

GOOD HEALTH GEEK

2026

LATIN AMERICA WORKFORCE PERFORMANCE BRIEFING

EXECUTIVE EDITION

The Workforce Performance
Conversation Companies
Haven't Had Yet

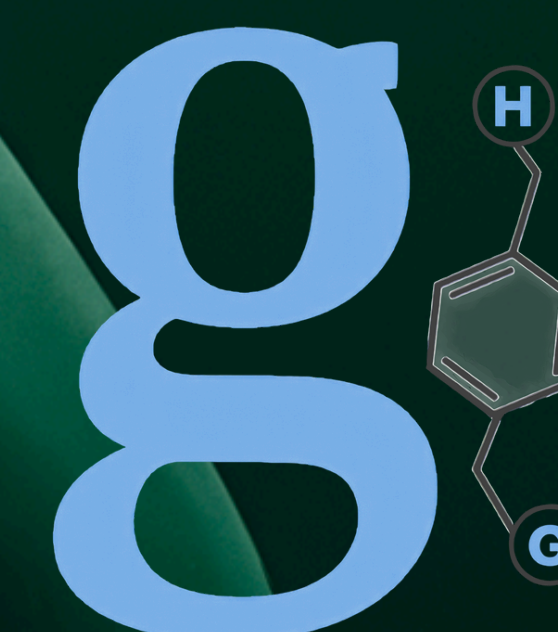
THE ECONOMICS
OF CONSISTENCY

Mood Focus &
Brain Chemistry

THE PERFORMANCE
EQUATION

THE CASE FOR
CHEMISTRY AT WORK™

Exploring the *Human Factors*
Behind Workforce *Performance*



GOOD HEALTH GEEK

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THE WORKFORCE PERFORMANCE CONVERSATION COMPANIES HAVEN'T HAD YET

Exploring workforce support models that address both organizational systems and the people operating within them.

THE NEW WORKFORCE PERFORMANCE LANDSCAPE

Key trends exploring workforce performance and wellbeing.

WORKFORCE WELLBEING IS MORE THAN A BENEFIT

Evolving Benefits and Wellbeing Strategies to Support Changing Workforce Needs.

THE MISSING LAYER – BIOLOGY

Strong Outcomes Are Built on a Strong Foundation.

WORKFORCE PERFORMANCE IS BIOLOGICAL BEFORE IT'S BEHAVIORAL

Every workplace outcome is experienced through a human being.

WHAT LEADING ORGANIZATIONS ARE SEEING

Human performance is becoming a business conversation. Leading organizations are paying attention.

THE FRAMEWORK

A practical architecture for understanding and improving human performance.

MOOD, FOCUS & BRAIN CHEMISTRY

The Messengers Behind Mood, Focus & Performance.

FOOD FOR MOOD™

Every plate sends signals to your brain.

BUILDING THE RAW MATERIALS OF PERFORMANCE

The body and brain cannot create something from nothing.

WHEN FOOD ALONE ISN'T ENOUGH

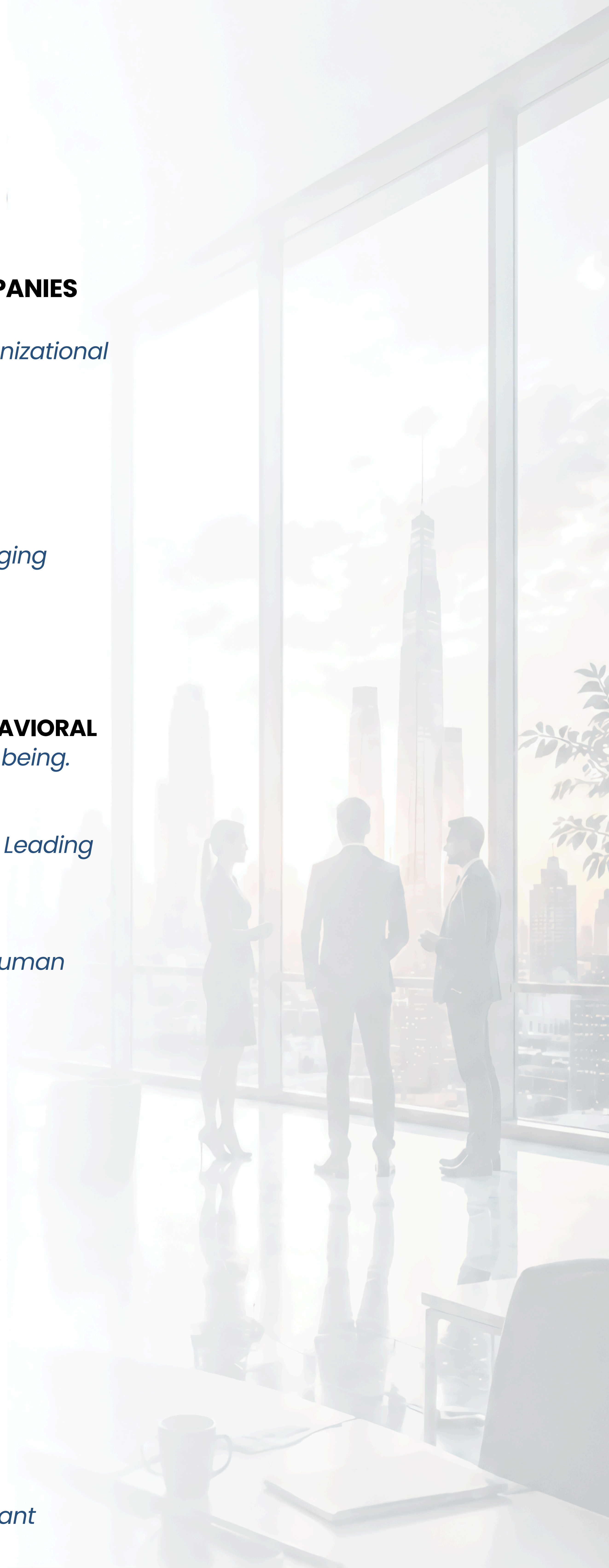
Food remains the ideal foundation for good health.

THE PERFORMANCE EQUATION

Performance is never the result of one thing.

THE ECONOMICS OF CONSISTENCY

Small improvements across a workforce can create significant financial impact.



The Workforce Performance Conversation Companies Haven't Had Yet

Latin America has made meaningful gains in employment, yet organizations across the region continue to operate within a persistent productivity challenge.

Traditional performance strategies have focused largely on technology, skills, management, and operational efficiency. These factors matter, but they do not tell the whole story.

Every workforce is made up of human systems. Energy, cognitive function, stress response, recovery, and consistency are influenced by the biological conditions employees bring to work each day.

