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Costa Rica

Wine

Report

2004

Approved by:

Alan D. Hrapsky, Ag. Agricultural Counselor
FAS San Jose

Prepared by:

BAC Consultants & Associates

Report Highlights:

Costa Rica's wine market is growing rapidly, with imports in the 14% level.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
San Jose [CS1]
[CS]

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SECTION I. EXECUTIVE SUMMARY

Over the last few years Costa Rica (with nearly 4 million inhabitants) has experienced virtual economic stagnation, as can be seen from the analysis of the country's key economic indicators. These indicators, however, also suggest that the Costa Rican economy has begun a significant recovery from 2002 on, with more attractive prospects for wine imports, which are expanding in and of themselves.

While 96% of the wine consumed in Costa Rica is the result of imports, production is beginning to take place in the country and accounting for the remaining 4%. Wine marketing is chiefly aimed at the middle class of Costa Rican society.

Since the 70s Chile has been the key supplier of wine to the Costa Rican market. In 2003, wine imports from Chile accounted for 38% of all wine imports. As supplier, Chile is followed by Italy (24%), and Spain (15%), while Germany, France, the United States and a number of other countries account for 5%-7% of domestic imports each. Wine imports in Costa Rica have grown at an average rate of 14% for the last 3 years, reaching over 26,400 hectoliters and US\$7.2 million in 2003.

Eighty per cent of wine is marketed by retailers in Costa Rica (supermarkets, liquor stores, and specialized wine distributors and co distributors.) Retailers are supplied by wholesalers who import the wine. Wholesalers market 20% of wine directly to hotels, restaurants, and bars. Retail prices for best selling wines range between US\$ 3.5 and US\$ 4.5 in the case of those manufactured in Costa Rica and US\$ 4—US\$ 12 for imported wine.

Per capita wine consumption in Costa Rica has experienced a significant increase in the last few years. Currently it is estimated between 0.75 and 1.17 liters in 2003 (based on total population and that over 18, respectively.) Wine has undergone significant progress among favorite alcoholic beverages. It has a large consumption potential, chiefly when we consider that per capita consumption in other Latin American countries, such as Argentina and Uruguay, is 30 and 40 liters, respectively. Red wine is the type consumers drink the most (60%.)

Better knowledge of this product combined with varying consumer tastes and preferences is resulting in a significant increase in wine consumption in the country. Add to this the growing influx of executives and tourists into the country (1.1 million in 2003), who influence the domestic demand for wine, plus the growing trend for wine imports (14% on average for the last 3 years.)

Chile, Italy, and Spain, that together have captured 75% of Costa Rican wine market, are the strongest competitors of American wine manufacturers in Costa Rica. However, France, Germany, and the U.S.A. also compete (with each holding nearly 6% of the market.) Trends also indicate that Argentina will soon be competing for a share of the market with the latter 3 countries. Italy competes on price and quality, while Argentina is a strong competitor on price and product variety. Chile also competes on price and quality, taking advantage of its free-trade agreement with Costa Rica. France competes on product quality, while Germany does so on the basis of quality and price.

The best market perspectives for American wines are those resulting from wines aimed at Costa Rica's large middle class, whose purchase decisions are chiefly based on price and then on quality, in that order. While current consumption focuses on red wines, there is also a significant demand for white and sparkling wines. Quality wines aimed at Costa Rica's upper middle class also make for a good business opportunity, fueled by organic wines and special wines intended for particular communities (e.g., the Jewish community.)

SECTION II. ECONOMIC SITUATION

Costa Rica's Gross National Product (GNP) has grown steadily over the last few years, with over 1% growth in 2001 in relation to 2000. Also, in 2002 Costa Rica's GNP grew nearly 3% in relation to the previous year, reaching US\$ 17,060 million.

GNP's growth has been more dynamic in the transportation, warehousing, communications, and manufacturing sectors. Growth has been steady in trade, hotels and restaurants, and it has been lower in other sectors of the economy.

The inflation rate for 2002 was 9.7%, below that for the preceding year and under the 11% goal established in the country's money plan. Costa Rica's money reserves in 2002 grew over 12% over those for 2001, from US\$ 1,330 to US\$ 1,495 million.

Costa Rica's total external public debt reached over US\$ 3,300 million in 2002, amounting to 9.8% of the country's GNP in that year, although it was lower than that for 2001. Sixty per cent of total public debt can be ascribed to the central government, 19% to Costa Rica's Central Bank and 21% to the remainder of the country's public sector.

