



Coffee in Costa Rica

December 2025

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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

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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

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