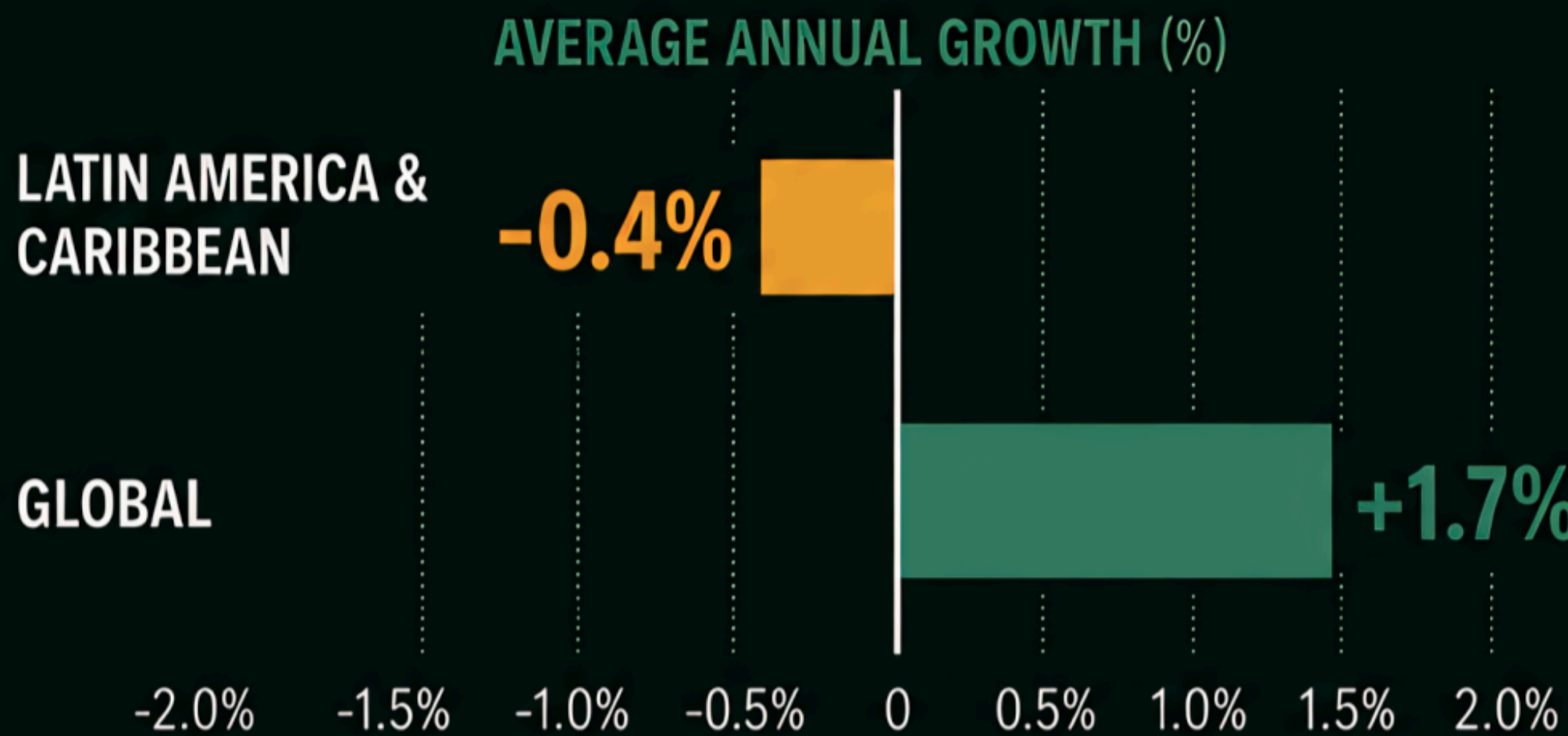
Biology may be one of the most overlooked parts of the performance equation.

THE LATIN AMERICAN WORKFORCE PERFORMANCE LANDSCAPE

Evidence from regional and international research

LABOR PRODUCTIVITY: A DECADE OF DIVERGENCE

Average annual labor productivity growth, 2015–2025



While global labor productivity advanced, productivity across Latin America and the Caribbean declined on average over the decade.

Source: ILO, 2026.



>77.9%

MENTAL HEALTH TREATMENT GAP

More than three in four people with mental disorders in Latin America and the Caribbean do not receive care.

Source: PAHO/WHO.
(Latin America & the Caribbean)



35.6%

INSUFFICIENT PHYSICAL ACTIVITY

More than one in three adults in the Region of the Americas did not meet recommended physical activity levels in 2022.

Source: PAHO/WHO, 2024.
(2022 estimates, Region of the Americas)



Productivity is an economic measure. Performance begins with the people behind it.

Biology may be one of the most overlooked parts of the performance equation.

The New Workforce Performance Landscape

KEY TRENDS SHAPING
WORKPLACE PERFORMANCE
AND WELLBEING



\$7.3T

HEALTH & ECONOMIC IMPACT

Noncommunicable diseases and mental health conditions are projected to cost South America more than \$7.3 trillion in lost productivity and healthcare spending between 2020 and 2050.

Source: PAHO, 2025.
(South America)



>50%

NUTRIENT INADEQUACY

Inadequate intake exceeded 50% for most shortfall nutrients studied across eight Latin American countries.

Source: ELANS Study, 2021.
Dietary data collected 2014–2015;
8 Latin American countries

Health challenges and widespread nutritional gaps reveal an important dimension of the region's workforce performance landscape.

Understanding the human factors behind performance creates another lens for strengthening workforce wellbeing and resilience.



1

PRODUCTIVITY REMAINS A REGIONAL CHALLENGE

Labor productivity in Latin America and the Caribbean declined by an average 0.4% annually between 2015 and 2025, compared with 1.7% average annual growth globally.

Source: ILO, 2026



2

HEALTH HAS ECONOMIC CONSEQUENCES

NCDs and mental health conditions are projected to impose trillions of dollars in economic losses across South America through healthcare costs and effects on workforce participation and productivity.

Source: PAHO/WHO, 2025



3

NUTRITIONAL ADEQUACY CANNOT BE ASSUMED

Across eight Latin American countries, inadequate intake exceeded 50% for most of the shortfall nutrients evaluated, revealing substantial gaps even within contemporary food environments.

Source: ELANS



4

PERFORMANCE HAS A BIOLOGICAL DIMENSION

Nutrition, sleep, physical activity and other modifiable health behaviors influence biological systems involved in energy metabolism, cognition, stress response, recovery and physical capacity.

Sources: Gómez-Pinilla, Nature Reviews Neuroscience; Deuster & Silverman, Philosophical Transactions of the Royal Society B; Hirotsu et al., Sleep Science.

“The future of workforce performance will be shaped by how well organizations understand and support the human system at work.”



Workforce Wellbeing Is More Than a Benefit.

Across Latin America, employers are evolving their benefits and wellbeing strategies to better support changing workforce needs.

Yet the conditions that influence workforce health and performance extend beyond traditional wellness programs, particularly in industrial and operational environments where physical, environmental, and psychosocial demands can intersect.



PHYSICAL DEMANDS

STRENGTH • ENDURANCE • REPETITION

Lifting, repetitive movement, prolonged exertion, and physically demanding tasks can place substantial demands on the human system.



ENVIRONMENTAL FACTORS

HEAT • ALTITUDE • NOISE • EXPOSURE

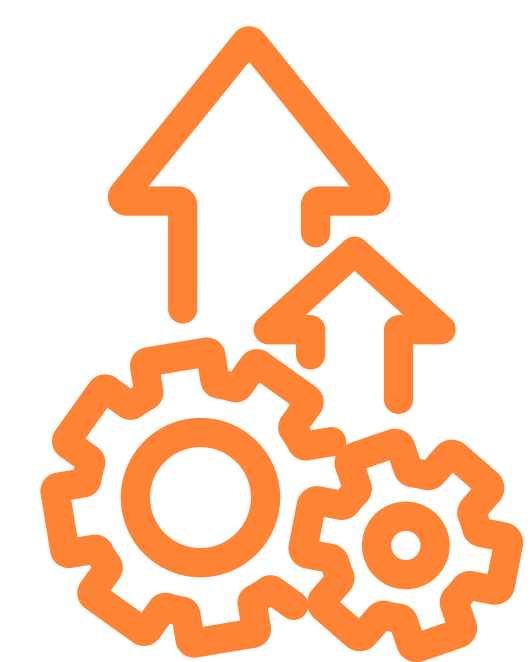
Working conditions can introduce environmental demands that affect comfort, endurance, recovery, and the ability to perform consistently.



PSYCHOSOCIAL PRESSURE

WORKLOAD • STRESS • WORKING TIME

Workload, schedules, job demands, and psychosocial conditions can influence worker health, wellbeing, and performance.



HUMAN PERFORMANCE

ALERTNESS • ENERGY • RECOVERY

The ability to remain focused, alert, physically capable, and responsive can matter not only to productivity, but to safe and consistent performance.

Sources: ILO, Occupational Safety and Health in Latin America and the Caribbean; ILO, Psychosocial Working Environment.

