Brand Footprint

Latam 2025

Decoding brand choices in Latam

Worldpanel
by Numerator

Worldpanel by Numerator

Welcome to Brand Footprint Latam 2025

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Brand Footprint 2025 in the words of our Executive Leadership

Brand Footprint provides us with a unique opportunity to pause and reflect on the evolving relationship between consumers, the brands they choose and the channels where they buy them.

In our 2025 BFP Latam edition, this reflection feels more relevant than ever.

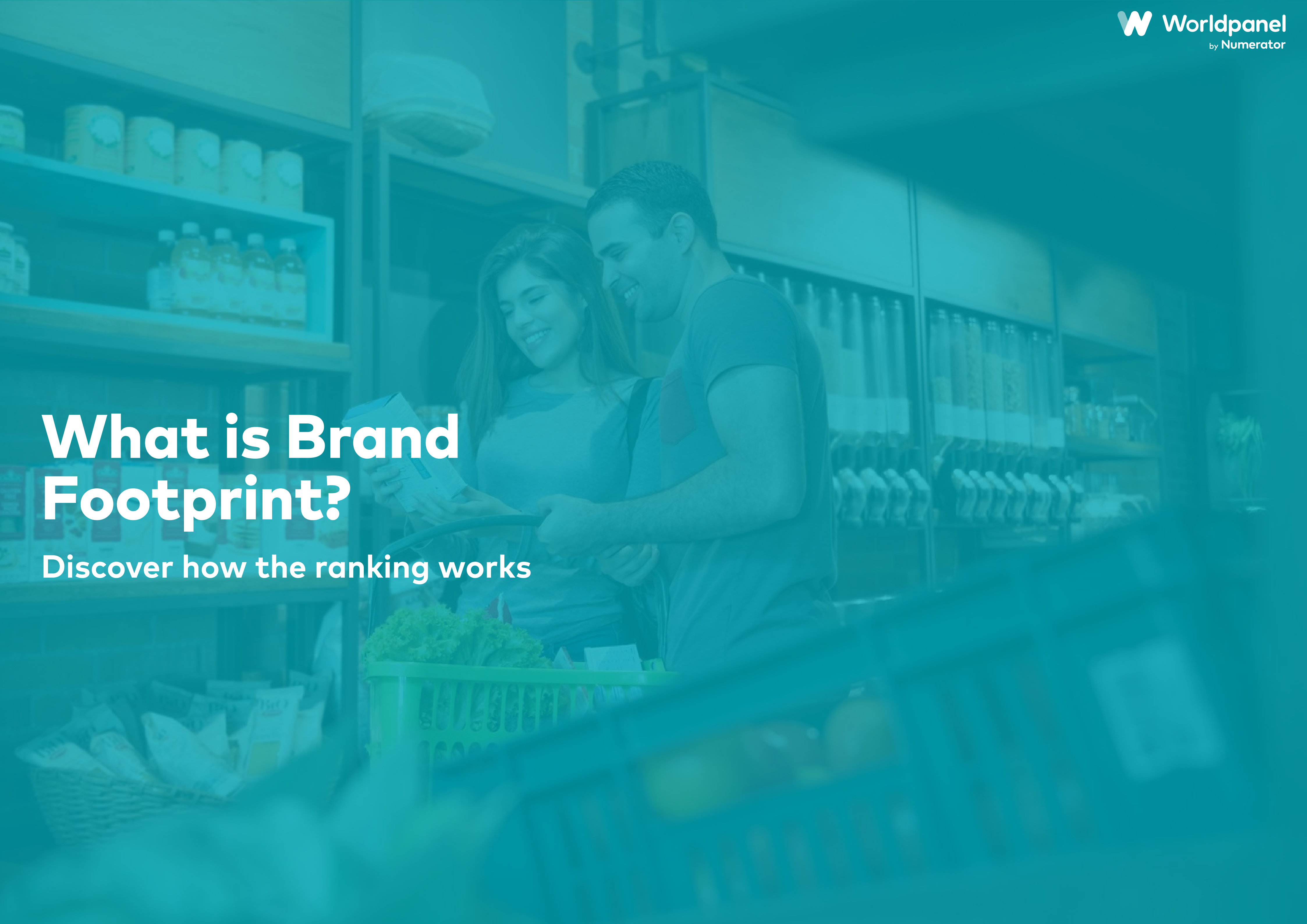
For over a decade, Brand Footprint has been more than just a report – it has become a benchmark for brand performance and a trusted guide to navigating the complexities of the FMCG landscape across our region.

This year, we analysed more than 52 billion brand choices across Latin America, uncovering the forces that are shaping growth, loyalty and consumer behaviour.

What we see is both a challenge and an opportunity: fewer brand choices, lower frequency and a more competitive environment. But also, a renewed chance for brands to connect, differentiate and grow.

At Worldpanel by Numerator, we are committed to helping brands not only understand these shifts – but also to enable you to act on them. Our focus is to empower you with the insights that matter by decoding shopper behaviour, so you can make decisions that drive meaningful, sustainable growth.

We hope this year's Brand Footprint inspires you to have bold reflections, explore new strategies and continue building brands that truly matter to people.



What is Brand Footprint?

Discover how the ranking works

Understanding Brand Footprint

Knowing who buys your brand and where is a critical part of the success equation for brand growth. At Worldpanel by Numerator we globally track more than 563 billion consumer-brand interactions and 4 billion consumption moments each year across more than 65 markets (including partners).

In Latin America we cover 15 markets and 90 percent of the population. That's nearly 6,000 brands, making this year's Brand Footprint our most comprehensive coverage of the Fast-Moving Consumer Goods (FMCG) economy ever. It's a precision look at why and where people chose brands.

A ranking of global brands
What do we mean by 'global'?

The goal is to help brands decode how and why people buy – both online and in-store – to drive sustainable growth and spot market opportunities.

The Brand Footprint report employs an unique metric known as Consumer Reach Points (CRPs) to measure and compare the success of brands across different markets and regions.

Each CRP represents a single instance of a shopper choosing a brand, integrating data on population, penetration and consumer choice to provide a holistic view of brand

Key definitions

Brand Definition:
Brand Footprint only covers consumer brands; retailer own-label brands are not included. Brands listed include all variants, categories and formats that sit within them – for instance Pantene includes all of its shampoo, conditioner, hair treatment, hairspray and hair oil products.

Defining Global, Regional and Local Brands:

To be considered global a brand must have a presence across at least three continents and not get more than 90% of total CRPs from one market. To be a regional brand, a brand must have apresence in at least two markets in one continent while a local brand will be present in one market.

Brand size classification:

The size of a brand is quantified using its penetration percentage, which reflects the proportion of households purchasing the brand across the year:

- **Small Brand:** Penetration ≤ 10%
- **Mid-Size Brand:** Penetration between >10% and ≤30%
- **Large Brand:** Penetration >30%
- **Super Brand:** Penetration >70%

The categories:

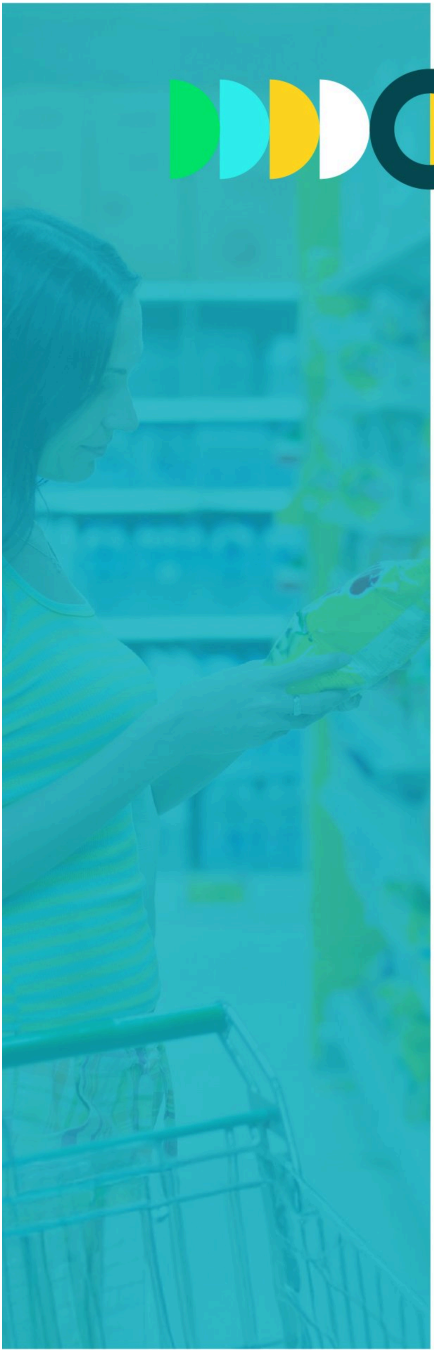
The ranking comprises five key FMCG sectors – Beverages, Food, Dairy, Health & Beauty, and Homecare. Non-barcoded Fresh Food, Batteries and Pet Food are not included in the ranking. All data relates to purchases brought into the home to be used or consumed there.

