NielsenIQ

Global State of Health & Wellness 2025 Regional Insights Companion: Latin America (LATAM)

Featured countries

Brazil

Mexico

Unless otherwise noted, all data points throughout this report originate from NIQ's 2025 Global Health & Wellness survey.

Overall health and wellness landscape in LATAM: Trends to watch that are shaping today's industry

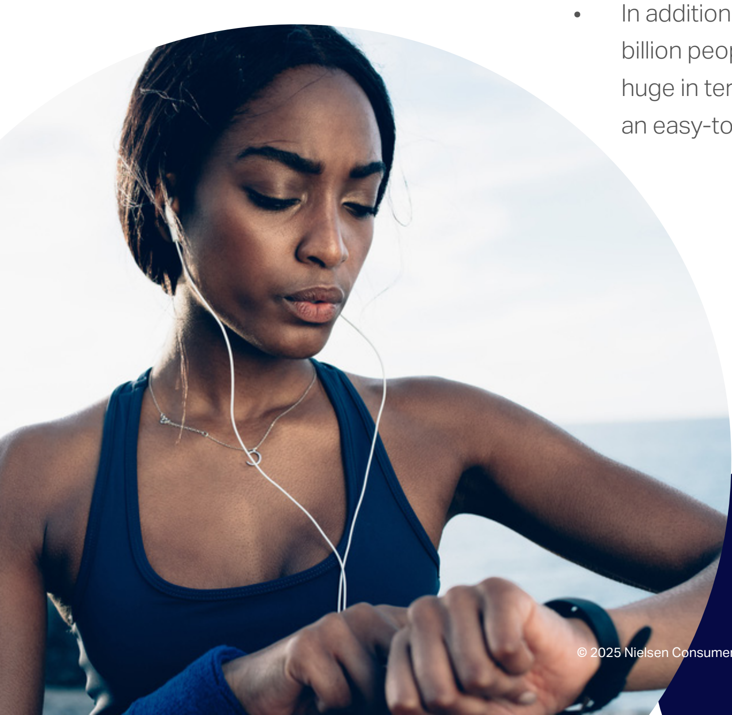
Aging population

Latin America is experiencing a progressive aging of its population driven by diminishing mortality rates and reduced fertility rates. By 2050, the proportion of seniors in the population will be higher than that of children.