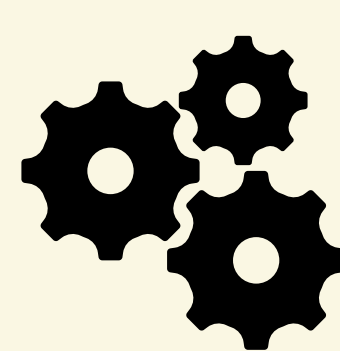


The Missing Layer BIOLOGY

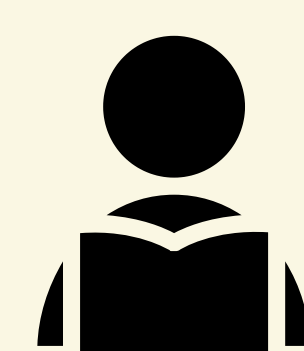
Most workforce initiatives appropriately focus on the environment around the employee:



SAFETY



EQUIPMENT



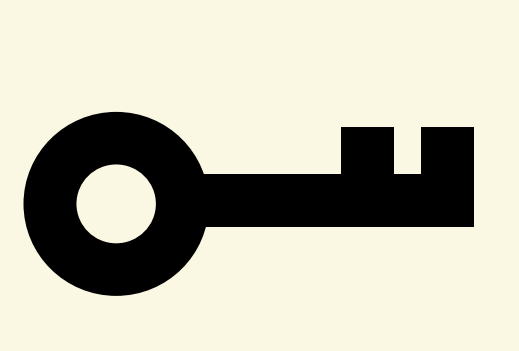
TRAINING



BENEFITS



BEHAVIOR



ACCESS

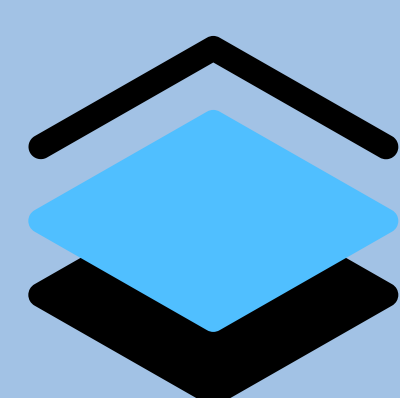
These approaches matter.

But every employee also brings a biological system to work. Nutrition, sleep, hydration, metabolic health, stress response, and recovery can influence the energy, cognition, physical capacity, and resilience available throughout the workday.

Human Performance Has a Biological Foundation

Traditional safety programs address the work environment, equipment, procedures, and training.

Workforce wellbeing programs address health, access, and behavior.



Another layer deserves attention:

the biological conditions that influence how employees feel and function throughout the workday.

For physically demanding and operational workforces, this can be particularly relevant. Focus, alertness, energy, recovery, and physical capacity contribute to the consistency with which employees perform demanding tasks.



Workforce Performance

Is **Biological** Before It's Behavioral

Every workplace outcome is experienced through a human being.

Focus, energy, resilience, consistency, and stress tolerance are often discussed as behavioral issues. Yet these experiences are also influenced by biological factors that affect how employees think, feel, adapt, and perform throughout the day.

FOCUS

ATTENTION – AWARENESS – DECISION-MAKING

The ability to concentrate, maintain attention, process information, and respond appropriately is influenced by sleep, nutrition, recovery, stress burden, and overall wellbeing.

Across office, industrial, and operational environments, employees arrive each day with varying capacities for sustained attention and cognitive performance.



RESEARCH INSIGHT

Sleep quality, adequate recovery, good nutrition are associated with improved attention, reaction time, and sleep.

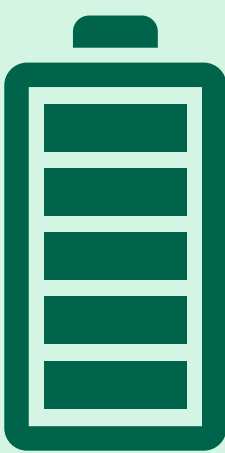
Source: PAHO/WHO, ILO

ENERGY

ENDURANCE • ALERTNESS • CAPACITY

Supports both cognitive and physical performance.

Refrain from energy can affect alertness, processing speed, motivation, endurance, and the capacity to perform demanding tasks consistently throughout the day.



RESEARCH INSIGHT

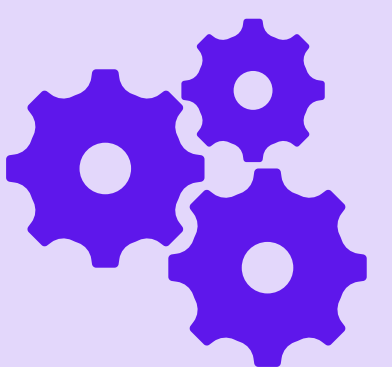
Fatigue is a leading contributor to reduced productivity and health are associated with greater variability in daily performance.

Source: PAHO/WHO, ILO

CONSISTENCY

STABLE PERFORMANCE OVER TIME

Organizations do not simply depend on whether employees can perform. They depend on the ability to perform consistently across days, which is why consistency can be influenced by factors occurring long before the workday begins.



RESEARCH INSIGHT

Irregular sleep and poor health are associated with greater variability in daily performance.

Source: PAHO/WHO, ILO



RESILIENCE

RECOVERY • ADAPTATION • CAPACITY

Resilience is the capacity to recover, adapt, and continue functioning under pressure. It is influenced not only by mindset, but also by sleep, recovery, nutrition, stress burden, physical health, and the demands of the working environment.



RESEARCH INSIGHT

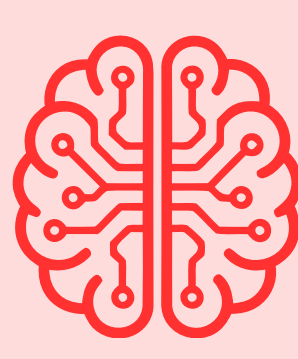
Workers who report better recovery and overall wellbeing show greater adaptability and sustained performance under pressure.

Source: ILO, PAHO/WHO

STRESS

RESORSE – REGULATION – RECOVERY

Stress affects nearly every aspect of workplace performance. Decision-making, communication, attention, emotional regulation, and physical health can all be influenced by stress burden.



RESEARCH INSIGHT

Chronic stress is linked to burnout, reduced motivation, emotional regulation, physical burnout, and workplace incidents.

SOURCE: WHO, ILO

Chemistry at Work Insight

Workforce performance is not experienced as a policy, program, or initiative.

It is experienced through the biological systems employees bring to work daily.



Organizations appropriately focus on how people work.

Chemistry at Work™ explores biological factors that may influence how people are able to perform that work.

What Leading Organizations Are Seeing

Human performance is becoming a business conversation.
Leading organizations are paying attention.

For decades, organizations focused on improving performance.
Few asked what influences performance in the first place.

BHP's Chilean operations publicly recognized mental health and psychosocial risk as emerging workforce challenges, implementing programs designed to better understand and support employee wellbeing. The company acknowledged that workforce performance can be influenced by factors extending beyond traditional safety and productivity measures.

These organizations are not alone. As workforce costs continue to rise and productivity remains under pressure, leaders across Latin America are asking a broader question:

What factors influence how employees show up each day?

Historically, performance conversations focused on leadership, training, culture, and engagement.

Today, a growing number of organizations are expanding that conversation to include human performance factors such as energy, recovery, resilience, stress load, and overall wellbeing.

The shift is subtle but important.

The conversation is no longer simply about improving performance.

It is increasingly about understanding the factors that influence performance in the first place.

That shift is creating space for a broader perspective.

Natura, one of Latin America's largest multinational companies, has incorporated employee experience, wellbeing, purpose, stress, and engagement into its workforce strategy. With a reported 91% employee engagement score and 92% participation in its workforce survey, the company continues to measure these factors as indicators of organizational health and performance.

Organizations throughout the region are increasingly recognizing that burnout, stress, resilience, recovery, and employee wellbeing can influence outcomes leaders care deeply about:

productivity, engagement, absenteeism, retention, healthcare costs, and organizational performance.

“

Most companies do not struggle with employee capability.

They struggle with consistency.



A Consistency Problem?

40%

of workers globally report feeling stressed during much of the workday.

