



Euromonitor  
International

# Bottled Water in Costa Rica

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## Bottled Water in Costa Rica - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Bottled water returns to normal trading conditions

#### INDUSTRY PERFORMANCE

Fall in retail volume sales, as tap water supply stabilises

Flavoured bottled water registers highest volume growth

#### WHAT'S NEXT?

Positive volume growth over forecast period

Limited innovation, though flavoured sparkling water offers opportunities

Health and wellness and sustainability key drivers of growth

#### COMPETITIVE LANDSCAPE

Coca-Cola FEMSA leads a highly fragmented landscape

Private label makes gains

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Supermarkets lead, while warehouse clubs gain most volume share

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Lower tourist numbers dampen volume sales

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Zero volume growth in 2025

Health and wellness claims enter the mainstream

Marketing strategies continue to evolve

#### WHAT'S NEXT?

Steady volume growth over forecast period

Two US companies continue to lead

Potential headwinds a concern

## COMPETITIVE LANDSCAPE

Florida Bebidas holds on to tight lead

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## SOURCES

Summary 1 - Research Sources

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