The data period:

The *2025 Brand Footprint* ranking is based on data collected over the 52-week period between November 2023 to the end of October 2024.

The 50:50 game

But it's a 60:40 game in Latam



Analysing 13 years of global Brand Footprint data has revealed a pattern that repeats time and time again. Year after year, around half of the world's FMCG brands increase their footprint, while the other half shrink. Mathematically speaking, this means that any given brand faces on average a 50% chance of growth, and a 50% chance of decline.

The 50:50 ratio has consistently played out in our global ranking since 2012. However, this year Latin America is bucking that trend – and it's the only region to do so.

The 60:40 split

Following strong growth last year, when 52% of Latin American brands increased their CRPs, the majority – 61% – are now declining. The average decline is also steeper than the average uplift: the region's growing brands have increased their CRPs by 8%, while those losing reach have seen a decrease of 10%.

This performance contrasts starkly with Asia, where 56% of brands are in growth, as well as the US (57%), Europe (52%), and Africa and the Middle East (48%).

It also illustrates how dramatically local market trends can change from one year to the next, reshaping the competitive landscape as they change. It's more important than ever that brands have a sound understanding of their market's trajectory, and the growth environment they're operating in.

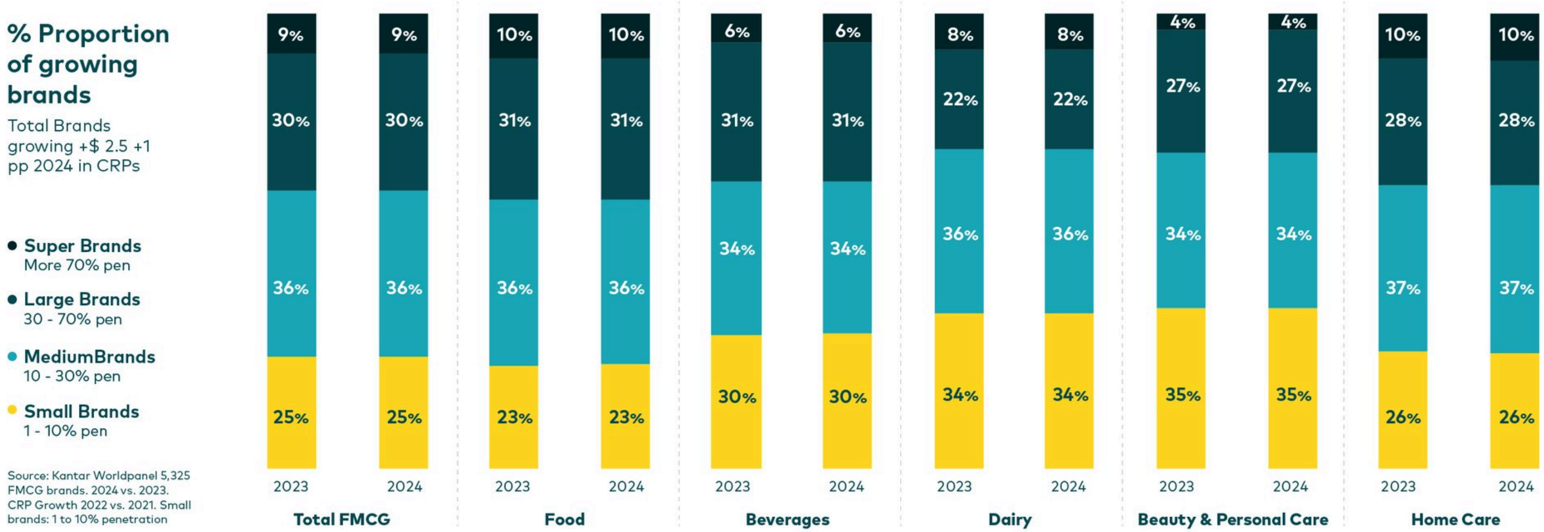
So why has it become more difficult for brands to grow – or even sustain – their footprint in Latin America? We'll take a detailed look at the key factors influencing consumer behaviour in the next chapter, but there are two dominant drivers that need to be recognised.

Fewer choices, less loyalty

FMCG price increases in Latam remain substantial – up 28% over the past two years, according to Worldpanel by Numerator's *Consumer Insights 2025* data. In response, shoppers are making fewer trips to stores, while buying more units and larger packs per trip. Lower purchase frequency translates into fewer brand choices being made – and therefore fewer opportunities to be bought. This reality is consistent across the region.

As a result, whereas most brands in this year's Brand Footprint ranking have increased their value sales, half of them are being chosen fewer times, leading to a drop in CRPs.

Is your brand growing or declining?



In addition, consumers are reprioritising what they choose to put into their FMCG baskets, as they deal with persistent inflation and fluctuating prices. Rather than completely dropping categories, they're making trade-offs to achieve a balance between managing their budgets and not giving up the items they love. This willingness to switch brands makes it harder to repeatedly capture choices.

Reprioritisation has also led to the simultaneous growth of premium brands and cheaper private label brands while mid-tier – or mainstream – brands have lost share.

Shifting the odds

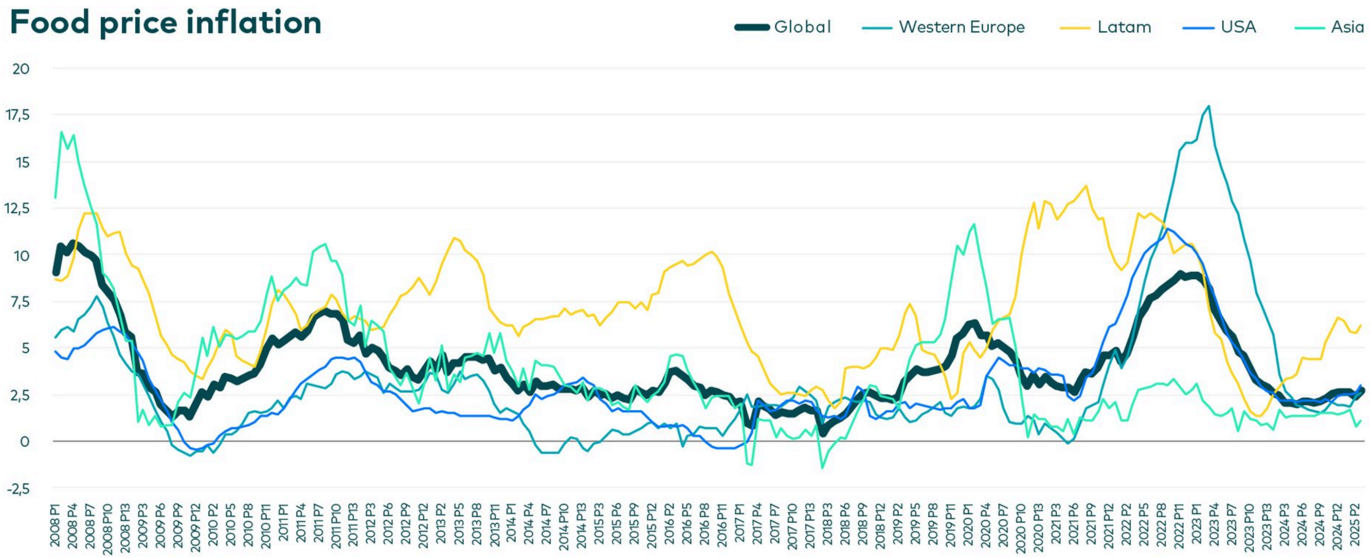
Being on the winning side of the equation – whether it's 50:50, or 60:40 – doesn't have to be a game of chance. The most successful brands manage to improve the odds, by proactively and strategically moving the probabilities in their favour.