Source: Gallup State of the Global Workplace 2024

Stress → Consistency → Performance

What Leading Organizations Are Seeing

- Burnout affects productivity.
- Recovery affects consistency.
- Engagement affects performance.
- Wellbeing affects business outcomes.



The question is no longer whether these factors matter; it's how organizations respond.

THE FRAMEWORK

A practical architecture for understanding and improving human performance.

The **Chemistry at Work™** Framework brings together four essential elements, built on a foundation of trust and confidentiality, that influence how people think, feel, and perform every day.

01 CONFIDENTIAL & PRIVATE

Employee information remains private and is never shared with employers.

02 EDUCATION

Understanding nutrition, supplementation, and the factors that influence focus, energy, mood, and resilience.

03 SCREENING & INSIGHT

Private screening helps employees discover nutritional gaps, sensitivities, and other factors that may influence how they feel and perform.

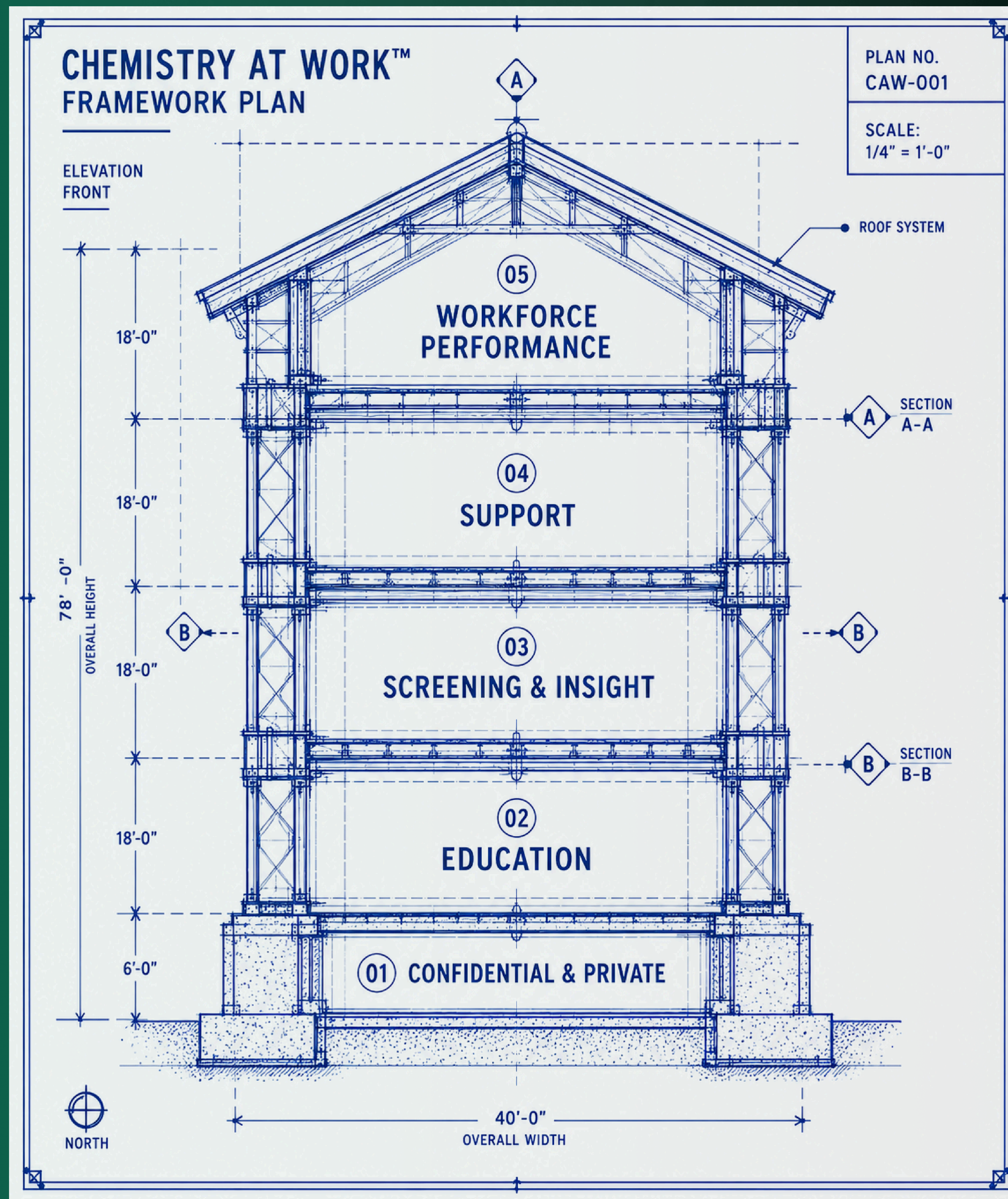
04 SUPPORT

Registered dietitians can help employees translate insight into practical action through nutrition, food choices, and supplementation.

05 WORKFORCE PERFORMANCE

The result of building a strong foundation and providing the right support, empowering employees to perform at their best every day.

- + FOCUS
- + ENERGY
- + RESILIENCE
- + CONSISTENCY
- + WELLBEING



TOGETHER, THESE FIVE ELEMENTS HELP EMPLOYEES BETTER UNDERSTAND
AND IMPROVE THE FACTORS THAT INFLUENCE DAILY PERFORMANCE.

Mood Focus & Brain Chemistry

THE MESSENGERS BEHIND MOOD, FOCUS & PERFORMANCE

Behind every decision, conversation, and solution is a network of chemical messengers constantly shaping how we think, learn, adapt, and respond.

These chemical messengers influence how we think, feel, communicate, solve problems, and perform throughout the workday.

NEUROTRANSMITTERS ARE CHEMICAL MESSENGERS THAT HELP REGULATE MOOD, MOTIVATION, FOCUS, LEARNING, AND STRESS RESPONSE.

They do not work alone. They interact within complex biological systems influenced by lifestyle, environment, and daily habits.

Neurotransmitters constantly communicate with one another. Changes in sleep, nutrition, stress load, recovery, physical activity, and overall health can influence how these systems function.

FIVE NEUROTRANSMITTERS FREQUENTLY ASSOCIATED WITH WORKPLACE PERFORMANCE

DOPAMINE

Motivation, drive, reward and goal pursuit

SEROTONIN

Mood, stability, wellbeing and confidence

GABA

Calm, relaxation, and stress regulation

ACETYLCHOLINE

Learning, memory, attention and clarity

NOREPINEPHRINE

Alertness, focus, energy and response

Brain chemistry does not operate in isolation.

Neurotransmitter systems are influenced by more than the brain alone.

