penetration of Private Label by Category: % Value 2019-2023
- Table 8 Distribution of Staple Foods by Format: % Value 2018-2023
- Table 9 Forecast Sales of Staple Foods by Category: Volume 2023-2028
- Table 10 Forecast Sales of Staple Foods by Category: Value 2023-2028
- Table 11 Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028
- Table 12 Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Costa Rica

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers respond positively as bread prices start to fall

Consumers return to old habits with focus on convenience

Private label emerges in frozen baked goods

PROSPECTS AND OPPORTUNITIES

Private label bread to gain ground as more economical option

Baked goods to offer healthier options to meet growing consumer demands

Frozen baked goods will continue growing due to convenience

CATEGORY DATA

- Table 13 Sales of Baked Goods by Category: Volume 2018-2023
- Table 14 Sales of Baked Goods by Category: Value 2018-2023
- Table 15 Sales of Baked Goods by Category: % Volume Growth 2018-2023
- Table 16 Sales of Baked Goods by Category: % Value Growth 2018-2023
- Table 17 NBO Company Shares of Baked Goods: % Value 2019-2023
- Table 18 LBN Brand Shares of Baked Goods: % Value 2020-2023
- Table 19 Distribution of Baked Goods by Format: % Value 2018-2023
- Table 20 Forecast Sales of Baked Goods by Category: Volume 2023-2028
- Table 21 Forecast Sales of Baked Goods by Category: Value 2023-2028
- Table 22 Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028
- Table 23 Forecast Sales of Baked Goods by Category: % Value Growth 2023-2028

Breakfast Cereals in Costa Rica

KEY DATA FINDINGS

2023 DEVELOPMENTS

Innovation in children's breakfast cereals focuses on fun food and colourful designs

New competitors are emerging in breakfast cereals

Granola is growing in popularity and availability

PROSPECTS AND OPPORTUNITIES

Greater emphasis on packaging innovation to deliver convenience

Brands to shift towards cleaner and more natural ingredients

Private label expected to evolve in breakfast cereals

CATEGORY DATA

Table 24 - Sales of Breakfast Cereals by Category: Volume 2018-2023

Table 25 - Sales of Breakfast Cereals by Category: Value 2018-2023

Table 26 - Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023

Table 27 - Sales of Breakfast Cereals by Category: % Value Growth 2018-2023

Table 28 - NBO Company Shares of Breakfast Cereals: % Value 2019-2023

Table 29 - LBN Brand Shares of Breakfast Cereals: % Value 2020-2023

Table 30 - Distribution of Breakfast Cereals by Format: % Value 2018-2023

Table 31 - Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028

Table 32 - Forecast Sales of Breakfast Cereals by Category: Value 2023-2028

Table 33 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028

Table 34 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

Processed Fruit and Vegetables in Costa Rica

KEY DATA FINDINGS

2023 DEVELOPMENTS

Frozen fruits and vegetables growing due to convenience trends

Pequeño Mundo retailer expands access to low-cost processed fruit and vegetables

Private label expand lines of canned vegetables

PROSPECTS AND OPPORTUNITIES

Convenience factor will drive appeal supporting steady volume growth

Frozen fruits and vegetables expected to continue growing in availability and variety

Accessibility of fresh seasonal fruits and vegetables will continue to limit growth

CATEGORY DATA

Table 35 - Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023

Table 36 - Sales of Processed Fruit and Vegetables by Category: Value 2018-2023

Table 37 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023

 $\textbf{Table 38 - Sales of Processed Fruit and Vegetables by Category: } \\ \text{Value Growth 2018-2023}$

Table 39 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023

Table 40 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023

Table 41 - Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023

Table 42 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028

Table 43 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028

Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028

Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

Processed Meat, Seafood and Alternatives To Meat in Costa Rica

KEY DATA FINDINGS

2023 DEVELOPMENTS

Local and imported products expand in convenience stores

Processed seafood comes in multiple sizes to offer consumers cost savings

Taste tests offered at modern retailers to encourage trial

PROSPECTS AND OPPORTUNITIES

Health concerns will continue to hamper growth

Shelf stable meat to show slight grow among more affluent consumer groups

Vegetarian options expected to expand in the forecast period

CATEGORY DATA

Table 46 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023

Table 47 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023

Table 50 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023

Table 51 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023

Table 52 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023

Table 53 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028

Table 54 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

Rice, Pasta and Noodles in Costa Rica

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lower tariffs on imported rice have little impact on price

Imported varieties of pasta grow in popularity

Noodles gain appeal as consumers switch to more affordable staple foods

PROSPECTS AND OPPORTUNITIES

Growth of imported flavours in modern retailers

Tradition of rice consumption will support growth

Noodles with health claims expected to expand on retail shelves

CATEGORY DATA

Table 55 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023

Table 56 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023

Table 57 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023

Table 58 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023

Table 59 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

Table 60 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023

Table 61 - NBO Company Shares of Rice: % Value 2019-2023

Table 62 - LBN Brand Shares of Rice: % Value 2020-2023

Table 63 - NBO Company Shares of Pasta: % Value 2019-2023

Table 64 - LBN Brand Shares of Pasta: % Value 2020-2023

Table 65 - NBO Company Shares of Noodles: % Value 2019-2023

Table 66 - LBN Brand Shares of Noodles: % Value 2020-2023

Table 67 - Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023

Table 68 - Distribution of Rice by Format: % Value 2018-2023

Table 69 - Distribution of Pasta by Format: % Value 2018-2023

Table 70 - Distribution of Noodles by Format: % Value 2018-2023

Table 71 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028

Table 72 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2023-2028

Table 73 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028

Table 74 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2023-2028

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.