Understanding consumers' choices, prioritisation strategies and level of financial comfort will all help brands to figure out how to remain relevant in the decisions they make.

Turning back to our 13 years of global Brand Footprint data, our analysis reveals one factor that plays a greater role in shifting the odds than any other: increased penetration. Since 2012, the brands that have recruited the most new shoppers have achieved the strongest growth.

Market context

And how it's shaping trends in consumer behaviour



Latin America's economy flew in 2024. It outperformed the IMF's advanced economies average with GDP growth of 2.3% compared to 1.4% for competitors.

This success has been driven by a number of factors, notably higher commodity prices (13% of regional GDP), greater foreign investment and lower unemployment (6.7% in 2023 vs. 8% in 2019).

But it's not all rosy, particularly when it comes to FMCG. Food price inflation is significant and at 14% is well ahead of market average inflation of 7%.

In Latam inflation has been an economic constant, and most recently a mix of external factors such as rising commodity prices and internal factors such as currency depreciation against the US dollar have accelerated its rise.

That's played out especially for food and is having a serious impact on consumer purchase power. The outlook was much worse during the inflationary peaks of 2022, but in 2024 most countries still had inflation above their pre-pandemic average.

On the one hand, rising inflation drives up overall spend (there's been a 14.1% boost to spending in the region compared to a global rise of 8%) and spend per trip is up 12.4%.

However, with GDP per capita growing by just 1.6% in 2024, many households have had to cut back and reduce basket size to adapt. Thus, while the headline number of $928 annual spend (up 12.8%) seems positive, the detail reveals the number of brand choices in decline.

Future economic outlook is also uncertain. Between January and April 2025, forecasts for Latin America's GDP was cut due to sharper-than-expected downturns in Mexico and Brazil, driven by US tariffs, global trade and financial uncertainty, as well as weaker external demand.

In Mexico and Central America, a key element of GDP is linked not only to exports but also significantly influenced by remittances and the wider uncertainty in the global economy will also have an impact on consumer wallets.

The market-by-market picture

Latin America is not a uniform picture. The northern countries are still on the rise. Colombia, Central America, Peru, Ecuador, and Mexico show positive growth.

These countries have experienced a mix of higher minimum wage increases in the past years – in Mexico, for example, the government has increased it by 20% – and an expansion of more "affordable" retail channels, which allow consumers to bring home a higher volume of goods for fewer dollars when compared to other channels.

The picture for Argentina, Brazil, Chile, and Bolivia, however, is of year-on-year declines, although it's worth remembering that Brazil had a strong growth peak in 2023.

Variation between markets also extends to the retail landscape. Discounters particularly thrive on private labels in countries such as Ecuador, Colombia, Mexico, and Central America. In all of these markets, private label has increased the number of units sold by more than 10% in the past year.

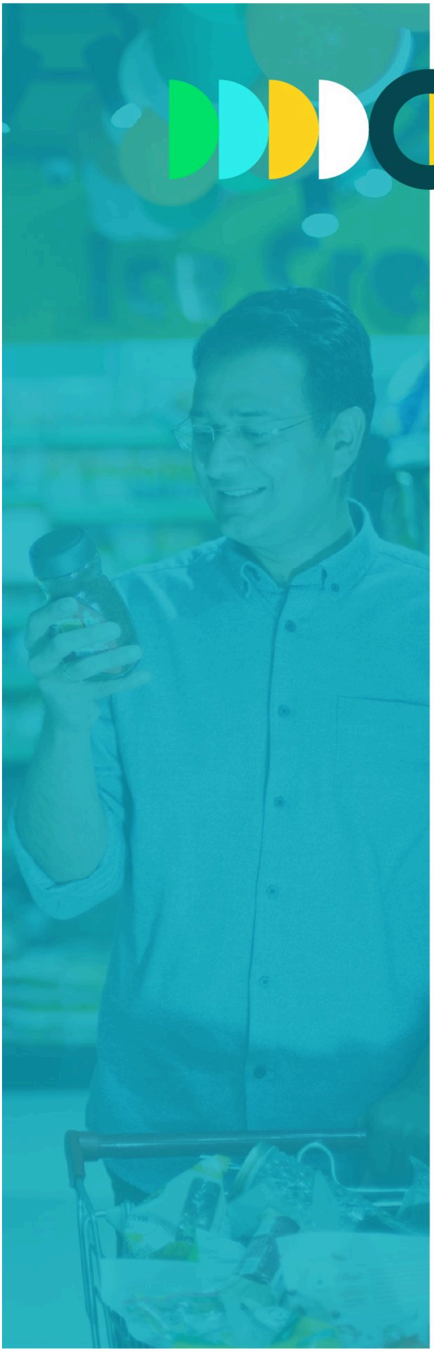
By contrast, in southern markets such as Brazil, Argentina, and Chile, wholesalers provide affordable access to commercial brands, due to their strong value-for-money proposition. In these markets, wholesalers have gained more share than any other channel.

When observing brand choices, it's also worth noting that consumers do not always behave in a uniform or seemingly economically rational manner. Struggling households in Colombia, for example, still spend more than 20% of their FMCG budget on premium items, balanced out by the fact that 27% of their spend goes on private label.

Premium spend in these households is targeted at Personal Care (make-up, fragrances and skincare), while private label wins out in food and especially home care, nearly doubling its relevance compared to premium brands.

Such dynamics can be seen in all kinds of households as consumers try to manage their budgets at a time of rising prices and lead to the mid-tier brands being squeezed out.

COLOMBIA - % of shoppers spending per basket



The winning brands

This year we tracked 52 billion brand choices across 15 markets in Latam. That sounds like a big number but it's actually a 3.4% decline year on year.

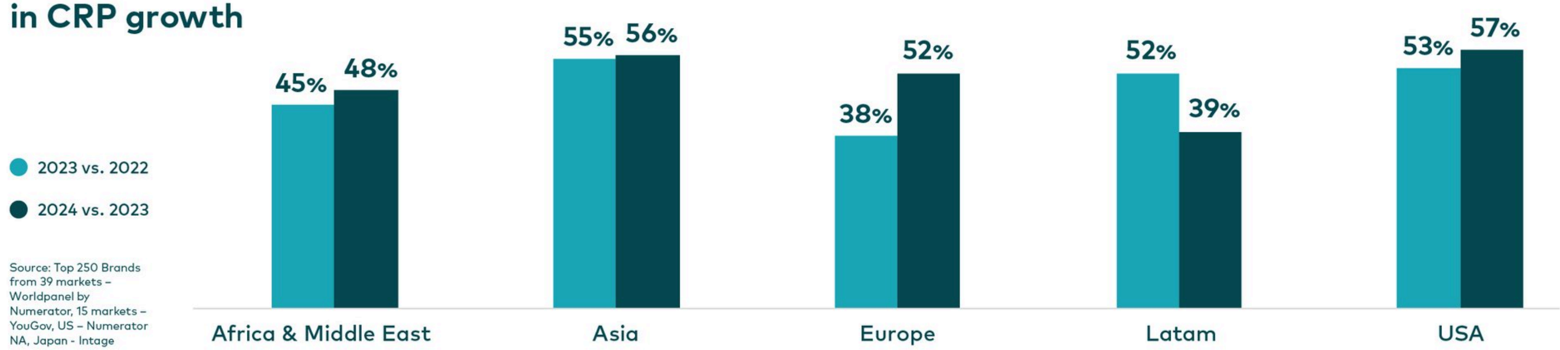
Collectively that's 1.9 billion fewer brand choices. So while the average consumer still makes at least two brand choices a day and the average number of brands bought is increasing, each brand gets less loyalty and fewer repeat purchases.

The overall picture is of more fragmented purchases across a wider range of channels in 2024, with the number of channels up 5% and frequency down 1%.

Most brands can comfort themselves that inflation means they are growing value sales, but half are being chosen fewer times. Lower frequency means fewer opportunities to be bought and many are suffering on that metric.

Overall, more categories are being bought (90% of categories gained penetration) and more channels are being visited. Such experimentation reduces the loyalty consumers have towards each individual brand because purchase patterns shift much more and change between occasions – as a result just 39% of Brands in Latam manage to gain CRPs.