FOOD FOR MOOD

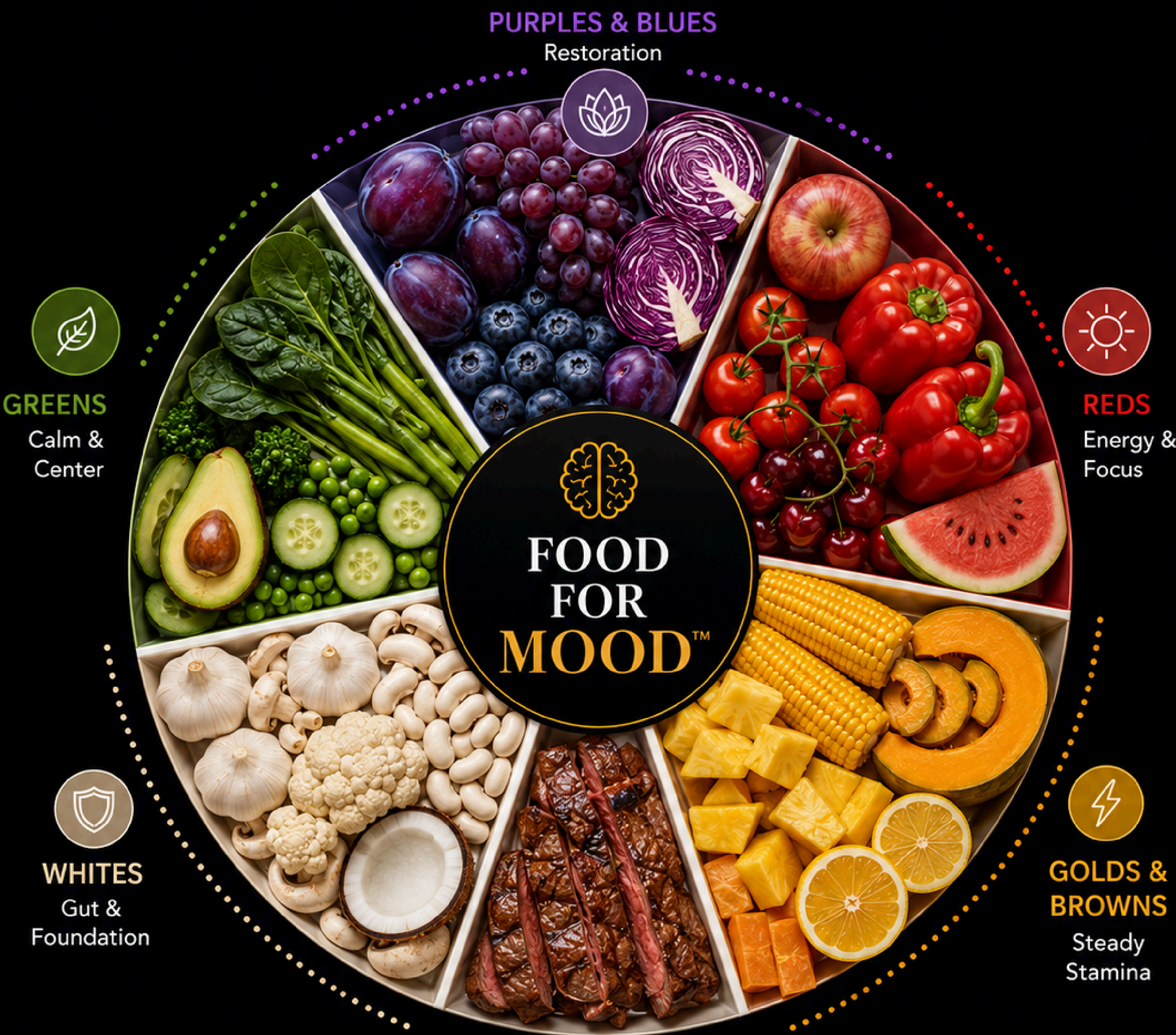
Every plate sends signals to your brain.

Color, protein, and carbohydrates work together to shape energy, focus, calm, and recovery without strict diets, apps, or perfection.

Choose your protein for pace (lean for quick, creamy for slow), your carbs for timing (fast vs. steady), and the color that matches how you want to feel. The sections below walk through each piece, plus the research behind it.



PROTEIN SETS THE PACE
COLOR SETS THE DIRECTION
CARBS SET THE TIMING



FAST & SLOW PROTEINS

FAST PROTEINS
Chicken
Lean cuts

SLOW PROTEINS
Beef
Higher fat cuts

REDS
Energy & Focus

GREENS
Calm & Center

GOLDS & BROWNS
Steady Stamina

PURPLES & BLUES
Restoration

WHITES
Gut & Foundation

Nutrition influences more than physical health. Food for Mood™ is a practical framework for understanding how everyday meals may affect mood, focus, and wellbeing.

Adapted from Food, Brain, and Performance: The Science Behind Food for Mood (SSRN Preprint) and supporting peer-reviewed research referenced therein.

QUICK CARBS
Fast fuel

- ✓ Fruit
- ✓ Honey
- ✓ Simple starches

SLOW CARBS
Long, steady energy

- ✓ Beans
- ✓ Oats
- ✓ Whole grains

BUILDING THE RAW MATERIALS OF PERFORMANCE

The body and brain cannot create something from nothing.

Every day, the body relies on vitamins, minerals, amino acids, healthy fats, and other nutrients to support energy production, recovery, stress regulation, attention, learning, and countless biological processes.

These systems operate continuously, helping employees think, communicate, solve problems, and adapt to daily demands.

When nutritional needs are met, the body is generally better positioned to support consistent performance.

When nutritional gaps exist, the effects may not always be obvious, but they can influence how people feel, function, and recover over time.



FOOD FIRST

Whole foods remain the foundation of good nutrition.

Protein, fruits, vegetables, healthy fats, legumes, nuts, seeds, and minimally processed foods provide the nutrients the body depends on every day. Healthy meals help supply the raw materials needed to support the systems associated with energy, mood, focus, recovery, and overall wellbeing.

**OVER
50%**

More than 50% of adults studied across eight Latin American countries had inadequate intake of most key nutrients evaluated were vitamin D deficient based on blood levels in South America.

Source: ELANS & Nutrition Reviews, Systematic Review of 227,758 participants. study across eight Latin American countries.

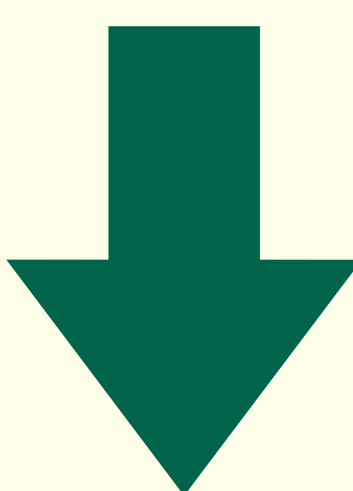




WHEN FOOD ALONE ISN'T ENOUGH

Food remains the ideal foundation for good health.

However, modern food production, processing, storage, lifestyle demands, medications, digestive challenges, dietary restrictions, and individual biological differences can all influence nutritional status.



For some individuals, food alone may not consistently provide everything needed to achieve nutritional adequacy. In these situations, targeted supplementation may help fill nutritional gaps and support overall health.



THE GOAL IS SIMPLE
Not to **replace** healthy meals.
To **support** them.

“Supplementation works best when it complements a healthy diet, not when it replaces one.”

NUTRIENTS FREQUENTLY DISCUSSED

Nutrient needs vary from person to person. Some of the nutrients most commonly identified as areas of concern include:



Vitamin D



Magnesium



Omega-3



B Vitamins



Iron



Zinc



Calcium



Potassium



Protein

BACKED BY SCIENCE

Research continues to support the role of nutrition in health and performance.

INDIVIDUAL NEEDS MATTER

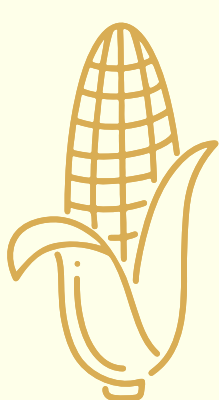
Nutritional needs vary based on biology, lifestyle, and life stage.

PERSONALIZED APPROACH

Private screening can help identify potential nutritional gaps.

SUPPORT FOR REAL LIFE

Registered dietitians can help interpret results and provide guidance.



Food is the foundation. Quality supplementation may help fill nutritional gaps and support overall health and wellbeing.

The Performance Equation

PERFORMANCE HAPPENS WHERE THEY INTERSECT

Performance =

Capability + Environment + Human Factors

PERFORMANCE IS NEVER THE RESULT OF ONE THING.

It emerges from the intersection of capability, environment, and human factors.