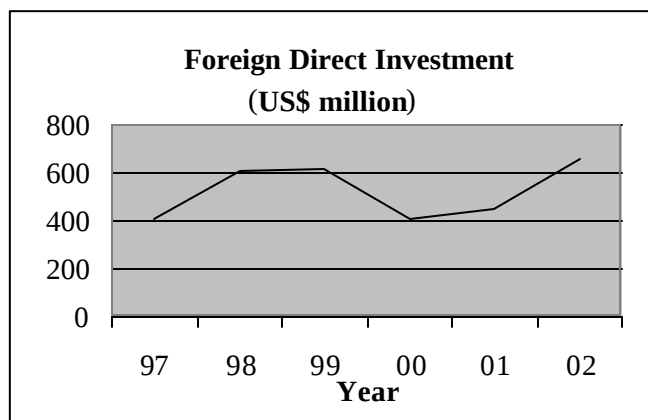
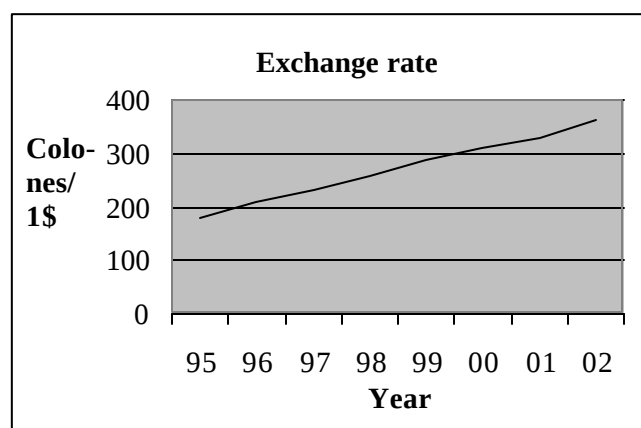
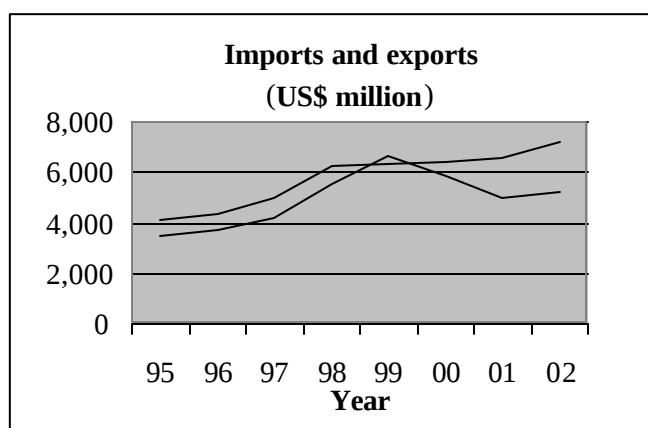
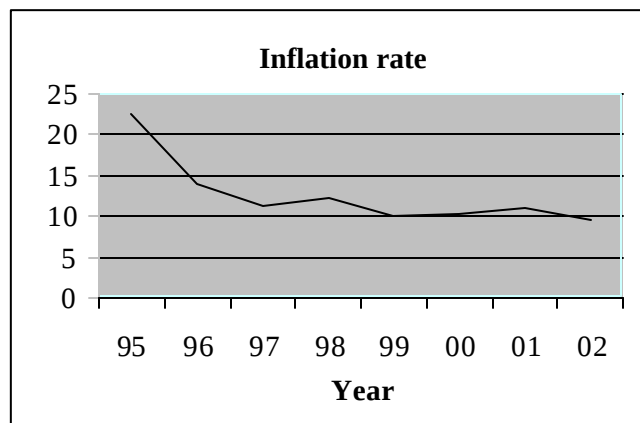
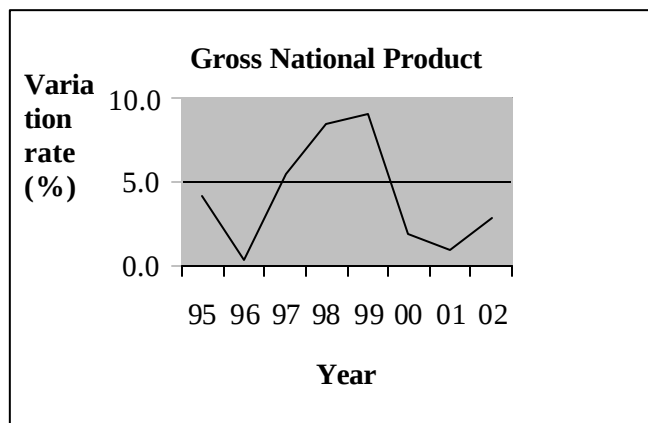
Employment levels improved 2% in 2002 in relation to 2001. Underemployment and unemployment rates, however, were 8% and 6%, respectively, by 2002.

The imports level over the last five years has exceeded US\$ 6,000 million per year, with over US\$ 7 million in 2002. Exports decreased 14% in 2001 against those for the previous year. However, exports grew at a 4.6% rate in 2002, reaching US\$ 5,252 million, with additional growth projected for 2003.

Home consumption expenditures increased 2.5% in 2002 against the previous year. This expenditure level in 2002 reveals a significant increase in the purchases of imported goods (approximately 45%, chiefly food items and cars.) On the other hand, domestic goods in home consumption in 2002 experienced a 2% decrease.

Foreign investment has grown steadily since 2000, reaching US\$ 642 million in 2002, the highest mark ever in Costa Rican history. The purchase of 25% of the stock of Florida Ice and Farm by Heineken International for US\$ 218 million accounts for this high level of foreign investment.

Generally speaking, all economic indicators analyzed suggest that Costa Rica has experienced relative economic stagnation over the last few years, with recovery starting as of 2002.

**Year 2002**

	US\$ M
GNP	17,060
Per capita GNP	4,160
Exports (FOB)	5,251
Imports (FOB)	6,798
	%
Inflation rate	9.7
Devaluation rate	11.0
Unemployment rate	6.4

Source: Banco Central de Costa Rica-BCCR-www.bccr.fi.cr

SECTION III. PRODUCTION

Costa Rica produces some grape wine, as well as wine from other fruit growing in the country including cashew and wax apple. However, grape wine is the most accepted and sold. Grape wine manufacturing in Costa Rica is only incipient, having started just five years ago upon the initiative of domestic firms. These market their product in line with what is considered to best fit the tastes of Costa Rica's middle class population, i.e., a rather sweet, soft, sparkling wine. Under this criterion, Costa Rican wine includes seven different types, including white, rosé, and red wine, as well as champagne. Dry, semidry, sweet dry, sparkling, and sweet varieties of these are manufactured.