% of brands in CRP growth



Source: Top 250 Brands from 39 markets – Worldpanel by Numerator, 15 markets – YouGov, US – Numerator NA, Japan - Intage

Smaller is better

The winners and losers are not evenly spaced out by brand size. Of the Latam brands that have grown this year, two-thirds (66%) are of medium and large size, with penetration ranging between 10% and 70%, driving an average CRP increase of 2.5%.

Medium-size brands – those with 10-30% penetration – did best with 41% of the 5,846 brands covered by Worldpanel growing and 59% in decline. Penetration was key for medium-sized brands with 48% of growth coming from wider availability alone.

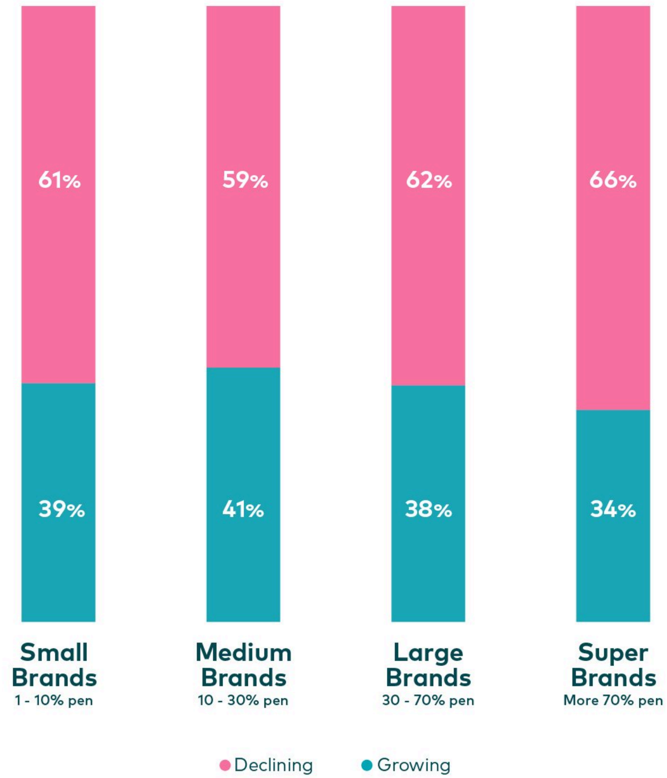
Small brands – those with up to 10% penetration – were also a success with 39% growing. They did particularly well in Dairy and Beauty and Personal Care, accounting for more than a third of growing brands (34% and 35% respectively).

Naturally, it's easier to grow from a small base and 37% of this growth came from penetration improvements alone but 24% was also due to frequency rises.

The scenario is more challenging for the region's super brands – those with penetration above 70% – where only 34% have increased their CRPs this year. The No. 1 brand Coca-Cola, for example, saw a decline of 4.7% in overall CRPs and was chosen 100m fewer times than in 2023.

In fact, most of the top 5 most chosen brands saw CRP's decline: In addition to Coca-Cola, Pepsi saw a 4.9% decline, with dairy brand Lala (down 5.2%) and food brand Bimbo (down 5.9%) also hit. In the Top 5 only Colgate saw an increase, with a 0.1% rise in CRPs for the region's No. 2 Brand.

Sizing the prize



Source: Kantar Worldpanel 5,325 FMCG brands. 2024 vs. 2023. CRP Growth 2022 vs. 2021.
Small brands: 1 to 10% penetration.

Brand vs Channel

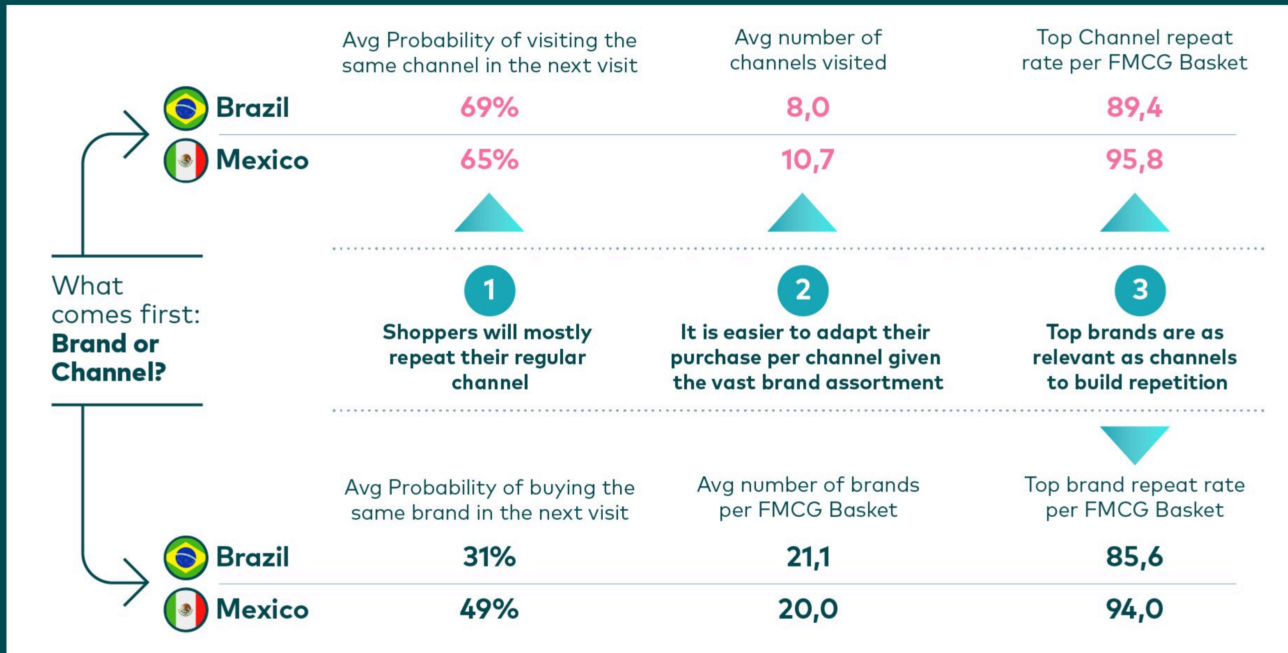
The first step on the consumption journey is deciding where to buy your FMCG needs but brand preferences also play a part in that decision.

Across Latam we see consistent omnichannel behaviour – with nine channels being used per household on average each year – but the appeal of value-for-money channels is rising. While there are fewer brand choices at a total market level, channels such as wholesalers and discounters provided brands with more than 400m new moments of truth in the past year.

Wherever consumers chose to shop, however, there is still some loyalty. In Mexico and Brazil, for example, the probability that a visit to a given channel will be followed by another is 65% and 69% respectively. The wider range of brand choices, particularly in modern retail, means it's easy to adapt your basket to changing budgets without being forced to visit another channel.

Nevertheless, shoppers are visiting more channels than ever before as they actively search for better options to offset price increases.

At the same time however, when we compare purchase decisions from shop to shop, we see the same top brands and household names in most of them. Top brands are as relevant as channels when it comes to building repetition. In Brazil and Mexico, for example, top brand repeat rates are 85.6% and 94.0% respectively.



Announcing the most chosen brands in Latam

The five most chosen FMCG brands in Latam

Rank	Brand	CRPs (m)	growth in Consumer Reach Points
1	Coca-Cola	2,873	-4.7%
2	Colgate	804	+0.1%
3	PEPSI	598	-4.9%
4	LALA	534,4	-5.2%
5	BIMBO	533,9	-5.9%

Source: Brand Footprint 2025: 15 markets - Worldpanel by Numerator

Top 25 Latam ranking

Rank	Brand	CRPs (m)	Change
6	Maggi	448	-8.2%
7	Sadia	377*	+5.3%
8	Nescafé	338	-6.1%
9	Tang	332	-3.7%
10	Del Valle	310	-1.4%
11	Dove	291	+8.3%
12	Knorr	286	-7.7%
13	Sunsilk	285	+5.2%
14	Hellmann's	283	+2.8%
15	Rexona	272	-2.9%
16	Fanta	261	-4.4%
17	Nissin	253	-5.2%
18	Omo	251	-0.3%
19	Nestlé	249	-2.4%
20	Soya	242	+2.6%
21	Qualy	238	-2.1%
22	Palmolive	226	-1.6%
23	La Moderna	219	-4.4%
24	Cheetos	214	-5.9%
25	Nivea	198	+1.5%

Source: Worldpanel Division, Kantar, Brand Footprint 2024

*Regional ranking excludes unpackaged products sold in bulk

Top 10 FMCG brands gaining penetration regionally

Rank	Brand	
1	Dove	3.2
2	Comfort	2.8
3	OFF!	2.5
4	POWERADE	2.3
5	L'ORÉAL PARIS	2.2
6	Baygon	2.4
7	OMO	2.4
8	Cif	2.4
9	PRINGLES	2.0
10	sunsilk	1.9

Source: Worldpanel Division, Kantar, Brand Footprint 2024

*Regional ranking excludes unpackaged products sold in bulk

Penetration power: the path to brand growth

It's a fact that to be chosen more often, more people must first choose you. And in Latin America, 86% of the FMCG brands that grew their footprint in 2024 did so by building their buyer base.