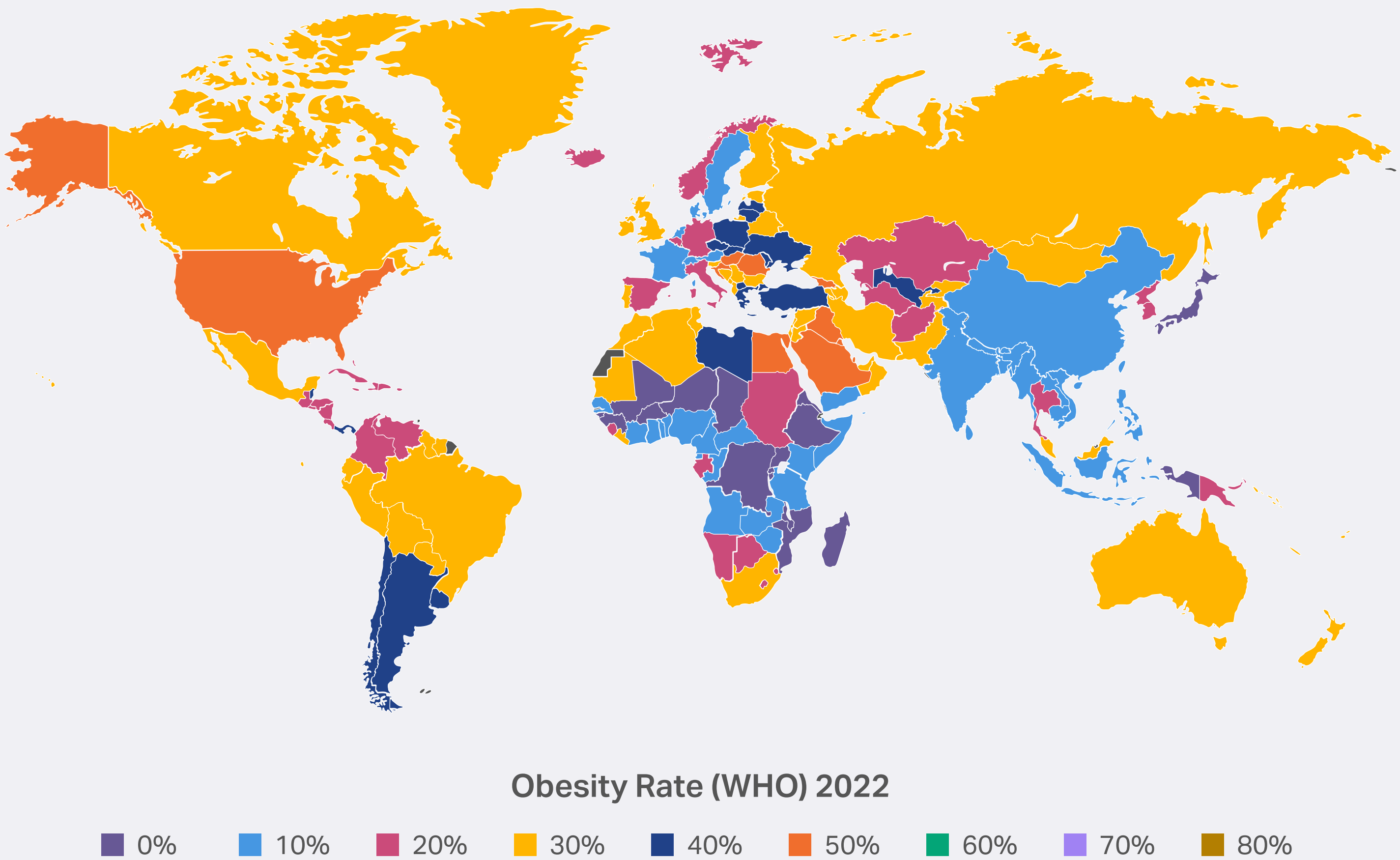
Health equity

Despite universal healthcare increasing within Latin American countries, significant percentages of their populations don't have access to health care. This is due both to economic reasons and geographical barriers.

- Countries such as Chile have comparatively healthy economies and a high Human Development Index. Other countries in the region are still developing or, like Argentina, facing recent economic difficulties, and have corresponding challenges to overcome.
- Within countries, too, there is huge disparity—both between rural/urban populations and lower-/higher-income families. Significant parts of the population can only focus on the necessities of life and can't afford, for example, vitamin supplements.
- In addition to the challenge of large populations (Mexico has a population of 0.2 billion people, and Brazil has 0.13 billion), several countries in Latin America are huge in terms of land mass. This presents disparity in people's physical access to an easy-to-reach health center.



Obesity



Source: The World Health Organization (WHO), Obesity Rates by Country. WHO defines obesity as a body mass index (BMI) greater than or equal to 30 kilograms per square meter of body area (BMI ≥30kg/m²).

Obesity rates within LATAM have increased faster than in any other region and now affect roughly one-third of the population. As a result, diet-related policies have become a priority, with restrictions on the advertising and sales of unhealthy food (food high in sugar, saturated fat, sodium, or calories), mandatory front-of-package (FOP) warning labels, and taxes on junk food (i.e., high in calories but low in nutritional content). These have somewhat improved health behaviors, but obesity prevalence remains on an upward trend across the region.

Brazil and Mexico health and wellness focus (vs. global benchmarks)

Audience engagement

- Consumers in Brazil and Mexico are more likely to describe themselves as proactive in doing things to improve their health and wellness on a regular basis (e.g., exercising, monitoring health metrics, watching what they eat)—standing at 79% vs. 70% global average.
- 77% plan to do more physical exercise in the next 12 months, and 67% plan to take more vitamins/supplements
- 56% say seeking out the latest health and wellness products, diets, and routines to meet evolving health goals is more important to them now than five years ago

Barriers

- The cost of healthier alternatives vs. standard products is the #1 barrier that consumers in Brazil and Mexico say is preventing them from making healthier life choices (55% citing this).
- Availability or difficulty finding healthy alternatives is the #2 barrier, with 35% complaining of this—slightly higher than the global average of 31%.
- Nearly one in three say time is a major barrier.
- However, motivation is slightly better vs. the global average: One in five say lack of motivation is a major barrier vs. one in four globally (vs. nearly one in three in US).

Trust and influence

- One-quarter (26%) of survey respondents say they are held back from making healthier choices due to lack of trust that the product/service will be effective.
- Like other regions, trust is increased if a brand focuses on health and wellness across its entire portfolio—with 42% across Brazil and Mexico agreeing *strongly* that they are more likely to buy from companies of that type.
- Seven in 10 of the population across Brazil and Mexico say they are sometimes triggered by external factors (such as news articles, TV documentaries, advertising,

and recommendations by friends and family) to do things to improve their health and wellness.