Costa Rica manufactures young rather than old wines. Both domestic grapes (chiefly the Ruby, seedless variety) and must imported mainly from Mexico and the United States are used in the manufacturing process.

Due to the relatively incipient status of the wine industry in Costa Rica, no government programs encouraging viniculture nor official statistics on wine production exist at present. However, based on the information provided by the technical staff of domestic wine manufacturers, production is estimated to have increased over the last three years, from some 225 hectoliters in 2001 to over 1,130 hectoliters in 2003. Domestic wine production experienced a significant increase (340%) in 2001-2002, with plants operating at their highest capacity for the first time ever. Also, domestic wine production is estimated to have increased 14% in 2003 in relation to 2002 (see Table 1.) Costa Rica's wine production is entirely intended for domestic consumption.

Table 1
Grape wine production in Costa Rica

Year	2001	2002	2003
Hectoliters	225	990	1130
Variation (%)	-	340	14

Source: BAC, based on data provided by officers of Costa Rican grape wine manufacturers.

National grape wine production for 2003 is estimated to be worth some US\$ 527,000, on the basis of an average sales price of US\$ 3,5 at factory level.

SECTION IV. IMPORTS

Wine imports in Costa Rica between 2001 and 2002 were worth over US\$ 5 million and US\$ 6 million, respectively (see Table 2.) Estimations for grape wine imports in Costa Rica in 2003 (see Annex 1) indicate they will exceed 5,300 MT, with an estimated value of US\$ 7 million. These expectations are based on import variation rates in 2001-2002 (10%-18%, respectively.) Total grape wine imports expected for 2003 are over 650 MT above those in 2002, a 14% increase (see Table 2.)

Table 2
Grape wine import distribution, 2001-2003

Country of origin	Year				
	2001	%	2002	%	2003
Chile	1,364	34	1,801	38	2,182
Italy	923	23	1,104	24	1,117
Spain	625	16	692	15	763
Germany	260	7	286	6	315
France	260	7	215	5	298
United States	204	5	253	5	221
Others	330	8	338	7	448
Total MT	3,966	100	4,689	100	5,344
Percentage variation	10		18		14
Value, US\$M	5,3		6,1		7,2

Source: BAC, based on Costa Rica Central Bank statistics

Chile is the largest wine supplier to the Costa Rican market. Wine imports from Chile reached over 1,300-1,800 MT in 2001 and 2002, respectively. Grape wine imports from Chile are expected to be over 2,000 MT in 2003 (see Table 2.) In the same vein, Italy y Spain are second and third to Chile, respectively, with growing imports on the last two years and with figures between 700 MT and 1,100 MT expected for 2003. Germany, France, and the U.S.A. supply lower quantities of wine, although these are no less important, since over the last two years imports from those countries have exceeded 200 MT and they show a growing trend (particularly in the case of the two European countries.) (See Table 2)

Except for Argentina (which, in line with the trends noticed, will soon be among those countries exporting over 200 MT of wine per year to Costa Rica,) he other countries exporting wine to Costa Rica rarely exceed 10 MT per year each. Imports from this latter group of countries tend to grow and are expected to reach nearly 450 MT in 2003 (see Table 2.)

Generally speaking, on the basis of a per-country distribution of grape wine imports over the last three years, it can be said that Chile provides 37% of grape wine imports, followed by Italy and Spain with 23% and 15%, respectively (Figure 1.) Germany and France each account for 6% of grape wine imports, and the U.S.A. accounts for 5%. The remainder (nearly 8%) is provided by over 25 different countries (Figure 1.) (See Annex 2 for a list of the countries exporting wine to Costa Rica over the last three years.)

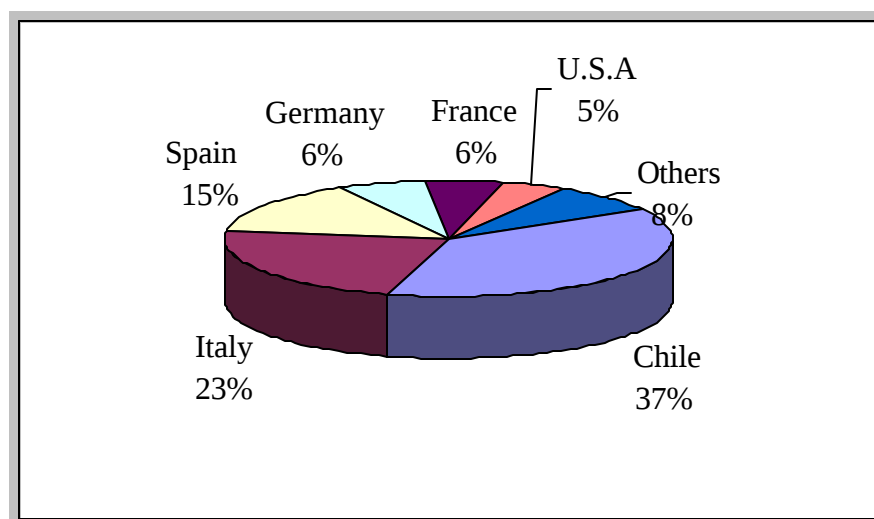


Figure 1. Per-country distribution of grape wine imports in Costa Rica

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SECTION V. DOMESTIC MARKET

A. Domestic supply

Wine supply in Costa Rica increased in the last two years, as a result of imports and domestic production. For 2003, wine supply is estimated to be 31,000 hectoliters (see Table 3.) Imported wines account for approximately 96% of wine supply in Costa Rica, while domestic production accounts for 4% (see Table 3.)