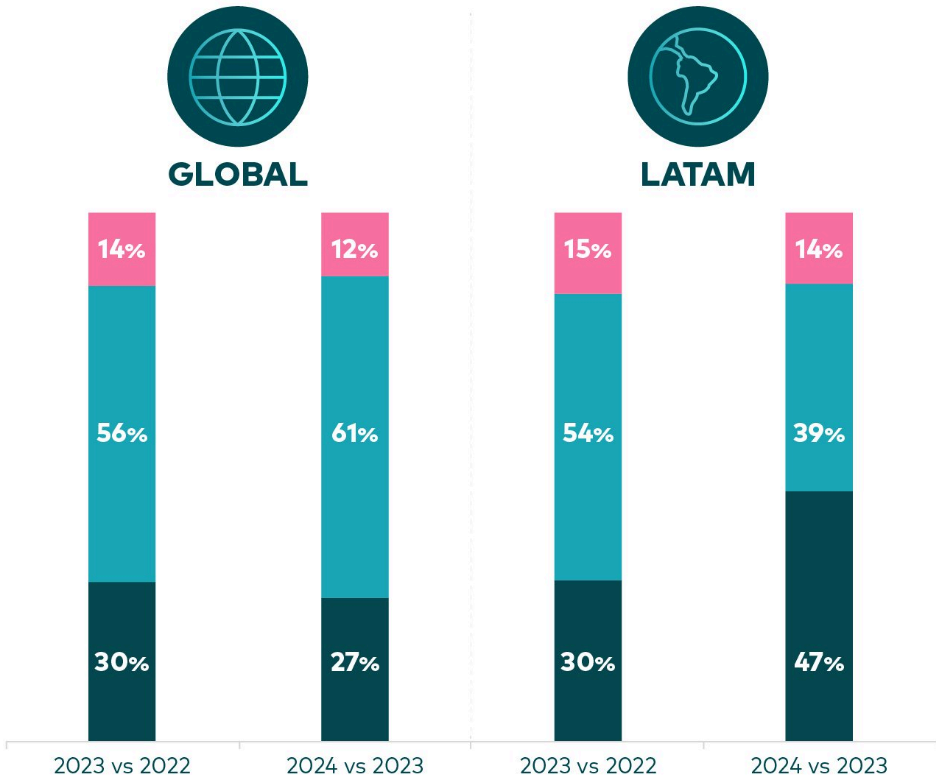
Household impact

Brand growth drivers

86%

of winning brands do so by improving penetration

- Frequency Only
- Penetration & Frequency
- Penetration Only



Similar to the 50:50 equation, our global Brand Footprint data shows us that on average half of all brands manage to expand their penetration in any given year. A strategic focus on boosting reach therefore remains the most crucial driver of a brand's growth.

This could be accomplished by diversifying the product portfolio, targeting new occasions, entering new markets, or conquering white spaces, for instance.

What's important is that the principle is consistent regardless of a brand's size. In Latam, large and super brands are increasing their penetration the most – however only smaller brands are also managing to sustain purchase frequency.

Brands declining in Latam

After strong growth last year, most brands are declining now

Brands that are growing increase by **8%** in CRPs, while declining brands decrease by **10%**

CRP Growth vs. 2023

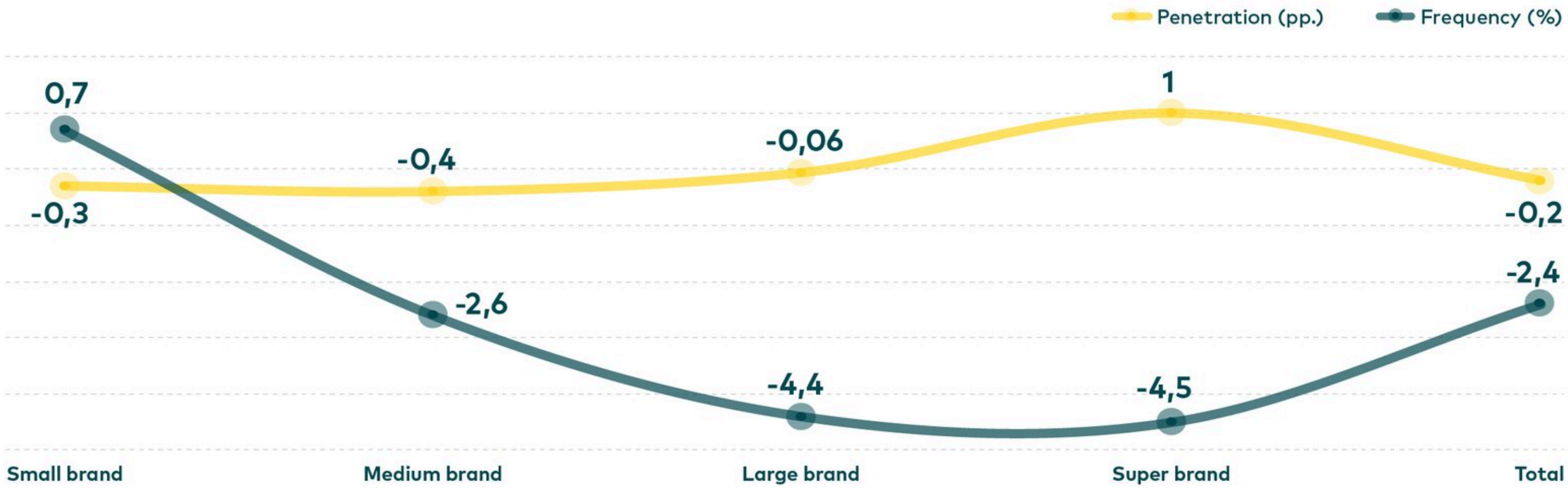
39% Growing brands

61% Declining brands

Based on the Top 250

Super brands expand their reach – but lose repeat buyers

Small brands are the only managing to sustain frequency



Source: Kantar Worldpanel, Numerator, GfK. 37,058 FMCG brands. 2022 vs. 2021

The bar has been raised

Over the years, it has become more difficult to use penetration as a lever to build brand footprint. From 2013 to 2019, the brands that grew their CRPs gained an average of 1.2 penetration points (pp). Over the past five years, however, this average has increased to 1.6pp.

Top 10 FMCG brands gaining penetration regionally

Rank	Brand	pp
1	Dove	3.2
2	Comfort	2.8
3	OFF!	2.5
4	POWERADE	2.3
5	L'ORÉAL PARIS	2.2
6	Baygon	2.4
7	OMO	2.4
8	Cif	2.4
9	PRINGLES	2.0
10	sunsilk	1.9

Source: Worldpanel Division, Kantar, Brand Footprint 2024
*Regional ranking excludes unpackaged products sold in bulk

The Latin American brands that attracted the most new buyers this year are almost all different from those in last year's Top 10. The penetration gains achieved are also smaller: Pepsi was the leader in last year's report, with a rise of 6.4pp, twice the 3.2pp increase earned by this year's champion, Dove.

Omnichannel shopping behaviour requires brands to have a strong presence across multiple channels, to reach the maximum number of buyers. Latam shoppers are visiting more channels than ever in their quest to find the best-value options — averaging nearly 10 different channels visited per year, according to Worldpanel by Numerator's Consumer Insights 2025 data.

This challenging growth environment makes it more important than ever to uncover in-depth knowledge about who your non-buyers are, and why they don't currently purchase your products in addition to a strategy that drives repeat purchasing among those that do. Just because a buyer purchases your brand today, doesn't mean they'll do so again.

