

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

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Report description:

The Chile Freight and Logistics Market size is estimated at USD 8.68 billion in 2024, and is expected to reach USD 10.79 billion by 2029, growing at a CAGR of 4.45% during the forecast period (2024-2029).

Rising ecommerce domestic and international parcel volumes along with infrastructure investment leading the market growth

- Chile has one of the most stable and free-market economies in Latin America. Although logistics in Chile is still on a path to development, import and export operations from the country have increased in the last few years. The country's perfect geographic location offers great potential to countries like Europe, Asia, and South and Central America to connect by air, sea, or land. The Chilean government approved Chilean State Railways' (EFE) USD 1.9 billion 2020-22 investment plan.
- E-commerce is a major factor driving the demand for transportation services. Chile is the 31st largest market for e-commerce, with a revenue of USD 7.2 billion in 2021, placing it ahead of Colombia and after Finland. With an increase of 23%, the Chilean e-commerce market contributed to a global growth rate of 15% in 2021. Of all e-commerce categories, Toys, Hobby, and DIY is the largest segment in Chile and accounts for 30% of the e-commerce revenue in Chile. It is followed by electronics and media at 25%, furniture and appliances at 22%, fashion at 17%, and food and personal care at 6%.
- The domestic parcel traffic in Chile amounted to 573,200 metric tons transported in 2021, more than double the number of packages transported in 2019. The international parcel traffic in Chile amounted to 16,510 metric tons transported in 2021, an increase of 3% compared to 2020.

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Chile Freight and Logistics Market Trends

Chile's transport and storage sector made a strong recovery with 27.9% growth in 2022, fueled by maritime services

- The transport and storage sector steadily recovered in 2021, with a notable 24.41% YoY growth in its contribution to GDP. In 2022, the sector continued to expand, particularly in transportation, which saw a substantial 27.9% growth, primarily attributed to the expected growth in maritime services. The rise in services was primarily driven by improvements in road infrastructure and increased demand for storage solutions.
- The "Chile Over Rails" initiative encompasses a comprehensive plan comprising 27 projects to be implemented by 2027, with a combined investment of USD 5 billion. These projects aim to modernize passenger and freight railway infrastructure managed by the Chilean Railways Company, Empresa de Ferrocarriles del Estado (EFE). The overarching objective is to triple annual ridership to 150 million passengers and double the freight transportation volume to 21 million tons by 2027. Among these projects is the Alameda (Santiago) Melipilla Railway, which opened for bidding in June 2021 and entails a USD 1.5 billion investment for a 37-mile track extension, anticipated to be finalized by 2025.
- Chile's Public Works Ministry (MOP) announced a USD 4.7 billion concessions plan in 2021, under which highway projects would cost around USD 11 billion over the next five years. Other projects include hospitals, airports, cable cars, trams, and re-tenders for groups of jails. For instance, the value of roadwork projects over the five years exceeded USD 11 billion. The re-tenders for Routes 78 (USD 892 billion) and Route 68 (USD 903 billion) are the highest-value initiatives in the portfolio of public tender for the growth and development of the logistic infrastructure.

Chile proposes mitigating fuel hikes by doubling stabilization fund to USD 1.5 billion

- The price of diesel in Chile increased by 35.48% in 2021, compared to 2021 and reached USD 0.84 due to fluctuations in the international demand for distillate fuels and restrictions on the supply side. Gasoline Prices in Chile remained unchanged at 1.42 USD/Liter in August 2023. As of March 2022, the average diesel price in Chile was reported at 1.15 USD per liter. Chile reported one of the highest gasoline prices in Latin America and the Caribbean, with an average price of 1.58 USD per liter in June 2023.
- Due to its small oil production, the South American countries are extremely vulnerable to changes in the price of oil on the world market. Chile's crude oil imports were reported at 145.547 barrels/day in December 2022 a decrease from the previous number of 164.159 barrels/day for December 2021. After oil prices rose sharply due to Russia's invasion of Ukraine, the Chilean government proposed doubling the size of a fund that helps cushion fuel price spikes to USD 1.5 billion. Despite the struggling economy and rising inflation, the government promised to increase social programs while exercising fiscal restraint.
- In 2021, the Chilean Ministry of Energy passed the country's first energy efficiency law, Law 21305-2021, which impacts construction, housing, heating, and transportation. The Ministry of Energy established interoperability standards for electric vehicle (EV) charging infrastructure and designated hydrogen as an official fuel source. Chile has ambitious EV sales targets of 100% zero-emission technologies for light- and medium-duty vehicles, urban buses, and large machinery by 2035.

Chile Freight and Logistics Industry Overview

The Chile Freight and Logistics Market is fragmented, with the top five companies occupying 17.10%. The major players in this

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market are Agunsa Logistics, Deutsche Post DHL Group, DSV A/S (De Sammensluttede Vognmænd af Air and Sea), Kuehne + Nagel and SAAM (sorted alphabetically).

Additional Benefits:

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

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