Table 3
Grape wine domestic supply

Item	2001	2002	2003
	Hectoliters		
Domestic production	225	990	1,130
Percentage	1	4	4
Imports	22,309 ^a	26,376	30,060
Percentage	99	96	96
Domestic supply	22,534	27,366	31,190

^a Kilogram conversion to hectoliters in the case of imports (see Table 2) was made considering that most wine is imported in Costa Rica in 16-kilogram cases, each containing twelve 0.75 liters.

Red, white, rosé, and sparkling wine are generally available in the country. Red wine, however, currently accounts for 60% of domestic market. (See Annex 3 for a list of wines commonly found in the Costa Rican market.) Over 90% of wines in the market are thought to be sold in glass bottles (0.75 liters,) although they are also sold in 1.5 liter bottles and in Tetra Pack containers (0.75 – 1.00 liters.)

Major importing and marketing firms sell nearly 80% of wine through retailers, including supermarkets, wine distributors (both liquor stores and specialized wine distributors) as well as co distributors (cooperatives, chains.) The remaining 20% is sold directly to hotels, bars, and restaurants. (See Annex 4 for a list of major wine importers and distributors.)

Costa Rican consumers have become more wine-savvy over the last few years. Price, however, and then quality are still the major factors in purchase decisions. Prices ranging between US\$ 2.9 and US\$ 40 are found in the main retail stores, namely, supermarkets and liquor stores. Retail prices for the wines most consumed in 2003 ranged between US\$ 3.5 and US\$ 12 (see Table 4.)

Table 4
Retail price bands for wines in Costa Rica, 2003

Wines	Container	Volume	Price bands US\$ *
Domestic wines	Bottle	0.75	3.5 – 4.5
Imported wines	Tetra Pack	0.75 – 1	4 – 5
Imported wines	Bottle	0.75	6 – 8
Fine imported wines	Bottle	0.75	> 12

* US\$ 1 = ₡412

It must be highlighted that, generally speaking, supermarket chains in the country (with nearly 150 stores) as well as liquor stores (with over 100 advertising in the metropolitan area) are not direct importers of wine. All of these are supplied by the same wholesalers, leading them to compete chiefly on price, but selling the same products.

In comparison with other alcoholic beverages consumed in the country, with a 35% plus alcohol content, wines in Costa Rica are seen as having a moderate alcohol content (with 9%-13%.)

B. Consumption

From 2001 on, Costa Rica's population exceeded 4 million (see Table 5.) Liquors can be legally consumed in Costa Rica by all those 18 and above. This means that, in 2003, the potential market for wine in the country was within a population comprising over 2,600,000 individuals (over 60% of the country's total population.) (See Table 5.)

Table 5
Costa Rica, Population

Population	Year		
	2001	2002	2003
Total population	4,008,265	4,089,609	4,169,730
Percentage	2.11	2.01	2.00
Population over 18	2,511,298	2,588,827	2,671,392
Percentage	63	63	64

Source: BAC, based on data from INEC, 2002

Taking into account that Costa Rica does not export wine, we can estimate per capita consumption on the basis of domestic supply (see Table 6.) Per capita wine consumption has increased over the last two years, from 0.56 liters per individual to an estimate 0.75 per individual in 2003. This trend is even stronger if we take people over 18 as the basis. In this case, per capita consumption increased from 0.9 liters in 2001 to an estimate 1.7 liters per individual in 2003 (see Table 6.)

Table 6
Per capita grape wine consumption

Consumption	2001	2002	2003
	Liters		
Per capita consumption	0.56	0.67	0.75
Per capita consumption (population over 18)	0.90	1.06	1.17

May, July, and November are the months when wine consumption reaches a peak in Costa Rica, as they come just ahead of significant occasions such as Father's Day, Mother's Day, and Christmas.

C. Competing products

The results of a national survey on alcoholic beverages taken every five years in Costa Rica indicate that beer remains favorite high above guaro (the typical alcoholic beverage manufactured from sugar cane), rum, wine and other spirits with lower consumption levels in the country (see Annex 5.) Consumption patterns, however, show a decline in this preference.

On the other hand, preference for wine has increased significantly over the last few years (see Annex 5). This suggests a development of favorable conditions for a larger share for wine in Costa Rica's beverage market. This becomes even more significant if we take into account that other beverages with higher degrees of consumption in Costa Rica (e.g., rum and guaro) have not experienced a significant increase in consumer preferences for the last five years (see Annex 5.)

SECTION VI. MARKET TRENDS

Costa Rica shows a rapid increase in wine consumption. This is corroborated by growing import and per-capita consumption trends, as well as by the fact that, over the last 10 years, the preference for wine has increased in the country, offering a significant potential for this beverage. Here we must observe that, currently, per-capita consumption of wine in Costa Rica is scarcely above 1 liter (even though it is growing) while in other Latin American countries (e.g., Uruguay and Argentina) per-capita consumption exceeds 30-40 liters per individual, respectively.

Acceptance for the wine culture in Costa Rica began in the business environment and the high-income sector. However, a deeper knowledge of wine is leading to increased wine consumption in other population segments. Thus, for instance, representatives of the main wine distributing firms point at the segment with middle-high purchasing power as one tending to change its consumption habits and showing a marked preference for wine.

