



Processed Meat, Seafood and Alternatives To Meat in Costa Rica

November 2025

KEY DATA FINDINGS

2025 DEVELOPMENTS

Ongoing popularity of chilled processed red meat

INDUSTRY PERFORMANCE

Processed meat, seafood and alternatives continue to grow as consumers search for protein

Health and wellness trend encourages higher-income consumers to eat more fish

WHAT'S NEXT?

Private label expansion

Simpler ingredients lists are sought after for plant-based alternatives

Growth of international products

COMPETITIVE LANDSCAPE

Cargill's broad portfolio and well-known brands support its lead in 2025

Dynamic Centro Internacional de Inversiones

CHANNELS

Supermarkets have a wider selection of brands and presentations

Consumers value the convenience of e-commerce

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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Staple Foods in Costa Rica - Industry Overview

EXECUTIVE SUMMARY

With budgets stretched, consumers remain highly price conscious

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Consumer Price Index (IPC) shows a decline in prices for several categories

Impact of declining tourism and contraband

Health and wellness driving demand for better-for-you products

Influence of social media and convenience

WHAT'S NEXT?

Increased interest in healthy and functional foods

Global flavours to gain traction

Rising influence of social media

COMPETITIVE LANDSCAPE

Consumers appreciate the freshness of artisanal products

Cía Numar SA benefits from its widely recognised and trusted brands

CHANNELS

Supermarkets lead, offering a wide product range, lower prices and convenience

Convenient e-commerce's penetration continues to grow

Low prices attract

MARKET DATA

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