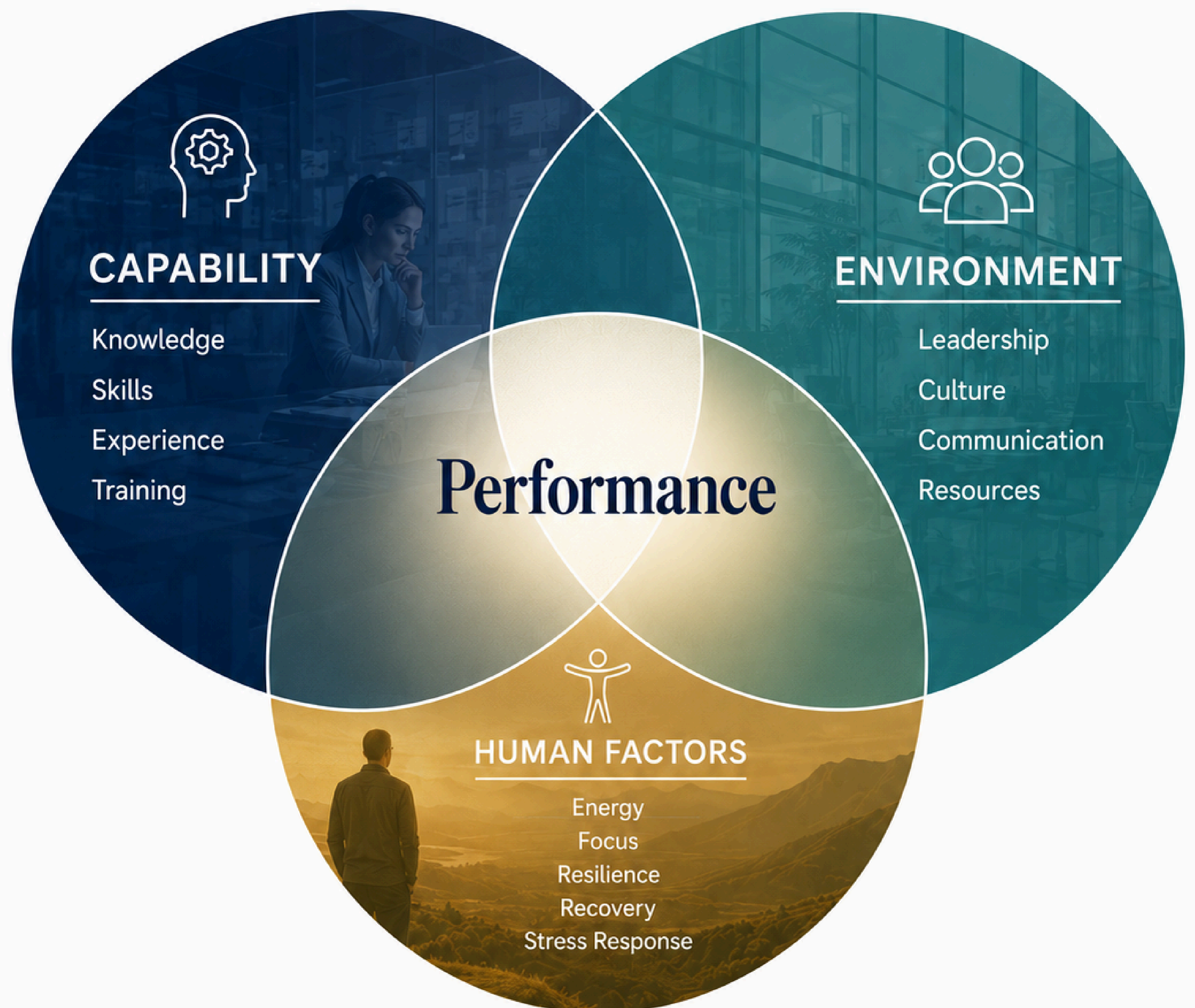
Most organizations invest heavily in building capability and shaping the environment.

Human factors are often the least understood and least managed component.

Yet they influence how employees think, communicate, solve problems, and perform every single day.

When these factors are supported, performance compounds.

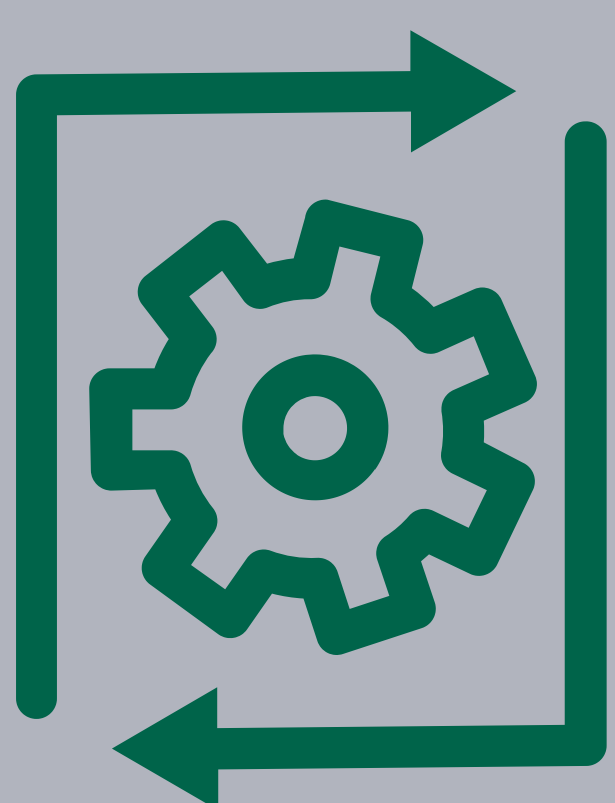
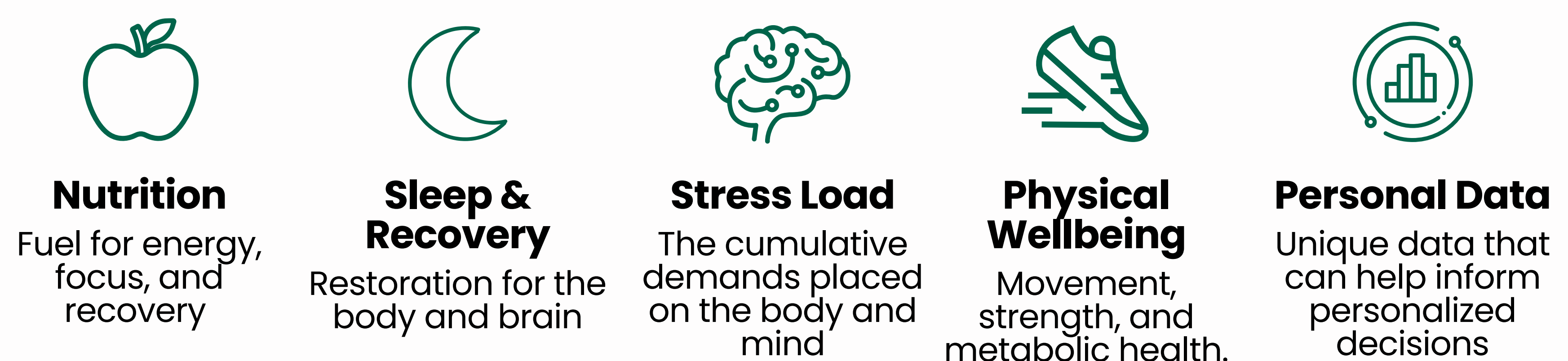
When they are overlooked, even the best strategies struggle to deliver.



“Performance is shaped long before the workday begins.”

