

Brazil 3PL - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 150 pages | Mordor Intelligence

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Report description:

The Brazil 3PL Market size is estimated at USD 34.61 billion in 2025, and is expected to reach USD 42.64 billion by 2030, at a CAGR of 4.26% during the forecast period (2025-2030).

The pandemic affected the logistics sector in the beginning, but later, after restrictions eased, it expanded with the growth of 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 increasing investments 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 is Driving Market Growth

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

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

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.

Brazil's trucking sector is moving toward 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. 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 and medium trucks. Thus, the increasing freight trucking is driving the third-party logistics market in the country.

Growth in E-commerce is Fueling the Growth of the Logistics Sector

Brazil is the most populated country in Latin America, continuously experiencing rapid growth in e-commerce expansion. 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. According to industry experts, it comprises around 37 million unique online shoppers per quarter, which amounted to about 369 million orders in 2023.

The pandemic boosted the growth in online purchases. The Brazilian government issued pandemic relief via digital wallets, further increasing e-commerce sales in the country. In addition, despite the functioning of brick-and-mortar stores after the pandemic, Brazil's population preferred online retail channels. In 2022, online shoppers reached nearly 108 million, up by more than 24%. Brazil's e-commerce penetration was 54.75% in 2023, and it is expected to be 57.12% in 2024.

Brazil 3PL Industry Overview

The 3PL market is fragmented. Some of the players include 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 competing on quality and range of offerings is difficult. 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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