- The top factors that are of *significant* influence when deciding which health and wellness products/services to buy are:
    - Recommendation by medical health specialists: 69%
    - Availability of detailed information on its usage, performance claims, and application: 55%
    - Ability to inspect, trial, or sample the product: 54%

Mental health and well-being

- Consumers in Mexico and Brazil have an increased level of focus (more so than many other regions) on the need for mental well-being.
- Significantly more consumers say the following factors are more important to them now than five years ago:
    - 80% looking after their emotional or mental health (vs. 63% global average)
    - 77% getting good sleep (vs. 63% global average)
    - 67% following a regular self-care routine (vs. 50% global average)

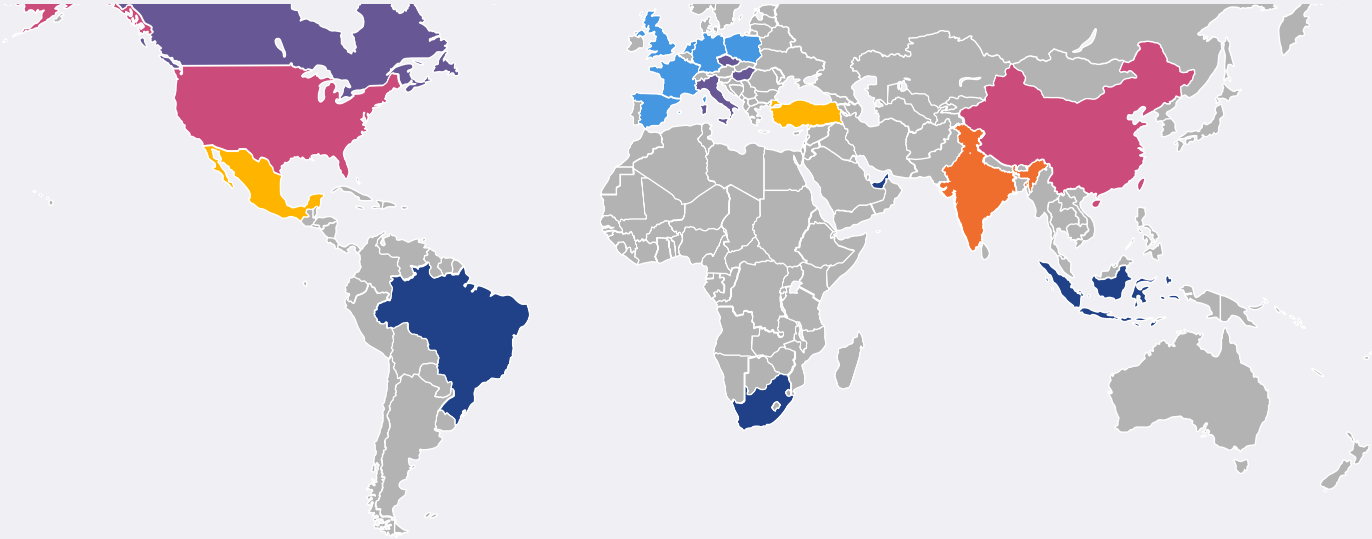
Nutrition

- 74% say healthy nutrition is more important to them now than five years ago, and 43% are willing to pay over 10% more for a product that gives enhanced nutritional benefits, compared with a "standard" product
- Brazil and Mexico also have a higher-than-average percentage of consumers holding a "*very* positive" perception of high-fiber foods (62% vs. 49% global average), superfoods (54% vs. 38%), and high-protein plant-based foods (53% vs. 35%).
    - Well over half plan to buy more of these food types in the coming 12 months.
- Despite the popularity of convenience foods in LATAM, 46% of consumers across Brazil and Mexico say they have a negative perception of ultra-processed foods—that's seven percentage points higher than the global average.

Weight loss

- 70% say exercise and cardio/heart fitness is more important to them now than five years ago; that's significantly higher than the global average of 52%
- 66% say the same for healthy body weight, shape, and muscle tone (compared with 54% globally)
- Consumers' primary motivation for having a healthy body weight is for overall health (81% say this is a *very* important motivation for them), followed by appearance (55%).
- Nearly half (48%) of consumers across Brazil and Mexico are familiar with weight loss drugs (vs. 37% global average), with higher levels of positive perception than other regions (41% vs. 31% global average).
- One in 10 consumers across Mexico and Brazil say they are currently using weight loss drugs, and nearly two in 10 (18%) say they have used a weight loss drug in the past.
- Brazil and Mexico consumers are also more likely to be willing to use a weight loss drug in the future, if recommended by a healthcare professional, with 61% saying they would (vs. 43% global average)—**the highest of any region**.

