

Brazil Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Brazil Road Freight Transport Market size is estimated at 45.07 billion USD in 2025, and is expected to reach 56.55 billion USD by 2030, growing at a CAGR of 4.64% during the forecast period (2025-2030).

Brazil is expected to produce 76% more grain and 41% more oilseeds by 2031, driving the market's growth

- Industrial production in Brazil stuttered for most of 2023 as elevated borrowing costs took their toll but started to pick up in the second half of the year. Production growth in December 2023 rose more than 6% from the previous month, which was driven by durable goods output. Moreover, overall production in December 2023 also grew 1.0% from a year earlier. The country's production growth drove the demand for road freight services.
- Brazil has uncultivated land with high potential for future agricultural production. An additional 20 million hectares of cropland are expected to be put into production by 2031, representing a 2.6% annual growth rate. This would be one of the world's fastest rates of cropland expansion. To meet projected demand from consumers, including maize and soybean importers from countries such as China, Brazil aims to increase its grain production by 76% and oilseed output by 41% by 2031, relative to figures from the decade's start. As a result, the end-user segment is expected to grow in the coming years.

Brazil Road Freight Transport Market Trends

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In 2022, Brazil secured USD 47.27 billion 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 2023, the Brazilian government allocated USD 2.59 billion to infrastructure logistics, covering highways, railways, ports, and airports, with the majority, about USD 2.42 billion, directed towards highways while railways received a smaller portion of USD 30.25 millions. However, there are plans to unveil a significant national initiative to boost investments in freight rail projects by June 2024, combining both public and private sector funding. The government intends to inject USD 4 billion into these projects.

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

- In March 2024, Brazil saw a drop in Diesel demand due to seasonal variations and a possible economic slowdown. Petrobras' move to lower Diesel prices and the requirement to increase biodiesel blending from 12% to 14% also contributed to this decline in demand for pure fossil Diesel. Global shifts in crude oil prices and government initiatives to stabilize prices were key factors influencing the domestic market. Despite having an excess of 3.2 million barrels of Russian Diesel, Brazil continued to receive shipments without a complete stop.
- In February 2024, diesel, gasoline, and cooking gas prices rose by around 12.5% due to adjustments of the ICMS state goods and services tax. This increase was decided by the national committee of state finance secretaries in October 2023 and marks the first adjustment of ICMS on fuels since 2022. A law passed previously unified this tax across Brazil and set a minimum period of 1 year before the first rate change, with subsequent revisions permitted every 6 months. The next price adjustment is expected by 2024 year end.

Brazil Road Freight Transport Industry Overview

The Brazil Road Freight Transport Market is fragmented, with the major five players in this market being Expresso Nepomuceno, JSL SA, Rodonaves Group, Transpanorama Transportes SA and Transportes Bertolini Ltda (sorted alphabetically).

Additional Benefits:

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

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