In our Brand Stories chapter, you can read about how a number of winning Latam brands have overcome the obstacles to growing their buyer base and achieving penetration-led growth.

Brand stories

	Coca-Cola	PEPSI
Penetration (pp. vs. PY)	**93.5** +1.3p	**52.3** -0.7p
Frequency (% vs. PY)	**22.9** -1.7	**8.5** -0.4
CRPs (% vs. PY)	**2873** -4.7%	**598** -4.9%

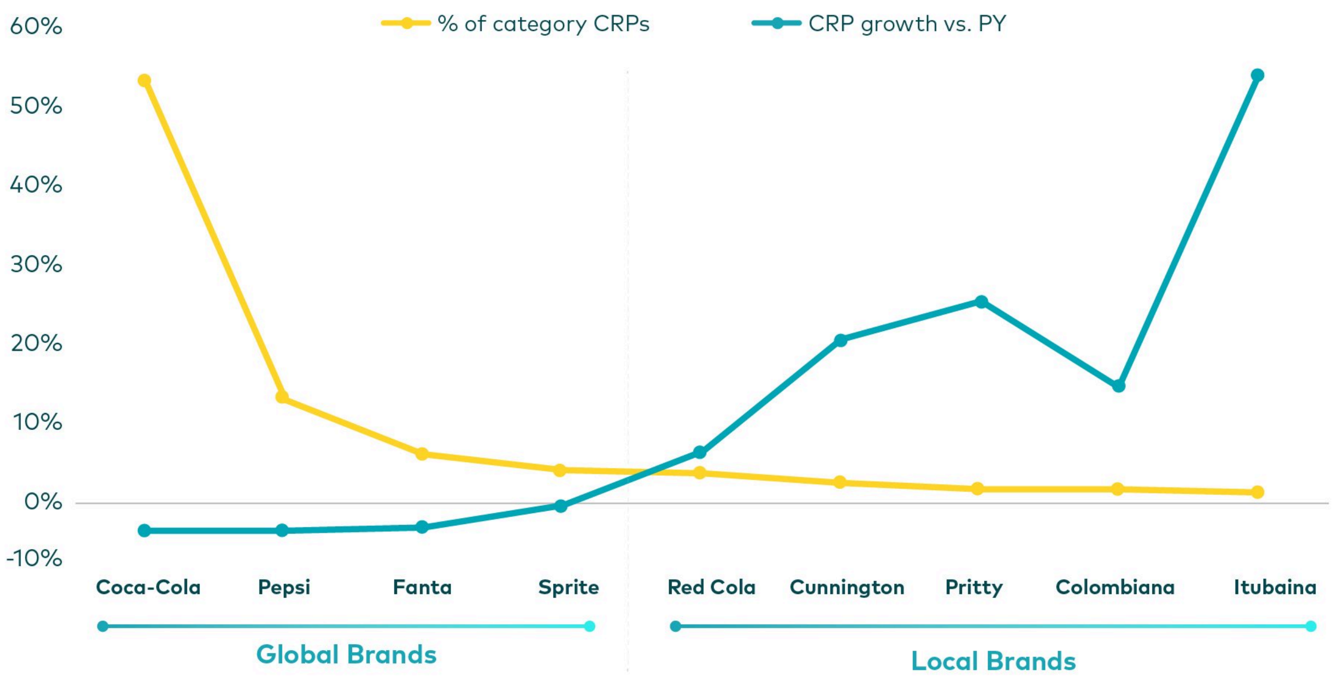
For a long-time they were the kings of the soft drink category, but Coke and Pepsi are facing a new set of local rivals. Tutti-Frutti flavoured Itubaína from Brazil was the most impressive performer in 2024 gaining 53.9% CRPs year on year.

The rise of local brands adds a new challenge in a category that is being transformed by a number of factors. There was a drop of 316m CRPs across the category (the biggest for any category in the region) as brands struggled to retain frequency.

A major factor has been the decline in Traditional Trade, which plays a key role in regular purchases and is in decline, but other factors such as health are also important.

Nearly nine out of 10 (89%) of Latin Americans say they have a negative perception of sugary beverages and 38% say they want to reduce consumption in the next three months.

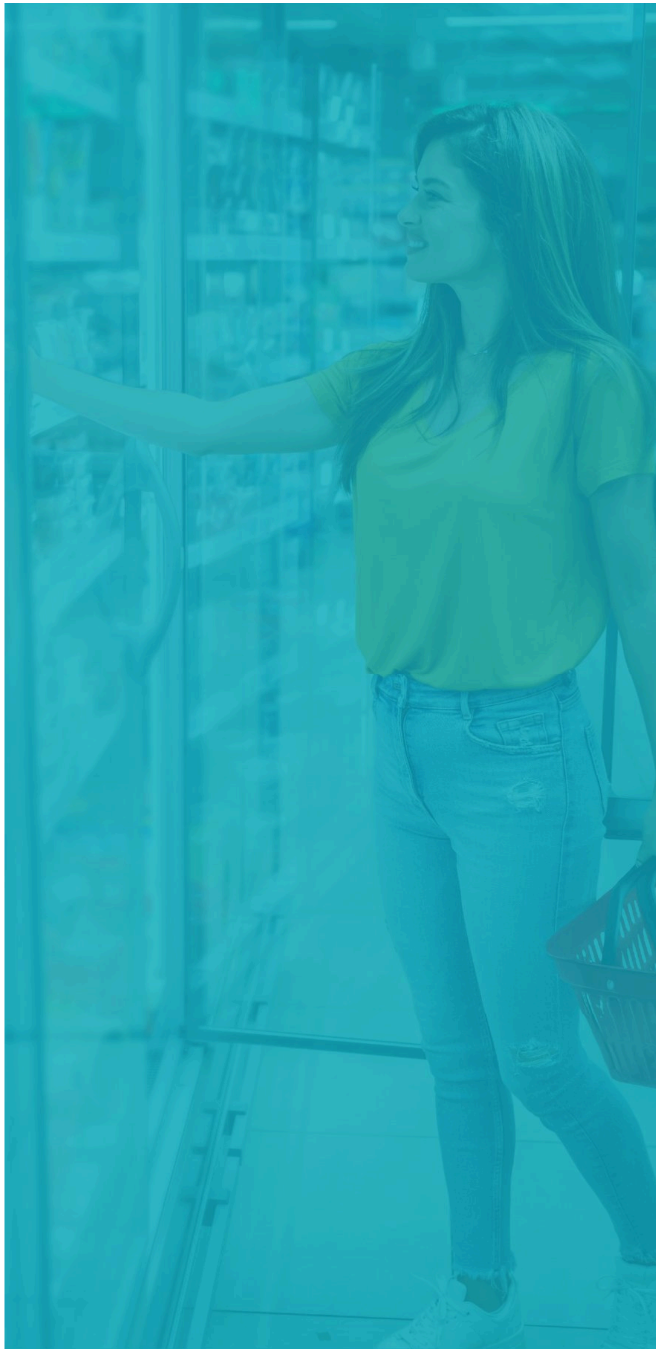
Soft Drinks – CRP performance



The soft drinks category lost overall **316M CRPs** (the biggest category drop in Latam)

The overall drop in FMCG **Shopping Frequency** has impacted this category dependent on the Traditional Trade

Health & Wellness Trends are other sources of change. Some 89% of Latin Americans say they perceive sugary beverages as negative, and 38% say they wish to reduce consumption of sugary soft drinks in the next 3 months



15.6%
Regional penetration

+2.0%
Penetration points

+3%
Frequency vs. YA

+24
Positions gained
in regional ranking

Pringles has defied the demographics to grow across the social spectrum, boosting CRPs even in households where income is tight.

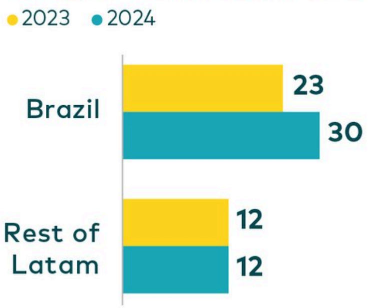
Data from Brasil shows a rise of 6% in penetration in households defined as "Managing" – see definitions in chart below – as well as a 4% boost in those defined as "Struggling".