On the other hand, more stores specializing in wine are opening in Costa Rica. These carry out activities such as fraternities, conferences, and wine-tasting events. Also, they offer special prices and promote the development of new wine brands. As a result, in addition to consumption of Chilean wine, these practices are helping increase the consumption of Italian, Spanish, American (chiefly Californian), and Argentinean wine in Costa Rica.

Two more trade and economic factors strongly reinforce the expectations for increased consumption of wine in Costa Rica. One of these is the country's commercial opening through lower tariffs (as is the case with Chile) which makes wine accessible to larger numbers of the population. Likewise, and as a result of this, a larger number of brand names and countries of origin is expected in the market.

The second factor contributing to the consumption of wine in the country is a larger presence of executives from foreign companies, together with foreign tourists. Their demand for higher-quality wines promotes these among domestic consumers, leading to a change in local preferences and stimulating domestic demand. We must point out that over 1.1 million tourists visit Costa Rica each year, and this figure increases approximately 7% per year.

SECTION VII. COMPETITION

The strongest competitors for American wines in Costa Rica are the major suppliers to the country, namely, Chile, Spain, and Italy which, combined, account for 75% of Costa Rica's wine market (see Table 1.) However, American wines are currently competing also with French and German wines, that strive to retain nearly 6% of this market each. In every case, competition takes place against a large number of brand names from supplying countries.

Competition is particularly strong in the case of Chilean wines. Chile has retained a leadership position in the Costa Rican wine market since the 70s, when the first steps for relatively significant wine consumption were taken in Costa Rica. Costa Rican consumers have been highly influenced by Chilean wines from two specific vineyards, "Concha y Toro" and "Undurraga." Although today's Costa Rican market is generally more knowledgeable in terms of wine, its

historical relationship with Chile continues to be a factor sometimes preventing consumers from trying other wines from different vineyards and countries, such as the U.S.A.

Argentinean wines are currently very significant in terms of competition for different countries, including the U.S.A. Unlike the Chilean inroad in Costa Rica's wine market, Argentinean businesspeople have deeply tested this market with wines from a large number of Argentinean vineyards. This scenario is leading to strong acceptance of the Argentinean wine culture by Costa Rican consumers. Argentina, on the other hand, steadily improves the quality and price of its wines in the Costa Rican market, leading to increased wine imports from that country (at an average rate of 15% over the last 3 years.) Imports of Argentinean wine can be expected to exceed 200 MT in the short term and to put pressure on the position of American wines in the Costa Rican market. One more thing to be pointed out is the fact that Argentina is not the only country with low prices in this market. In addition to Chile, which does not pay the 14% tariff as a result of its free trade agreement with Costa Rica, Italian wines are also showing a low-price trend in the Costa Rican market.

Generally speaking, it can be concluded that Italy competes on price and quality, while Argentina strongly competes on price and product variety. Like Germany, Chile competes also on price and quality, chiefly taking advantage of its free-trade agreement with Costa Rica, and France competes on the basis of product quality.

SECTION VIII. BEST PROSPECTS FOR WINE

Red and white wines (Costa Rican tariff code 2204.21.00), as well as sparkling wines (Costa Rican tariff code 2204.10.00) are those with the highest potential in the Costa Rican market. Red wine is the best-accepted type, with an estimated 60% market share in 2001.

Taking into consideration that a large middle class exists in Costa Rica, whose wine purchase decisions are based first on price and then on quality, wines in the US\$ 6 – 8 per bottle price band have a large potential for sales. However, these same wines offered in Tetra Pack containers make for an interesting alternative to the middle-income population segment. Higher value/quality wines have higher sales potential in the middle- and upper-middle-income population segment, particularly if they are introduced in conjunction with wine-diffusion activities taking place in strategic locations, including corporate tasting events and provision of general information at the time of purchase. The introduction of higher quality/value wines has potential provided it is aimed at high-income population segments, as well as at the business and tourism sectors.

Experience with wine markets involving special communities in the U.S.A. can be useful to enter similar markets in Costa Rica. This is the case, for instance, with special wines aimed at the Jewish community and at population segments prizing healthy, harmless products such as organic wines. In relation to this, we must remember that a significant factor of the increase in the consumption of wine in Costa Rica has been the statement made by the representatives of the major wine distributing companies in the country about the beneficial cardiovascular effects of drinking a cup of red wine every day. All of these factors, together with the potential benefits from a U.S.A.-Costa Rica Free Trade Agreement, must be taken into account when considering introducing American wines in the Costa Rican market.

SECTION IX. MARKET ACCESS**Taxes**

Wine imports are not restricted by the Costa Rican government. Total import taxes are based on CIF value, and result from the addition of the following items:

- | | |
|--|---|
| - 14% ad-valorem tax | (levied against the CIF value known in Costa Rica as “D.A.I.”) |
| - 10% IFAM tax | (levied against CIF value.) |
| - 10% selective consumption tax | (levied against the total cumulative CIF value plus ad-valorem tax.) |
| - 1% economic stabilization tax (Act # 6946) | (levied against CIF value.) |
| - 13% sales tax | (levied against the cumulative amount of CIF value plus ad-valorem tax, consumption tax, and economic stabilization tax.) |

Sample customs tax calculation

Item: sparkling wine; Costa Rica tariff code 2204.10.00

PRODUCT CIF VALUE:	\$ 100.00	
Step 1: AD-VALOREM TAX		
14% of CIF value (0.14 X \$100) =	\$ 14.00	\$ 14.00