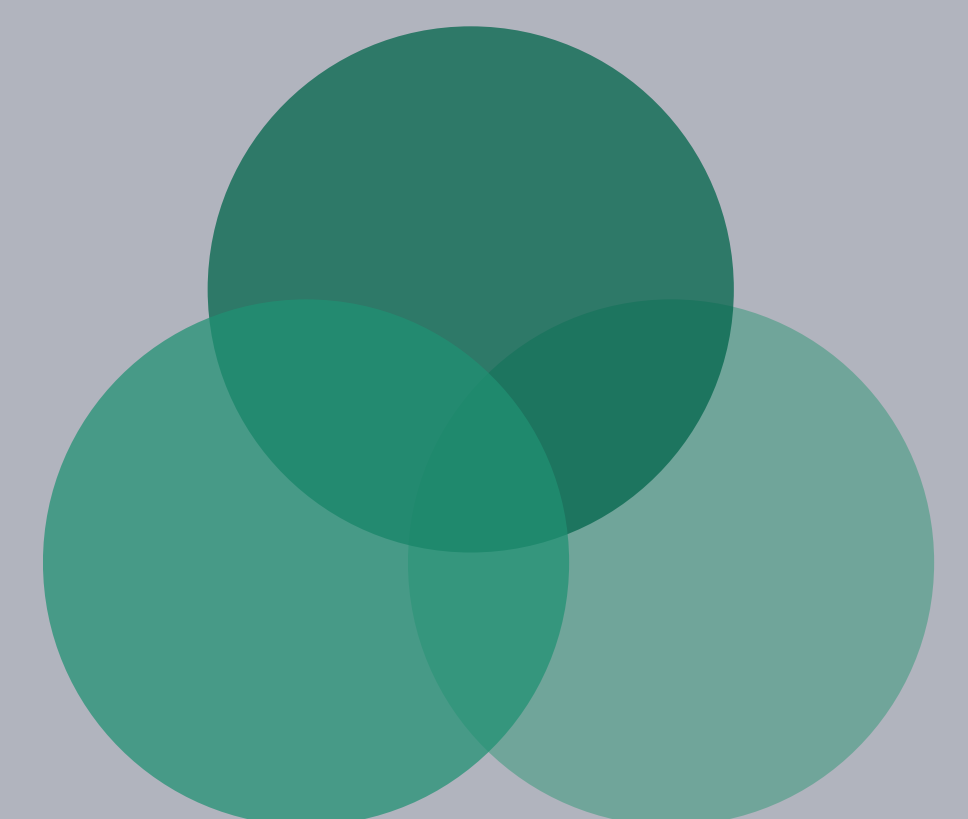
Human factors influence how employees think, feel, and perform.

The Foundations That Shape Human Factors



THE CHEMISTRY AT WORK™ FRAMEWORK

The Chemistry at Work™ Framework is designed to help organizations better understand the factors that influence workforce performance and create new opportunities for improving outcomes.



The Economics of Consistency

SMALL IMPROVEMENTS ACROSS A WORKFORCE CAN CREATE SIGNIFICANT FINANCIAL IMPACT.

Most organizations already understand the costs of turnover, absenteeism, burnout, and disengagement.

What is often overlooked is the cumulative cost of everyday inconsistency.



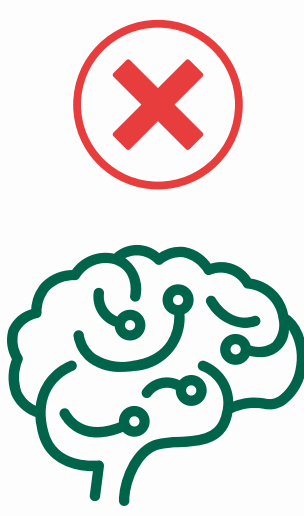
Reduced Focus



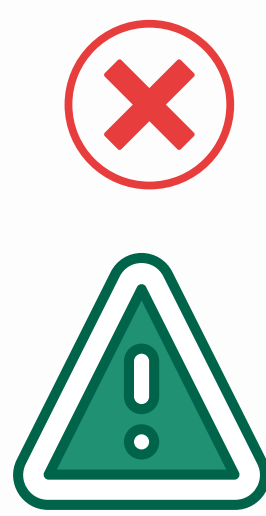
Lower Energy



Slower Recovery



Increased Stress



Inconsistent Performance

Small changes experienced by individual employees can influence productivity, engagement, retention, and organizational performance over time.

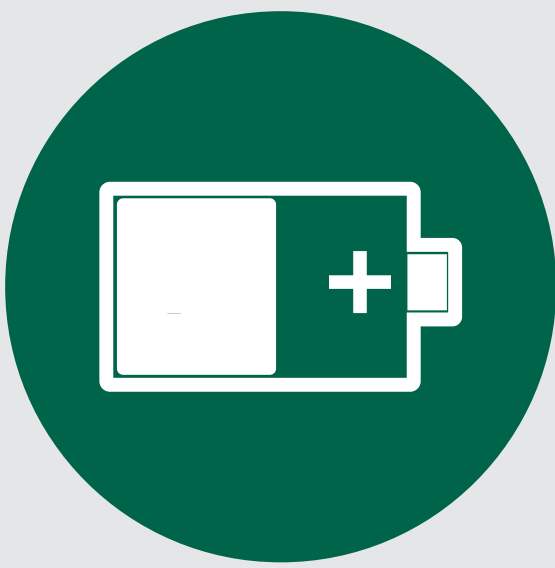
WHAT THE RESEARCH SUGGESTS



STRESS MATTERS

41%

of workers in Latin America and the Caribbean report experiencing stress during the workday.



BURNOUT MATTERS

Burnout has been associated with lower productivity, higher turnover intention, and increased healthcare utilization.



PRESENTEEISM MATTERS

The cost of reduced performance while present at work often exceeds the cost of absenteeism.

THE PAYROLL LEVERAGE

Every organization already invests in workforce performance.

For a workforce of 1,000 employees earning an average salary of \$60,000, annual payroll represents approximately:

\$60 Million

ESTIMATED PERFORMANCE REDUCTION

2%	—————>	\$1.2 Million
5%	—————>	\$3.0 Million
10%	—————>	\$6.0 Million

*Illustrative model based on 1,000 employees with an average salary of \$60,000. Uses conservative performance reduction assumptions.

MODELED ANNUAL CAPACITY LOSS*

THE LEVERAGE IN ACTION

Annual Payroll

1% Improvement

= \$600K Potential Value

2% Improvement

~ \$1.2M Potential Value

5% Improvement

= \$3.0M Potential Value

Illustrative Investment Example

In a workforce of 1,000 employees: \$200 per employee annually = \$200,000 annual program investment.

For many employers, the financial impact of improved workforce consistency may be measured in hundreds of thousands or even millions of dollars over time.



CONSISTENCY MULTIPLIER

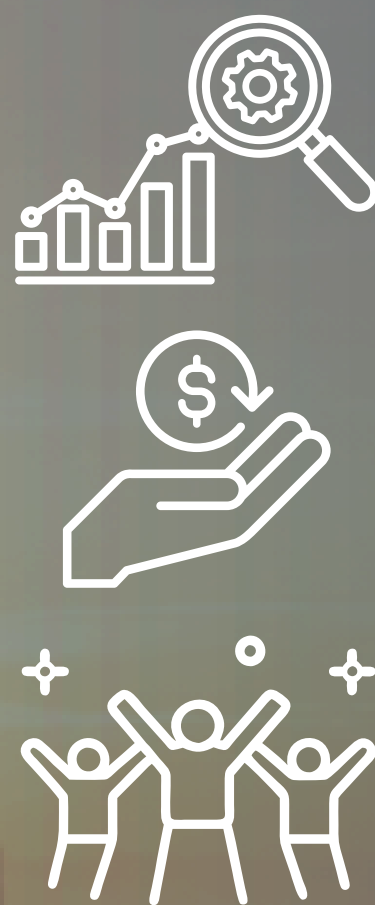


Small improvements today. Large impact tomorrow.



“

Small improvements in workforce consistency can create significant organizational value.



Focus on what influences performance.

Invest in what drives consistency.

Realize the value of a healthier, more engaged, and productive workforce.

THE CASE FOR CHEMISTRY AT WORK™

THE CHEMISTRY AT WORK EXPERIENCE

A workforce performance system designed to help organizations better understand the human factors behind consistency, engagement, and results.



EDUCATION

Science-based education to build awareness and understanding.



SCREENING

Private screening options that identify potential nutritional gaps.



GUIDANCE

Professional dietitian guidance tailored to each individual.



ACTION

Practical, everyday strategies employees can put into action.



CONSISTENCY

Stronger daily habits lead to improved performance and organizational value.



FOUNDATION EXPERIENCE

A clean, complete starting point.

FOR EMPLOYEES

- 1-hour discovery video
- Printed companion guide
- Annual private lab screening
- Access to our network of dietitians

FOR HR / PROGRAM DELIVERY

- 3 Workday Rhythm Checks (served at 4-month intervals)
- HR Rollout Kit (with pre-written templates)
- 4 - 24" x 36" Promo Posters



MOMENTUM EXPERIENCE

Adds a mid-year reinforcement layer.