Percentage holding "very positive" views of weight loss drugs



26.a) "Very positive" NIQ 2025 Global Health & Wellness survey results

[2% to 5%] [5% to 8%] [8% to 12%] [12% to 17%] [17% to 19%] 32%

Source: NIQ's 2025 Global Health & Wellness survey, fielded Jan.–Feb. 2025, 19 countries
Map visualization is powered by NIQ Partner Network member Mapidea

Conscious buying

- Awareness of, and support for, "conscious buying" when making health and wellness purchases is higher across Brazil and Mexico vs. other regions:
  - Across Brazil and Mexico, 67% are familiar with the concept of conscious buying (vs. 57% globally).
  - 82% say it's important to them that their health and wellness purchases are also ethical and/or environmentally friendly
  - Leading motivations for wanting health and wellness purchases to be ethical and/or eco-friendly are personal wellness benefits (73%), followed by environmental sustainability (56%).
- Related to the primary motivation for conscious buying being personal wellness benefits, 51% of consumers in Brazil and Mexico "agree *strongly*" that they worry that environmental issues (e.g., pollution and climate change) are having an adverse impact on their current and future health and wellness.
  - That's 20 percentage points higher than the global average, making this a key issue in the region.
- Additionally, 40% are willing to pay over 10% more compared with a "standard" product for cruelty-free or higher animal welfare products—significantly higher than the global average of 30%.
- 34% are willing to pay over 10% more compared with a "standard" product for socially responsible products (e.g., ones that support communities, vulnerable populations, charities, etc.); this is 9 percentage points higher than the global average

Health tech

- Consumers in Brazil and Mexico display a high affinity for heath-focused technology products:
  - 85% say they'd prefer a technology product that offered extra health and wellness features (e.g., health tracking in a smartwatch, steam-wash function in a washing machine, low-fat cookers such as air fryers, more effective air water filtration) over one that did not (vs. 74% global average)
  - 81% believe health-focused technology products are effective in helping them improve their health and wellness
- The leading drivers for consumers in Brazil and Mexico for buying health tech include:
  - Improving mental health and well-being: 53%
  - Cooking more healthily: 52%
  - Monitoring my diet and nutrition: 46%

Opportunities for manufacturers and retailers selling in Brazil and Mexico

Across Brazil and Mexico

- ***78% would use a digital device or app that automatically monitors their daily health and recommends actions based on their individual health preferences***
- ***75% would use an app or personalized shopping list to ensure the products they purchase align with their health priorities***

LATAM consumers are likely to be battling opposing desires when it comes to weight loss. Many prioritize body image and personal aesthetics (toned—not just slim—bodies), but, as a culture, they also love to indulge in eating, drinking, and snacking. Convenience products are popular, tied to a large percentage of the population being low-income and/or time-poor (with jobs clustered in city centers, long commutes to get to work are the norm).

This creates opportunity for CPG/FMCG and Consumer Tech products that directly support people in achieving and maintaining healthy body weight and shape, while also being convenient, affordable, and enjoyable. On the FMCG side, for example, this could include low-fat and protein-enriched snacks such as yogurts and protein bars, low-sugar energy drinks, or affordably priced meal kits and low-fat or low-calorie ready meals.

Health tech shows high potential in LATAM. Low-fat cookers are already popular across Brazil and Mexico, with 41% saying they have bought one in the last 12 months, and a further 29% saying they plan to buy one in the coming 12 months. Added to this, the convenience and relatively low cost of wearables such as smartwatches and fitness trackers—especially Chinese brands—and health and relaxation apps also make these highly relevant for lower-income consumers and those in remote rural areas—enabling them to self-track their core health metrics, such as physical activity, heart rate, sleep, stress level, and more.

Products and services that support mental well-being are also well-positioned for growth in LATAM. In Brazil and Mexico, eight in 10 consumers are placing more importance on looking after their mental health than they did five years ago. Specifically, they aim to focus their self-care routines on spending quality time with family and friends, exercising and being in nature, using vitamins and skin creams, and relying on massages for physical and mental relaxation. Affordable products and services that deliver or enhance those activities are expected to do well.

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About NIQ

NielsenIQ (NIQ) is a leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. NIQ combined with GfK in 2023, bringing together two industry leaders with unparalleled global reach. Our global reach spans over 90 countries covering approximately 85% of the world's population and more than $7.2 trillion in global consumer spend. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms—NIQ delivers the Full View™.

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