Total CIF value, plus ad-valorem tax:	\$ 114.00	
Step 2: IFAM TAX		
10% of CIF value (0.10 X \$100) =		\$ 10.00
Total CIF value, plus ad-valorem tax, plus IFAM tax:	\$ 124.00	
Step 3: CONSUMPTION TAX		
10% of above total (0.10 X \$124) =	\$ 12.40	\$ 12.40
Step 4: ACT 6946 TAX		
1% of CIF value (0.01 X \$100) =	\$ 1.00	\$ 1.00

Total CIF value, plus ad-valorem tax, plus IFAM tax, plus consumption tax, plus Act 6946 tax:	\$ 137.40	
Step 5: //SALES TAX		
13% of above total (0.13 X \$137.40) =	\$ 17.86	\$ 17.86
	-----	-----
TOTAL DUTY/TAXES:		\$ 55.26
		=====
TOTAL PRODUCT VALUE PLUS TAXES:	\$ 155.26	

Labeling

Labeling is mandatory. Generally (except when otherwise indicated based on a specific or individual standard) information such as product name; ingredients list; net content or weight (this can be stated in terms of multiples, e.g., 100 grams, 250grams.); manufacturer's name and address; bottler; distributor or importer; country of origin; lot ID; expiration date; directions for use, and space to indicate sanitary registry number. In the case of liquors, the alcohol percentage must be shown on the label. Also, the label must contain a warning indicating that alcohol consumption is damaging to health.

SECTION X. SUBSEQUENT CONTACT

For questions in relation to this report or assistance in exporting to Costa Rica, please contact the US Embassy in San José at the following address:

1. U.S. Embassy Commercial, Agricultural, and Trade-Related Contacts

U.S. Department of Commerce-U.S. Commercial Service Unit 2508

APO, AA 34020-9508

Phone: (506) 220-3939 extensions 2202, 2207, 2263/220-2454

Fax: (506) 231-4783

E-mail: san.josecr.officebox@mail.doc.gov

Website: www.USATRADE.gov/Costa Rica

Ms. Margaret Hanson-Muse, Commercial Attaché

Mr. Víctor Cambronero, Senior Commercial Specialist

Ms. Rodrigo Rojas, Commercial Specialist

Ms. Eugenia Solera, Commercial Assistant

U.S. Department of State-Economic Section-Unit 2501

APO AA 34020-9501

Phone (506) 220-3939 Fax (506) 220-2305

Website: www.usembassy.or.cr

Mr. Frederick Kaplan, Political Economic Counselor

Mr. Todd Chapman, Economic Officer

Mr. José María Quirós, Economist

U.S. Department of Agriculture

Foreign Agricultural Service (FAS)-Unit 2507

APO AA 34020

Phone (506) 519-2333 Fax (506) 519-2475

E-mail fassjo@racsa.co.cr

Website: www.fas.usda.gov

Mr. Alan C. Hrapsky, Agricultural Attaché

Mr. Víctor González, Agricultural Specialist

Ms. Ileana Ramírez, Agricultural Marketing Assistant

For further information:

2. AMCHAM (Local American Chamber of Commerce)

Cámara Costarricense-Norteamericana de Comercio—AMCHAM
(Costa Rican-American Chamber of Commerce –AMCHAM)

U.S. mailing address: 1576 P.O. Box 025216

Miami, FL 33102-5216

International mailing address:

Apdo. 4946-1000

San José, Costa Rica
Phone (506) 220-2200 Fax (506) 220-2300
E-mail: chamber@amcham.co.cr
Website: www.amcham.co.cr

3. Country Trade and Industry Associations in Key Sectors

Cámara de Comercio de Costa Rica
(Costa Rican Chamber of Commerce)
Apartado 1114-1000
San José, Costa Rica
Phone (506) 221-0005/221-0124 Fax (506) 233-7091
E-mail: camaraco@racsa.co.cr
Website: www.camara-comercio.com
Contacts: Emilio Bruce, President, or Coimbra Sáenz, General Manager

Cámara de Representantes de Casas Extranjeras (CRECEX)
(Chamber of Representatives of Foreign Firms)
Apartado 3738-1000
San José, Costa Rica
Phone (506) 253-0126 Fax (506) 234-2557
E-mail: crecex@racsa.co.cr
Website: www.infoweb.co.cr/crecex
Contact: Mr. Walter Marín, Executive Director

Cámara de Industrias de Costa Rica
(Costa Rican Chamber of Industries)
Apartado 1003-1000
San José, Costa Rica
Phone: (506) 281-0006/0004/0005 Fax: (506) 234-6163
E-mail: amind@racsa.co.cr
Contact: Mrs. Mayi Antillón, Executive Director

Cámara Nacional de Agricultura y Agroindustria
(National Chamber of Agriculture and Agribusiness)
Apartado 1671-1000
San José, Costa Rica
Phone: (506) 280-2173/225-8245/280-1569/280-0096(506) 280-0969
Fax: (506) 280-0969
E-mail: cnaacr@racsa.co.cr
Contact: Mr. José Madríz, President
Ms. Marisa Cordero, Executive Director

Coalición de Iniciativas de Desarrollo
(CINDE/Costa Rican Investment and Trade Development Board)
Apartado 7170-1000
San José, Costa Rica

Phone (506) 200-0036 or 299-2803 Fax (506) 299-2866 or 220-4750

E-mail: abonilla@cinde.or.cr

Contact: Ms. Anabelle González, Director

Ms. Aleida Bonilla, Coordinator, Special Projects

(CINDE/Costa Rican Investment and Trade Development Board)