FOR EMPLOYEES

- Twice-yearly lab screening
- One mid-year Boost Video

FOR HR / PROGRAM DELIVERY

- 4 quarterly engagement articles
- 3 Workday Rhythm Checks
- HR Rollout Kit (with pre-written templates)
- 4 - 24" x 36" Promo Posters
- 1 - 33.5" x 78.7" Retractable Banner



SUSTAINED EXPERIENCE

Built-in year-round engagement.

FOR EMPLOYEES

- Twice-yearly lab screening
- Three quarterly Boost Videos

FOR HR / PROGRAM DELIVERY

- 12 engagement articles
- 3 Workday Rhythm Checks
- HR Rollout Kit (with pre-written templates)
- 4 - 24" x 36" Promo Posters
- 2 - 33.5" x 78.7" Retractable Banners



DELIVERY PARTNERS

Chemistry at Work™ works with trusted third-party providers to deliver private screening and professional nutrition guidance.

Cell Science Systems Testing Services

Vitamin & Mineral Imbalance Test (Cellular Micronutrient Assay)

NutriGreene™ Professional Guidance

Comprehensive Health Screenings (Private blood testing through Quest Diagnostics)



All screening results remain confidential and are provided directly to the employee.

LET'S START THE CONVERSATION.
GOOD HEALTH. STRONGER PERFORMANCE. BETTER OUTCOMES.

CONTINUE THE CONVERSATION

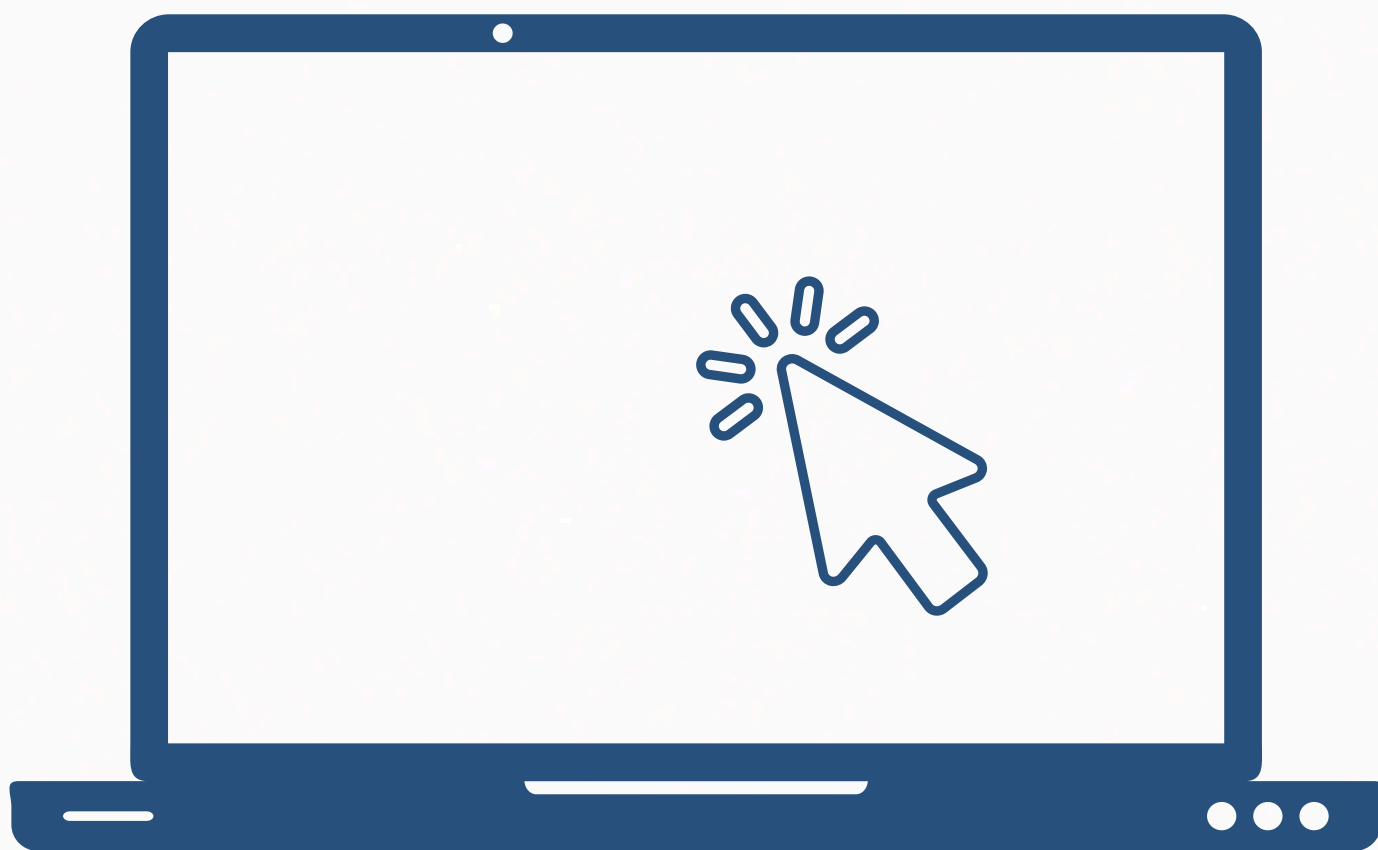
This briefing highlights a growing body of research exploring the relationship between nutrition, brain chemistry, human performance, and workforce outcomes.

Explore additional resources, access references, and stay informed about future executive briefings and educational events.



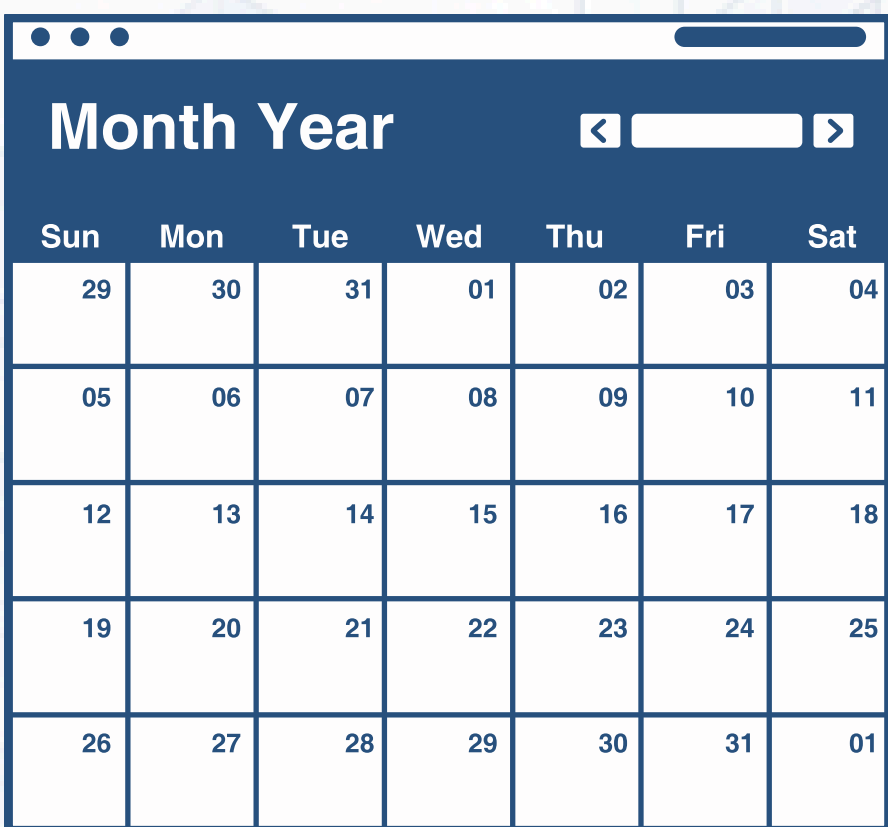
RESEARCH & REFERENCES

Access the studies, data, and sources referenced throughout this briefing. Citations and additional research are available online.



WORKFORCE RESOURCES

Download articles, guides, and practical resources designed to help organizations better understand the human factors that influence performance.



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