

Brazil 3PL - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2020 - 2029

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Report description:

The Brazil 3PL Market size is estimated at USD 33.20 billion in 2024, and is expected to reach USD 40.90 billion by 2029, growing at a CAGR of 4.26% during the forecast period (2024-2029).

The pandemic affected the logistics sector in the beginning, but later, after easing restrictions increased in the e-commerce sector, further boosting the third-party logistics network in the country.

Brazil has the largest logistics market in Latin America and has complex customs procedures for products going both ways, for exports and imports, thus driving the outsourcing of customs clearance to the 3PL provider. Being one of the largest countries (in terms of geography and population), Brazil is an important market for consumer-packaged-goods (CPG) companies.

Moreover, to meet the growing demand for outsourcing logistics, the country is highly invested in expanding its logistics and social infrastructures, as the country's logistics matrix is highly dependent on highways. In addition, the country's logistics sector is also focusing on decarbonization goals by adopting energy efficiency initiatives in its supply chain to reduce carbon emissions and achieve net zero emission goals set by the country.

Brazil 3PL Market Trends

Increasing Freight Trucking Driving the Market Growth

In 2023, Brazil has more than 4.2 million truck drivers and nearly 2 million kilometers of roads. In addition, the country has one of the world's largest road logistics networks, and the flow of trucks is witnessing significant growth. Also, according to the Brazilian

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Association of Highway Concessionaires (ABCR), in the past two decades, the truck traffic in the country increased by more than 60%, and most of the goods in the country are traded via highways.

Moreover, Brazil has a network of more than 1.7 million km of federal roads, the fourth-largest system in the world after the United States, China, and India, and it relies on its highways and backroads for the transportation of 90% of its ton-mile cargo nationally, using rail for less than a tenth. Hence, trucking haulage plays a vital role in the growth of the 3PL market in the country.

Meanwhile, Brazil's trucking sector is moving towards energy efficiency to reduce carbon emissions and improve air quality by taking initiatives such as replacing older trucks, improving fuel economy, and investing in rail and roads. Moreover, in 2022, heavy trucks accounted for more than half of all new trucks registered in Brazil, with more than 65 thousand units, followed by semi-light trucks, medium trucks, etc. Thus, the increasing trucking freight further drives the third-party logistics market in the country.

E-Commerce Growth Fueling the Logistics Sector

Brazil is the largest and most populated country in Latin America and is continuously experiencing rapid growth in e-commerce expansion in the country, with a more than 16% year-on-year growth rate in 2021. In addition, as per industry experts, the Brazilian e-commerce market is expected to grow by more than 90% by 2025. In addition, Brazilians embrace special promotions and offers provided by e-commerce platforms, thus creating new opportunities for online stores to explore new initiatives to attract customers' attention.

Moreover, the pandemic has driven the bolstering growth in online purchases. The Brazilian government issued pandemic relief via digital wallets, further resulting in increasing e-commerce sales in the country. In addition, despite the functioning of brick-and-mortar stores after the pandemic in the country, the notable population in Brazil preferred online retail channels in 2022. For instance, in 2022, the number of online shoppers' number reached nearly 108 million, up by more than 24% when compared to 2021 (with 87 million online shoppers).

Meanwhile, online sales accounted for more than 10% of all retail sales in Brazil; this is twice as much as the nearly five percent share observed three years earlier in 2018. The pandemic accelerated the e-commerce sector further requires a huge network of third-party logistics to meet the growing consumer demand from online channels.

Brazil 3PL Industry Overview

The 3PL market is fragmented by a large number of players, including CH Robinson, Penske Logistics, DB Schenker, DHL Supply Chain, and Solistica. In Brazil, small and local vendors compete with international players based on cost, as it is difficult for them to compete on quality and range of offerings. The players in the market are focused on investing and developing technologies to increase their operational efficiencies.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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