E-mail: cindey@aol.com

Contact: Mr. Eduardo Hernández, Investment Officer

Ms. Pilar Madrigal, Assistant

Office in California

4516 Carlyle Court, Suite 1622

Santa Clara, California 95054

Phone: (408) 988-9001 or 988-8079 Fax (408) 988-8090

E-mail: jmorales@cinde.or.cr

Contact: Mr. Armando Morales, Investment Officer

COMPREHENSIVE ECONOMIC INFORMATION:

Central Bank of Costa Rica

www.bccr.fi.cr

Ministry of Foreign Trade

www.comex.go.cr

Costa Rican Foreign Trade Corporation

www.procomer.com

U.S. Bureau of Labor Statistics

<http://stats.bls.gov>

STATISTICS AND POPULATION:

National Institute of Statistics and Census-INEC

www.inec.go.cr

NEWSPAPERS:

La Nación

www.nacion.co.cr

El Financiero

www.financiero.co.cr

La República

www.larepublica.net

La Prensa Libre

www.prensalibre.co.cr

The Tico Times

www.ticotimes.net

ANNEX 1
Wine imports in Costa Rica, 2003

Country	Metric Tons (MT)			
	Imports January-October ^a	%	Estimated imports November-December	Total estimated imports
Chile	1,473	44	709 ^b	2,182
Italy	654	19	463	1,117
Spain	458	14	305	763
Germany	187	6	128	315
France	180	5	118	298
U.S.A.	123	4	98	221
Others	300	9	148	448
Total	3,375	100	1,969 ^c	5,344

^a Real imports

^b Per-country distribution for November-December estimated on the basis of average distributions for the last two years.

^c Estimation made on the basis of average variation rates (14%) for wine imports in Costa Rica for 2001-2002.

Source: BAC, based on Costa Rica Central Bank statistics.

ANNEX 2
Countries exporting wine to Costa Rica, 2001 - 2002

Country	Year			Country	Year		
	01	02	03 *		01	02	03 *
1. Germany	X	X	X	23. France	X	X	X
2. Argentina	X	X	X	24. The Netherlands	X	X	X
3. Australia	X	X	X	25. Hong Kong			X
4. Austria	X			26. Israel	X	X	
5. Barbados		X		27. Italy	X	X	X
6. Belgium	X	X	X	28. Japan	X	X	
7. Bermuda		X		29. Lithuania	X	X	
8. Brazil		X	X	30. Mexico	X	X	X
9. Bulgaria	X	X	X	31. Nicaragua	X	X	
10. Canada		X	X	32. New Zealand	X	X	X
11. Chile	X	X	X	33. Panama	X	X	X
12. China	X		X	34. Peru	X	X	X
13. Colombia	X	X	X	35. Portugal	X	X	X
14. Cuba		X		36. United Kingdom	X	X	X
15. Denmark			X	37. Dominican Rep.			X
16. Ecuador		X		38. Russia		X	
17. El Salvador	X			40. South Africa	X		X
18. Spain	X	X	X	41. Sweden		X	X
19. United States	X	X	X	42. Switzerland	X		
20. Greece	X	X	X	43. Taiwan	X	X	
21. Guatemala	X	X	X	44. Uruguay	X	X	X
22. Guinea-Bissau			X	45. Venezuela		X	X

* Information available as of October.

ANNEX 3
Sample of wines consumed in Costa Rica

United States	
Robert Mondavi Woodbridge Mondavi Opus One Columbia Winery Covey Run Arbor Mist Manischewitz Sutter Home Paul Masson Chardonnay Sauvignon Blanc Pinot Noir Robert Stemmler Ficklin Port Cabernet Sauvignon J.Lohr Estates Pinot Grigio California	Semillon Columbia Crest Pinot Gris Oregon Cabernet Sauvignon Napa Valley Pinot Noir Santa Cruz Mountains Napa Riesling White Riesling J.Lohr Estates Beringer Private Reserve Cabernet Sauv Chateau St. Jean-Chardonnay Cobertt Canyon White Zinfandel Satgs' Leap-Merlot BV Tapestry Reserve Beringer Founders State Merlot Corbett Canyon Chardonnay BV Coastal Zinfandel Gewurztraminer Columbia Crest
Chile	Italy
Don Melchor-Cabernet Sauvignon Sunrise-Cabernet Sauvignon Trio Merlot Casillero del Diablo-Sauvignon Casillero del Diablo-Sauvignon Sunrise-Chardonnay Amelia-Chardonnay Terrunyo-Chardonnay Frontera Resvdo-Merlot	Cecchi Chianti Sartori Villa Mura Valpolicella Uno Di Uno Sagrantino Di Montefalco Batasiolo-Barbera Tomaresca-Pietrabbianca Livio Felluga Illivio Planeta Cometa Farnese Trebbiano D'Abruzzo Riunite Reggiano Lambrusco Doc
France	Spain
Sichel Bordeaux Louis Jadot Bourgogne Pinot Noir Chataeau Potensac Partager Hugel Gentil Sichel Bordeaux Blanc Louis Jadot Chablis B&G-Vouvray Partager	Marques de Caceres Rene Barbier Viña Mayor Crianza Penascal Tempranillo Enate Chardonnay Marques Caceres Rene Barbier Penascal Tempranillo Castellblanch Brut Rosado
Germany	Costa Rica
Blue Nun Qualitätswein Zeller Schwarze Katz Moselblumchen Waldracher Laurentiusberg Trabener Wurzgarten Spatlese Blue Nun Riesling Blue Nun Merlot	La Casa de La Garita Teber Don Teóilo

