

## **Brazil Freight and Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Brazil Freight and Logistics Market size is estimated at 111.1 billion USD in 2025, and is expected to reach 140.7 billion USD by 2030, growing at a CAGR of 4.83% during the forecast period (2025-2030).

Growing competition supported by rising government investments of around USD 34 billion from 2024-2026

- Brazil aims to secure approximately BRL 180 billion (USD 34.03 billion) in private investments for new rail and highway projects between 2024 and 2026. The government plans to invest around BRL 80 billion (USD 15.12 billion) during the period of 2023 to 2026. However, it is anticipated that about 35 tenders will attract over twice the amount of private-sector investment.
- Brazil is working toward modernizing and developing its roads, which would further strengthen long-haul trucking in the country. For instance, in 2023, the Inter-American Development Bank (IDB) approved a USD 480 million loan as part of the State of Sao Paulo Highway Investment Program to sustainably boost the competitiveness of the state's production chains. The operation will boost production capacity and international and national integration by connecting less developed regions. Brazil is seeking investments worth USD 62 billion in highways by the end of 2026.

Brazil Freight and Logistics Market Trends

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Brazil has secured billions in logistics investment and expanded privatization efforts to bridge infrastructure gap

- In January 2024, Brazil received a substantial funding injection of USD 1.7 billion from the New Development Bank, marking a crucial step in the country's efforts toward sustainable development and climate resilience. The initial USD 500 million tranche is designated for the BNDES Climate Program, aimed at reducing greenhouse gas emissions and facilitating climate change adaptation efforts. The remaining USD 1.2 billion will support sustainable infrastructure programs, aiding states and municipalities in transitioning to greener practices.
- In November 2024, Brazil's Ministry of Ports and Airports rolled out a significant investment blueprint, heralding the privatization of the nation's key terminals. This ambitious plan encompasses over 50 initiatives, spanning port leases and concessions, set to unfold over the next 2 years, extending to 2027. With projections suggesting an influx of over USD 3 billion, the Brazilian port sector stands poised for a major financial boost. At the Port of Santos alone, authorities are eyeing at least 5 leases, which include concessions for three terminals and the pivotal navigation channel. Highlighting the plan's significance, the auction for the STS10 Terminal is on the docket, with its sights set on the final quarter of 2025.

Diesel prices witnessing a drop in demand due to seasonal variation and economic slowdown in 2024

- In March 2024, seasonal variations and signs of an economic slowdown led to a dip in Diesel demand in Brazil. Petrobras' decision to cut Diesel prices, coupled with a mandate to boost biodiesel blending from 12% to 14%, further fueled the decline in demand for traditional fossil Diesel. The domestic market was also swayed by global fluctuations in crude oil prices and government efforts to stabilize these prices. Notably, even with an excess of 3.2 million barrels of Russian Diesel in hand, Brazil maintained its shipments, not halting them entirely.
- Starting January 1, 2025, Petrobras, Brazil's state-run oil giant, raised jet fuel prices for distributors by approximately 7% in key marketing areas, including Betim, Guarulhos, and Duque de Caxias. Petrobras adjusts its jet fuel prices monthly, taking into account variables like oil prices and exchange rates. Looking ahead to 2025, Brazil is projected to produce an average of 3.88 million barrels per day (Mb/d) of oil and 187 million cubic meters per day (Mm<sup>3</sup>/d) of natural gas. This equates to a total of around 5.05 million barrels of oil equivalent per day (Mboe/d). The majority of this production will be sourced from the Santos basin, home to the nation's concentrated pre-salt fields.

## Brazil Freight and Logistics Industry Overview

The Brazil Freight and Logistics Market is fragmented, with the major five players in this market being A.P. Moller - Maersk, 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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