And the brand hasn't forgotten the more affluent. Consumers defined as "comfortable" have seen a five percent boost in penetration.

This strong performance is built on three pillars, local production, which improved affordability, innovation to create new flavours tailored to Brazilian tastes – such as churrasco, cheddar & bacon, and localized cheese variants – alongside globally recognized flavours, and a fun, premium brand positioning.

While the brand has seen CRPs stay level in other markets, in Brasil it is up to 30m in 2024, a significant boost from the 23m in 2023. This success has helped drive regional penetration up 2% and frequency up 3%.

Pringles – CRPs (Millions)



Source: Brand Footprint 2025: 38 markets – Worldpanel by Numerator, 15 markets – YouGov, US – Numerator NA
[1]Pressure Groups:

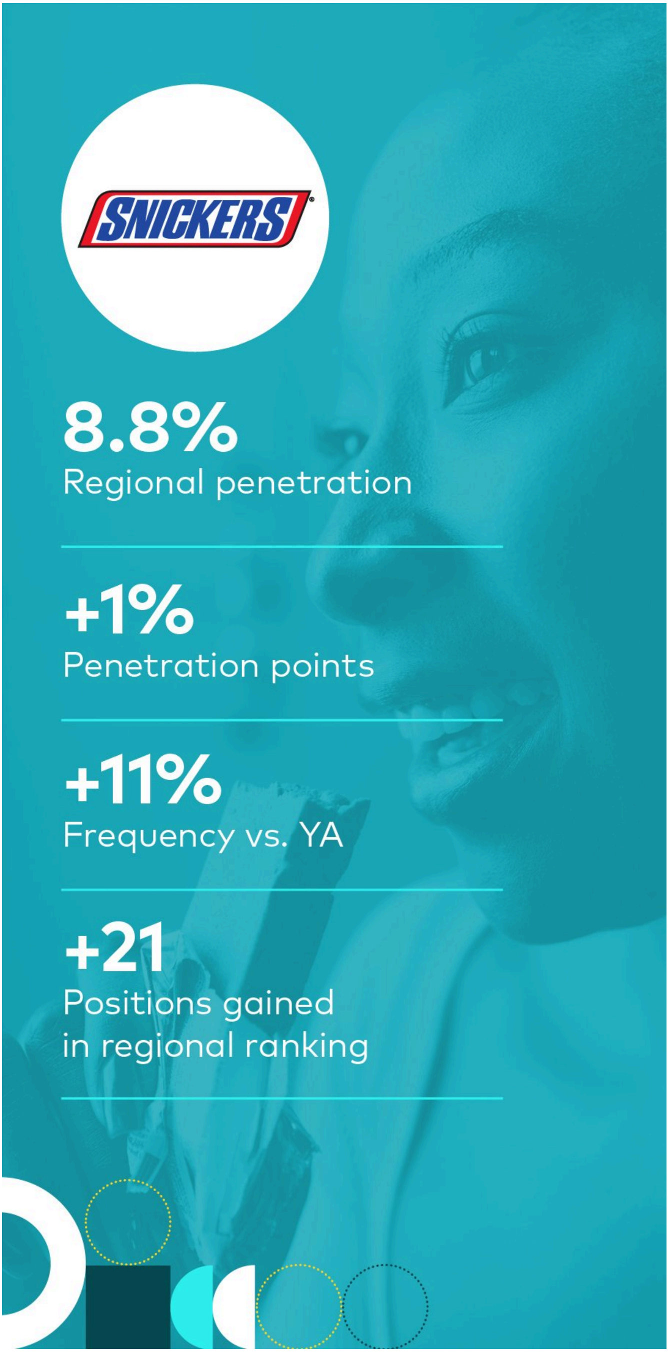
Pringles – Penetration gains in Brazil
(per households in different Economic Pressure Groups[1])

Price Index: 169

Managing: We need to **budget carefully** and limit some spending to afford what we want or need.

Comfortable: We live in **financial comfort** at home and can afford most of the things we want or need without restrictions.

Struggling: All our **income goes to monthly expenses**, and it's not enough to cover everything.



8.8%
Regional penetration

+1%
Penetration points

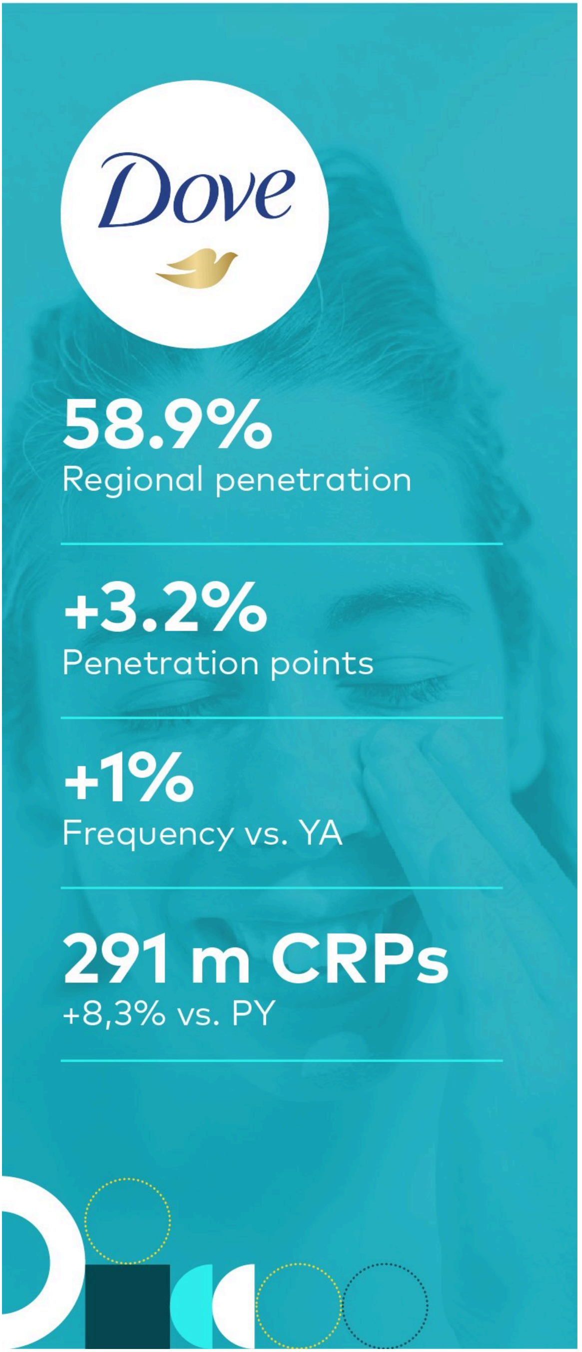
+11%
Frequency vs. YA

+21
Positions gained in regional ranking

Snickers has become more than just a chocolate and peanut snack in Brazil in 2024. A range of variants offering new tastes connected to local consumer demand enabled the brand to convert more shoppers more of the time.

The strategy – originally launched in 2023 – has seen a range of new permanent and limited-edition flavours reaching the market. These include Morango (Strawberry) – released in January 2024 and Chocolate Branco (White Chocolate) — added in late 2024, which swapped the traditional milk chocolate cover for white chocolate.

It's also a rare example of a brand growing predominantly through frequency, because while penetration is up 1% regionally and 2% in Brazil, frequency has grown by 11% regionally, helped by a rise in CRPs which are up from 11m to 14m in the region's biggest market.

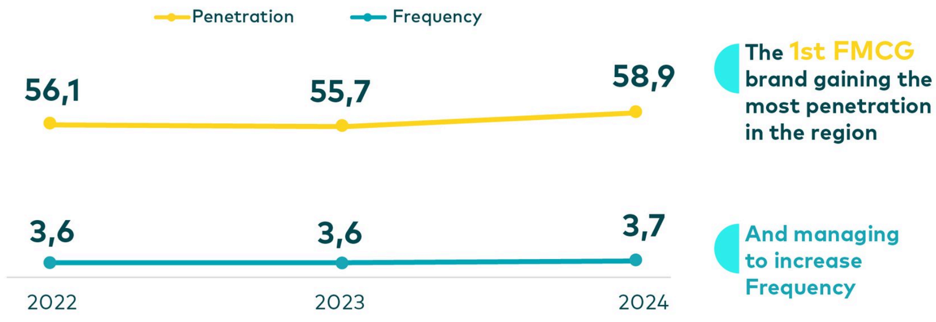


While other superbrands have struggled in 2024, Dove has enjoyed the sweet smell of success, gaining more buyers than any other across the region and boosting penetration by more than any other.

