

Brazil Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Brazil Freight and Logistics Market size is estimated at USD 104.79 billion in 2024, and is expected to reach USD 129.34 billion by 2029, growing at a CAGR of 4.30% during the forecast period (2024-2029).

Growing competition supported by rising government investments of around USD 205 billion per year till 2025

- Investments in infrastructure in Brazil reached a decade-low in 2020, amounting to BRL 123 billion (USD 23.64 billion). Previously, the lowest figure of the period was reported in 2017, following three years of crisis both in the country's construction sector and its economy in general. Since then, and before the COVID-19 pandemic, the sector has shown the first signs of recovery, with investments adding up to around BRL 130 billion per year (USD 25 billion).
- The Brazilian government is likely to spend approximately BRL 205 billion (USD 36.30 billion) per year during 2020-2025 on infrastructure development in the country. The government signed contracts with the private sector worth BRL 100 billion (USD 17.71 billion) for road construction projects over four years.
- There were approximately 225,360 companies legally registered in the Brazilian transportation and logistics sector to transport liquid and solid goods in 2019. The number of companies registered in that sector in Brazil has fluctuated since 2013, when it peaked at around 235,750 registered companies.

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In 2022, Brazil secures USD 47.27 billion in logistics investment and expands privatization efforts to bridge infrastructure gap

- The Brazilian transportation industry includes cargo, passenger rail, logistical infrastructure, highways, ports, public transportation, urban mobility, and intelligent transportation systems. Since trucks are the primary means of moving cargo, logistics are more expensive in Brazil. Around 12% of the country's GDP (4% higher than in the United States) goes toward logistics costs, which is inefficient due to a lack of adequate transportation infrastructure.
- In 2022, the Brazilian government (GoB) pursued an extensive privatization effort through a pipeline of concession auctions and regulatory reforms aimed at attracting financing to help narrow Latin America's most significant infrastructure funding gap. The federal government expected to have secured nearly BRL 250 billion (USD 47.27 billion) in logistics investment by the end of 2022. Furthermore, the rapid growth in occupancy rates of available logistics warehouses, primarily due to an increase in online shopping during the worst of the pandemic, continued in 2021, and the high demand for purchasing goods from the online market in 2022.
- In 2021, The Government of Brazil (GoB) pursued a large privatization effort through a pipeline of concession auctions and regulatory reforms aimed at attracting financing to help narrow the largest infrastructure funding gap in Latin America. Furthermore, the Ministry of Infrastructure (MInfra) activities included virtual roadshows for foreign audiences to showcase concession opportunities in railways, airports, highways, and ports. In 2022, the government invested BRL 5.28 billion (USD 998.39 million) in three blocks: Rio de Janeiro - Minas Gerais (7 airports), North Two (7 airports), and Sao Paulo - Mato Grosso do Sul (7 airports).

Due to an abrupt increase in global oil prices, the average gasoline prices increased by 16.3% in Brazil

- With increased international prices, an oil producer and refiner Petrobras-based company raised wholesale diesel prices by 24.9%, gasoline prices by 18.8%, and LPG prices by 16.1% in 2022. The primary fuel used to produce food in Brazil is liquefied petroleum gas, which is directly correlated with oil barrel prices.
- Due to the increase in oil prices in 2021, gasoline and diesel costs rose throughout Brazil. According to official statistics, fuel costs in Brazil climbed by more than 33% in the same year, resulting in more than 12% annual inflation. Residential gas prices increased by an average of 35%. Under the new law (n. 190/2022), the ICMS manufacturing tax is computed using a fixed number rather than a percentage of the pump price. In communities without access to conventional natural gas distribution networks, the ICMS contributes around 14% of the cost of a liter of diesel or a 13-kilogram LPG tank at the current pump price. The ICMS computation for biodiesel, diesel, gasoline, hydrous ethanol, and LPG would be adjusted. At the end of 2022, the Brazilian government was also expected to reduce or eliminate federal fuel taxes on biodiesel, diesel, and LPG for domestic production and imports.
- The Brazilian state oil company Petrobras approved a new fuel pricing policy for gasoline and diesel in May 2023 that sharply lowers costs by 13%. In August 2023, due to an abrupt increase in global oil prices, Petrobras planned to hike average gasoline prices by 16.3% to BRL 2.93 (USD 0.589) per liter, while diesel prices would be raised by an average of 25.8% to BRL 3.80 (USD 0.718).

Brazil Freight & Logistics Industry Overview

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The Brazil Freight and Logistics Market is fragmented, with the top five companies occupying 2.38%. The major players in this market are Braspress Transportes Urgentes, Deutsche Post DHL Group, FedEx, JSL SA and Kuehne + Nagel (sorted alphabetically).

Additional Benefits:

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

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