ANNEX 4**Costa Rica, Selected wine importers and marketers**

COMPANY: AJM Representaciones Comerciales S.A.
CONTACT: Alejandro Jiménez Meza, General Manager
PHONE: (506) 256-5219 / 2218690
FAX: 256-2893
E-MAIL: ajmrep@racsa.co.cr

COMPANY: ALPISTE
CONTACT: Pietro Poma Murialdo, General Manager
PHONE: (506) 296-4263 / 231-6153
FAX: (506) 231-7432
E-MAIL: alpiste@racsa.co.cr

COMPANY: ALPRE S.A.
CONTACT: Dennis González, Market Analyst
PHONE: (506) 272-0982
FAX: (506) 272-5520
E-MAIL: dennisgonzalez@alpre.co.cr

COMPANY: ASEHOT S.A.
CONTACT: Michael Seaward, Director
PHONE: (506) 235-7151
FAX: (506) 235-3373
E-MAIL: mseaward@racsa.co.cr

COMPANY: BASKIT
CONTACT: Leonardo Baquero
PHONE: 370-0866
E-MAIL: lbarquero@baskitar.com

COMPANY: CANACHIL S.A
CONTACT: Ian Mc Lennan, President
PHONE: (506) 239-2571
FAX: (506) 239-2571
E-MAIL: canachilsa@racsa.co.cr

COMPANY: CORPORACIÓN MEGADOCK S.A.
CONTACT: Carlos Loo, General Director
PHONE: (506) 258-2829 / 256-9309
FAX: (506) 256-9253
E-MAIL : megadock@racsa.co.cr

ANNEX 4 (Cont.)

COMPANY: CORPORACIÓN MOMBLA
CONTACT: Javier Monge, Partner
PHONE: (506) 236-8926 / 380-6612
FAX: (506) 240-2376
E-MAIL: javiermonge@hotmail.com

COMPANY: DISPAL S.A.
CONTACT: Patricia Rodríguez, Sales Manager
PHONE: (506) 280-8217
FAX: (506) 224-2028
E-MAIL: paticiarodriguez@dispalcr.com

COMPANY: DISTRIBUIDORA YAMUNI
CONTACT: Miguel Yamuni, President
PHONE: (506) 227-2222
FAX: (506) 227-2535

COMPANY: EL PLATA S.A.- INTERNATIONAL TRADING
CONTACT: Kenneth Gómez, Imports Manager
PHONE: (506) 255-2322
FAX: (506) 233-3821
E-MAIL: elplata@racsa.co.cr

COMPANY: FRUTAS SECAS S.A. - FRUSEC S.A.
CONTACT: Miguel Freider, General Manager
PHONE: (506) 226-9433
FAX: (506) 226-9564
E-MAIL: frusec@racsa.co.cr

COMPANY: GRUPO CONSTENLA
CONTACT: Juan Carlos Alvarado
PHONE: (506) 254-5566
FAX: (506) 254-8786
E-MAIL: grupo@constenla.com

COMPANY: HOLTERMANN & COMPAÑÍA S.A. (*)
CONTACT: Frederik Holtermann, President
PHONE: (506) 297-1212
FAX: (506) 297-2423 / 297-2012

COMPANY: IMPORTADORA KIKI DEL NORTE
CONTACT: Pietro D'Onghia, President
PHONE: (506) 222-7896 221-8451
FAX: (506) 296-0100
E-MAIL: eurotel@eurotrade.co.cr

ANNEX 4 (Cont.)

COMPANY: INDUDI S.A.
CONTACT: José Frías, General Manager
PHONE: (506) 256-2532
FAX: (506) 233-7267 / 222-1812

COMPANY: LA NACIONAL S.A.
CONTACT: Carlos Esquivel, Assistant Manager
PHONE: (506) 227-9393 / 227-9494 / 227-595 / 227-9696
FAX: (506) 227-9393
E-MAIL: nacional@racsa.co.cr
WEB SITE: www.lanacionalcr.com

COMPANY: PIRQUE
CONTACT: Claudia Bevacqua, General Manager
PHONE: 231-5320
E-MAIL: pirquesa@racsa.co.cr

COMPANY: PROALCE S.A.
CONTACT: Juan José Oviedo, General Manager
PHONE: (506) 220-26-84 / 220-29-10
FAX: (506) 220-27-55
E-MAIL : proalcesa@racsa.co.cr

COMPANY: GRUPO PAMPA S.A.
CONTACT: Pablo Carnevale, Assistant Manager
PHONE: (506) 296-0797
FAX: (506) 296-2736
E-MAIL: pcarnevale@grupopampa.co.cr

COMPANY: WAGNER S.A.
CONTACT: Erick Wagner Ureta, President
PHONE: (506) 223-3013 / 223-434
FAX: (506) 223-6847
E-MAIL: wagner@racsa.co.cr

COMPANY: E y E SEGURA INTERNACIONAL LTD.
CONTACT: Edwin Segura, General Manager
PHONE: (506) 257-9914 / 258-4686
FAX: (506) 221-8279
E-MAIL: reinsa@racsa.co.cr

ANNEX 5
Percentage distribution of consumers by favorite beverage

Beverage	Year		
	1990	1995	2000
Beer	43.7	70.0	65.5
Guaro	15.7	10.7	9.8
Rum	9.1	7.4	7.8
Wine	3.6	4.0	6.0
Eggnog	13.5	2.0	1.2
Another	14.4	5.9	9.7

Source: IAFA, 2003