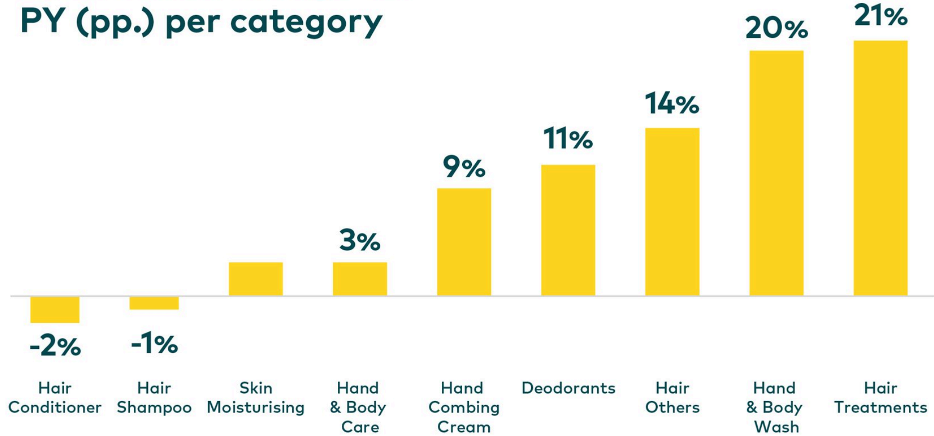
The key to that success has been its ability to leverage its large portfolio of variants to boost overall penetration by 3.2% (the third year in a row it's increased penetration). When we dive down through the variants, we see a concerted effort across the brand range.

Hand and body wash, for example, has grown regional penetration by seven points, deodorants are up five points and hair conditioner has increased by 2.3 points. Shampoo and hair treatments are up as well.

Dove in Latam:



Penetration change vs. PY (pp.) per category



Source: Brand Footprint 2025: 15 markets - Worldpanel by Numerator

67.8%
Regional in MX

+4.0%
Penetration points vs. PY

-1%
Frequency vs. YA

133 m CRPs
+7,0% vs. PY

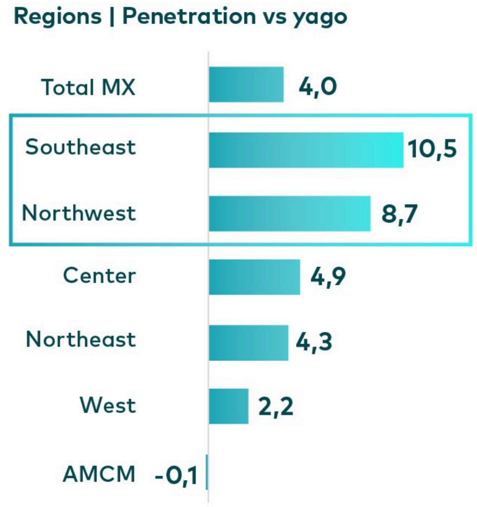
Unusual heatwaves have boosted sales of the bottled water category across Mexico but Epura has been the best performer, reaching 68% of Mexican Households during 2024.

Epura has outperformed its category rivals thanks to two key advantages. First, it's benefited from a smart penetration strategy and is now present in the main channels driving growth in Mexico.

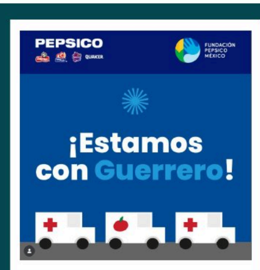
But beyond distribution, its altruistic support for Mexicans who were hit by a natural disaster in the southwest of the country has energized sales.

After Hurricane Otis impacted Guerrero, Fundación Pepsico Mexico offered support to those affected and the gratitude felt by the whole country can be seen in a 4.0% increase in CRPs.

Brand Profile	Main Growth Driver
ABC + & C	DE +6.6pp
50+ years	50+ years +5.2pp
3 - 4 Members	1 - 2 members +5.5pp
Children up to 18 y/o	W/o children +4.9pp



2024 heat waves and water scarcity drove beverages growth and even more for Packaged Water. During this period Epura played on key development channels to develop penetration



Also, solidarity response during Hurricane Otis created a gratitude effect, driving choices for Epura

Worldpanel by Numerator

Takeaways

Decoding brand success

Global players need to maintain their investment in the region if they are to succeed and grow. If a brand doesn't grow in Latam it will have a huge impact on global performance.

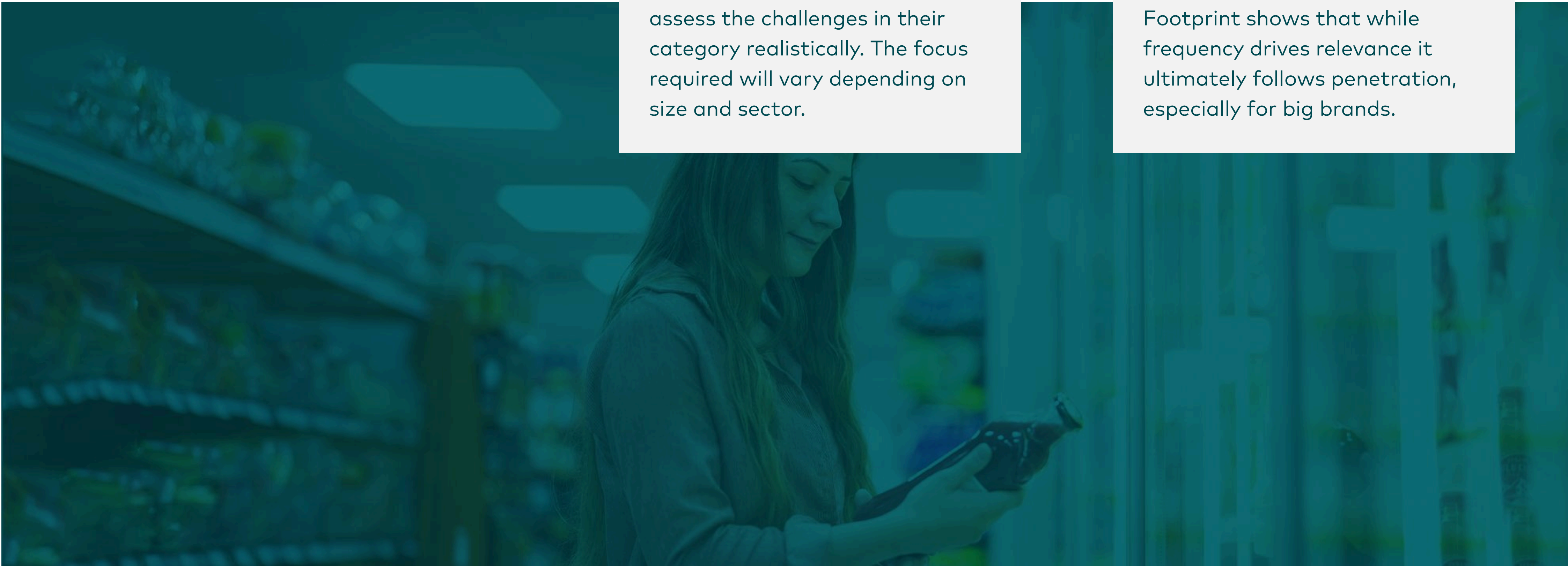
To be one of the winners in Brand Footprint 2026 marketers need to focus on five key areas.

01. Set Realistic Targets.

You don't become Coca-Cola or Bimbo overnight. Brands need to accept their market position and assess the challenges in their category realistically. The focus required will vary depending on size and sector.

02. Penetration comes first.

Before you can be bought you have to be available, physically as well as mentally. Brand Footprint shows that while frequency drives relevance it ultimately follows penetration, especially for big brands.



03.
High-Low Market Polarisation.

Don't let your brand get stuck in the middle when consumers are looking at Private Label or Premium. Understand what is happening to your category through this lens and what consumers are willing to pay for your brand.

04.
The Consumption Occasion can be critical.

Understand how different generations and different moments matter for your brand and your category. The opportunity to own many of these moments remains.

05.
Identify your room to grow and create the time to learn.

For more information, please fill out the form to contact us.

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